BEAVERTON SCHOOL DISTRICT

Beaverton School Board Business Meeting

District Office
1260 NW Waterhouse Avenue
Beaverton, Oregon 97006
Tuesday, October 13, 2026 7:00 PM
Video Stream: www.youtube.com/beavertonschools
Meeting Materials: beavertonsd.org/boardmeetings

AGENDA

I. **OPEN MEETING**
- A. Call to Order
- B. Attendance
- C. Agenda Review

II. **PERFORMANCES & RECOGNITIONS**
- A. Aloha High School Theater Performance
- B. Student Board Representatives Introductions
- C. September BSD Achievers 3

III. **SUPERINTENDENT'S REPORT**
- A. Comments by the Superintendent

IV. **PUBLIC COMMENTS** **4**
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IX. **BOARD COMMUNICATION**
- A. Comments & Committee Reports

X. **CLOSE MEETING**
- A. Closing Comments
- B. Adjourn

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, veterans' status, or because of a perceived or actual association with any other persons within these protected classes.

BEAVERTON SCHOOL DISTRICT

Belong. Believe. Achieve.

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RECOGNITION OF STUDENTS, STAFF AND COMMUNITY

SUMMARY
The district recognizes the following individuals for their achievements and contributions to the Beaverton School District and the community.

BACKGROUND

September BSD Achievers
Congratulations to Sue Plew, library media assistant at Errol Hassell Elementary, Julia Eggers, first grade teacher at Jacob Wismer Elementary, and Andy Phillips, custodial foreman III at Mountainside High School, who were named BSD Achievers for September.

BSD Achievers is a program that recognizes the hard work and dedication of BSD staff members. Each month, three honorees are selected from nominations submitted by students, parents and guardians, staff and Beaverton community members.

Tonight we celebrate Sue, Julia and Andy with a video of their surprise award presentations.

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Written comments were accepted by online form submission from 12 p.m. on Friday, October 9, 2026 through 12 p.m. on Tuesday, October 13, 2026. The following comments followed all the posted guidelines listed on the form and below.

Comments are limited to 1,000 characters. One comment per person, comments listed oldest first.
The board will not hear charges or complaints against any district employee. District staff and board members cannot be named specifically in testimony.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Marne	Manoukian	Parent/guardian	Yes	I will focus on declining enrollment. Birth rates are a factor, yes, but families are leaving because of many concerns. Our capture rate shows a growing gap between babies born here and children enrolled in Kindergarten. This is an all-hands-on-deck moment. Losing 600 students means losing more than $7 million in funding, along with jobs and schools. I have four suggestions. First, ask families why they're leaving. Survey them and ask whether tech, class size or other experiences influenced their decision. You need this information to find solutions. Second, consider creating a low-tech or no-tech elementary option school. If a school faces closure, why couldn't it become an option school? I believe you'd see many interested families. Third, invite families into our schools. Offer fall tours for new and prospective families before the enrollment season. Let them see what we're proud of firsthand. Fourth, invest in people and small class sizes.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Halah	I	Parent/guardian	Yes	Thank you for setting up a tech advisory committee. However, please push for technology guidelines for young kids ASAP. My son got access to an IPad at school for the first time and told me many of the kids were taking selfies using the camera feature. We're a strict low tech family, and the next morning, he had already found the iPad and was trying to take selfies (there is a passcode, but that doesn't stop the camera feature). It's not a big deal situation, but it provides insight into how addicting technology can be for curious kids. In addition, kids are so quick to find work arounds for security settings. I've heard of kids using Google Maps to access restricted websites and finding work arounds to watch YouTube. O/ issues: too much screentime leads to attention issues, near sightedness, addiction issues, AI thinking for them We aren't anti technology, but in person, / paper and pencil seems like the best way to learn writing, math, etc. Do kids actually learn best with iPads?

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Libby	Sanford	Parent/guardian	Yes	I appreciate Veronica and her team proactively putting together a great committee. However, the Lightspeed findings and lack of accurate, trustworthy data are alarming. Last week, my six-year-old was told in his tech special, "When you come into the classroom quietly, you can play with iPads." How did iPad playtime become an acceptable reward for six-year-olds? Technology should support learning, not be used as a behavioral incentive. Reportedly, there is no Lightspeed reporting for K–2 iPad use. If BSD cannot adequately monitor usage, why are our youngest learners accessing these devices? 13 organizations and experts recently warned 150 large school districts, including BSD, about emerging litigation involving YouTube and Google Gemini. Google can afford costly legal battles; can BSD and its taxpayers? We cannot wait for a preventable incident or lawsuit to act. Teachers need guidance; families and students deserve transparency and policy.
Rebe	C	Parent/guardian	Yes	As you begin to consider potential facilities changes, I urge you to pay attention to what is working in BSD. Enrollment numbers and building capacity are important considerations, but they should not be the only measures used to determine a school's value or future. Small Title I schools that serve diverse communities and achieve strong academic outcomes are an important part of our district. Before making decisions that could significantly impact these schools, please understand what makes them successful—their leadership, staff, school culture, family engagement, and the relationships they build with students and their communities. Please take the time to learn from these schools and consider how any proposed changes would preserve the strengths that are already benefiting students. Facilities planning should not simply focus on efficiency and capacity; it should also recognize the educational outcomes, community connections, and supportive environments that help children thrive.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Alison	Tierney	Parent/guardian	Yes	Dear Board Members and Superintendent Smith, As a BSD parent, I'm open to change, but I expect a process that earns the community's trust. Please: 1.Publish criteria, assumptions, alternatives, and projected impacts before recommendations take shape, and let families influence options while they're still open. 2.Make clear who is accountable: the superintendent and board should own their recommendations. 3.Look beyond enrollment. Small Title I schools with strong outcomes deserve careful consideration. 4.Update educational specifications and address overcrowding alongside underused buildings. 5.Resource transitions well, with a real voice for both communities. 6.Plan for any vacated buildings, with proposed uses and a timeline. Thank you for your consideration - Alison Tierney - Raleigh Park Elem.
Megan	McMillan	Parent/guardian	Yes	As you make tough decisions about BSD's future, I ask that you do so with urgency, transparency, and with student outcomes at the center. For over a year, our community has been living in limbo, wondering if our neighborhood school is going to close. We still have no idea how these decisions will be made, why, by whom, or when—and I want to avoid hearing about them via a buried document on a website. Furthermore, we have yet to see a revised Educational Specification that provides a clear north star for school sizes that actually drive student achievement. Instead of progress, the district appears to have established another committee on a road to nowhere, seemingly designed to quiet those concerned about technology in schools. Finally, I was horrified by the recent email celebrating that BSD "outperformed" state test averages. It's not a victory when only 41.5% of third graders meet English Language Arts standards and a mere 30% of eighth graders are at grade level in math.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Chris	Ragan	Parent/guardian	Yes	I am concerned about students watching hours of video entertainment on school Chromebooks each week. Teachers are aware, but this practice continues. It wastes instructional time and undermines learning. I ask the board to enforce clear acceptable-use policies, improve content filtering, and provide teacher training to ensure technology is used for education, not entertainment.
Keaghan	Cronin	Parent/guardian	Yes	The reliance on math apps held my son's academic progress back by several months and mischaracterized his abilities. Due to minor fine motor delays, the app could not accurately capture his drawings of shapes, forcing him to repeat completed concepts. Similarly, the app marked his answers wrong for writing numbers backward—a behavior that is entirely age-appropriate for kindergarten through second grade. As a result, technology misjudged his cognitive abilities and limited his learning. Because teachers were not tracking why students were missing questions, these errors went unnoticed. I oppose using apps for core academics unless they are used strictly to enhance active teaching under close teacher oversight.
Louie	C	Parent/guardian	Yes	Please consider optimal school size for students learning and sense of belonging when proposing a long term facilities plan. Our students and their communities should be at the top of your mind when making decisions that directly impact their outcomes at school. Please consider thoughtful boundary changes to increase enrollment at under utilized schools before looking at major consolidation plans. How can you work WITH your community to create the best path forward?

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Stephanie	S	Parent/guardian	Yes	As BSD begins its next phase of long-range planning, the order of operations matters. Before developing scenarios, update the ed specifications with Teaching and Learning input: what school sizes and learning environments best support students and strong school communities? What's working well, especially for Title I schools? Then evaluate boundary changes to rebalance enrollment and resources across both overutilized and underutilized schools. Capacity alone should not determine a school's future. Please show your work: publish the criteria, assumptions, alternatives and tradeoffs before asking families to respond to proposals. Meaningful engagement must happen while options are still open, with a clear explanation of how public input affects recommendations. The superintendent and board must own their recommendations and decisions, rather than shifting responsibility to a committee or consultant. A transparent sequence and clear accountability are essential to earning trust.
Shannon	C	Parent/guardian	Yes	The issuing of personal Chromebooks has gotten completely out of control. I have 4 kids in the Beaverton School District and they say that in many of their classes, they are on their Chromebooks the entire time and most kids in class are just playing games or watching YouTube videos. Every single time the district tries to block access to YouTube videos or other inappropriate content, the kids find a way around it. My kids have shown me how students can access YouTube in a myriad of different ways, including Windows explorer, Google Docs, help documents, specific apps, and websites… Basically anytime the district tries to put blocks and filters, kids find a way around it. These Chromebooks should not be issued to the kids directly. They could be used in class when they need it, but they are becoming dependent on the technology and it is affecting their cognitive development. Recent cognitive studies show that this generation has more cognitive decline than any generation before.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Michael	B	Parent/guardian	Yes	Dial back the reliance on computers and videos. More real books. Real worksheets. Real math. Real writing pen to paper for essays. We are failing our children by taking the easy way out. This year has been an improvement, let's keep it going and dial the tech back even further. There is a reason that the nicest, prestigious, elite schools give their students real assignments that don't rely on computers. No classroom tech before 6th grade. No AI slop garbage. No Youtube.
Michelle	Roach	Parent/guardian	Yes	I think the school district should be very careful in their use of screens at school. Also, education for parents around use of technology would be very helpful.
Vinutha	VH	Parent/guardian	Yes	I think kids should not be introduced to screens atleast in elementary schools. No dream box no Lexia can give them the knowledge that a teacher can provide them. I see that kids enjoy them initially but as the time progresses they get frustrated with these apps, and lose interest in learning itself. I would prefer kids have more worksheets and homeworks. Writing by holding a pencil is known scientifically to engage motor, visual and memory more than any other touch screen or typing on device. Also, I request BSD to stop using some YouTube videos or songs to do brain breaks. Rather than kids getting focused they become more distracted. Overall, I request to reduce all the unnecessary screen time for kids. The screen time at school should be no more than 1 hour - which includes all the TV they see, brain breaks, lexia or dream box or state testing.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Molly	Gates	Parent/guardian	Yes	I am writing to express my strong support for Schools Beyond Screens and for common-sense technology policies that prioritize meaningful learning, human connection, and deep engagement in our classrooms. Technology has a place in education, but its use must serve learning—not replace the fundamental practices that help children develop knowledge, critical thinking, creativity, and independence. I believe, and emerging research and data are showing, that we have reached a point where we need to take a serious, honest look at how technology is being used during the school day and whether that time is truly benefiting our children's education. I have witnessed first hand how the use of online learning in elementary classrooms masks real learning and fractures attention. Let's be a leader by putting common sense technology limitations in place and reducing the reliance on technology as a tool for learning. Our students deserve it!
Karen	Chiang	Parent/guardian	Yes	I and other parents I've spoken with are very disappointed with the amount of passive TV used in even Kindergarten. This seems like a bare minimum to not just watch TV every day in school. Especially during snack time - when they should be focused on food and socializing. I was told by the teacher they don't have to watch if they don't want to, but I think it's a little bit far-fetched to expect kids to be able to tune out TV when it is on.
Pallavi	Kadam	Parent/guardian	Yes	I am here to support reducing the screen time
Shilpa	R	Parent/guardian	Yes	Too much of screen time is affecting students focus and attention span which is directly affecting their eyesight ,memory ,mental challenges too

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Matthew	Albertson	Other Community Member	Yes	As my dad, Barry Albertson, taught me, board members are elected to steward policies that center learning and growth. When decisions are made, that's the North Star. To this end, I recommend the board take a solid stand against AI. This is an insidious technology. Sam Altman, CEO of OpenAI, said "we see a future where intelligence is a utility… and people buy it from us on a meter." These companies center their wellbeing, not students' wellbeing. AI products encourage cognitive offloading, and the very use of AI deskills. For example, a 2025 study in The Lancet by Budzyn, et al, showed that, after 6 months of AI use, doctors' Adenoma Detection Rate of standard colonoscopy decreased significantly, a 20% decrease in their ability to detect tumors in the gut. Doctors are not exempt from this deskilling effect. Why think kids are? Choosing the easy way over the right way means children will be left behind. I know none of you want that. So take a stand; declare moratorium.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Daniel	Turk	Parent/guardian	Yes	Hello. Thank you for reading this message. My wife will be speaking during public comment tonight. Her and others are having a rally before the meeting. They are concerned about unchecked and unthought technology in classrooms. I'm very proud of her. What she is doing is the most important thing that our family is doing right now. Please be kind to them. Please respect the effort and thought that they are putting into this advocacy. Please be mature enough not to shoot the messenger of bad news and treat them like the problem. Please be mature enough to admit if you individually or collectively have made mistakes. Please do not believe that you know the answer to these things. Nobody does. They ask for us to take the time to think through together how to best move forward. I think that's wise, reasonable and considerate and caring of all of us. Who else you are listening to? What are their motivations? I am certain my wife's sole motivation is to help children, including our own.
Lokesh	Muddagowda	Parent/guardian	Yes	The kids are using too much of device in school and out side of school. Most of their class work and home work is done on a device. This should avoided as much as possible. While working on device kids get distracted and waste of time. Work which can be done in 1hr takes 2 hr. The device are making kids isolate themselves from outside world and always hooked on to the screen. They don't interact with parents, they don't have friends and they don't like playing outside. This is not a good social behavior. It affect also the mental state of the kids. The school policies should encourage the writing on the paper and reading books as much as possible.
Shwetha	Vikaskiran	Parent/guardian	Yes	Kids should be doing everything on a book. Especially Math

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Lindsey	Voorhees	Other Community Member	No	Dear Board Members and Superintendent, As an invested nearby community member, I urge BSD leaders to accelerate action on screen learning and AI safety. With a levy potentially approaching, it is important to address community concerns before asking taxpayers for additional funding. While I appreciate the K-5 Tech Committee's efforts, K-12 student protections cannot wait. Tonight, I ask the board to take three immediate actions: 1. Begin drafting an enforceable K–12 screen time policy with a clear timeline for public review and adoption. 2. Adopt a temporary AI moratorium pending a comprehensive safety review and transparent community discussion. 3. Begin transitioning from reactive blacklisting to intentional whitelisting for student web access, recognizing that full implementation will take time. BSD students deserve proactive protections now, and your community needs to see meaningful progress, to maintain trust in BSD elected leaders.

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Sravani	Pagala	Parent/guardian	Yes	Dear BSD Leadership and School Board, I encourage BSD to consider reducing classroom screen time, especially in elementary and middle school grades. While technology is a valuable learning tool, students spend increasing amounts of time on screens during the school day. Excessive screen use can contribute to eye strain and reduce opportunities to develop handwriting and note-taking skills. Several Texas school districts have reduced classroom screen use by increasing hands-on learning, paper-based assignments, physical books, and recess time. Some have adopted screen-time limits for elementary students. I encourage BSD to explore: Limiting screen time in younger grades. Increasing handwritten assignments. Expanding use of physical books and worksheets. Prioritizing hands-on, teacher-led instruction. Technology should support learning, not replace traditional methods. A balanced approach can improve student engagement, handwriting, and overall well-being.
Priya	Rajkumar	Parent/guardian	Yes	I wanted my kids to go old school text book and writing style. My kids are spending so much time on screen that it impacts their health and mental abilities at greater risk. My kid can't stay focused on non screen

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Crystal	Weston	Other Community Member	No	Dear board members and superintendent, My name is Crystal Weston, and I am a board member at the Tigard-Tualatin School District and am commenting as myself and not representing the district. Thank you for engaging and putting in the work to address what the science tells us about learning through educational technology. The issues with these platforms, sold to us by industry giants, include: oFailure to deliver educationally, oUndermined student attention and focus, oLack of accountability as algorithms decide what and how much kids learn- an equity nightmare, oPrivacy, security and safety risks and oLess human connection between educators and students. You have done the work and now it is time to lead with decisive actions. K12 Screen Time Policy AI Moratorium Green List Framework Respectfully,

First Name	Last Name	Association with the Beaverton School District	Are you a resident of the Beaverton School District	Comments
Ketaki	Deshpande	Parent/guardian	Yes	I request BSD to completely eliminate Gimkit from their apps it is very addictive kids are creating games and can play with each other by sharing code from anywhere and not benefits at all in the school work mostly I have seen used in Spanish please use a book instead or any other paper source it is terrible to see kids in middle school wasting their time playing Gimkit.
Courtney	Edwards	Parent/guardian	Yes	Our 7th grader is constantly distracted by his Chromebook. The kids pass around a compilation of html offline game files through Google Docs that the district monitoring cannot detect. The teachers are constantly fighting for the students' attention, and of course the kids can't resist playing games. Many of these games are inappropriate and violent, and they play these on the bus or outside the school when they are unsupervised. The school knows this, and still has not found a way to block such distractions. Our family is frustrated that the school has given our child a device he doesn't need to learn, that inhibits his learning, that the school cannot control. We request BSD pull the Chrome Books, use a laptop cart to house them, and only check them out when absolutely necessary and when they are safely controlled.

ITEM FOR INFORMATION

PROGRAM REPORT: BEAVERTON EDUCATION FOUNDATION

SUMMARY
Beaverton Education Foundation representatives will share an overview of the foundation that provides support for BSD schools. In 2025–26, with support from individuals, businesses, foundations and organizations, BEF invested $410,000 in Beaverton schools. Funding was provided for 189 projects and programs across all BSD schools.

RECOMMENDATION
BEF representatives will present information about the foundation and its work. No action is needed.

Beaverton School District does not discriminate in any programs or activities 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.

Beaverton Education Foundation

Update to the Beaverton School Board

Lauren Garrett, Executive Director

Beaverton Education Foundation

SINCE 1988

38 years of understanding the need



3,300
academic projects and programs

Nearly $7M
invested in programs and projects

Meet the need

Build and test

Scale what works

Join Beaverton Education Foundation and ensure our Beaverton students reach their highest potential.
www.BeavertonEDfoundation.org

OUR ROLE

Convening the broader community

- **Relationships**
- **Perspective**
- **Test and scale**



MEET THE NEED

Projects and programs: listening to educators

200+

applications from educators last year

54 schools received awards in 2025-2026

84%

of Beaverton students participated in a BEF-funded program

What educators asked for in 2025-26



Beaverton's Choice awards by focus area

BUILD AND TEST

Extended learning

Building skills for our youngest learners

Reaching our most vulnerable students

Supporting the next generation



SCALE WHAT WORKS

Leveraging partnerships

THE DISTRICT

Education experts

Decades of experience and success serving Beaverton students, the knowledge and systems to identify those who need support most.



BEAVERTON EDUCATION FOUNDATION

Philanthropy experts

Decades of experience and success cultivating, soliciting, and stewarding donors, plus the nonprofit systems to do it well.

Let's Be the Best Beaverton



ITEM FOR INFORMATION

PENSION OBLIGATION BONDS

SUMMARY
Oregon law allows public bodies, including school districts, to issue bonds to finance pension liabilities. The district is exploring whether issuing new pension obligation bonds may be beneficial if market conditions are favorable. A bond advisor from Piper Sandler will present an overview of pension bonds.

BACKGROUND
Oregon law allows public bodies, including school districts, to issue bonds to finance pension liabilities. Pension obligation bonds are a financing tool that allows an Oregon public employer to borrow money through bonds and deposit the proceeds into a PERS side account. The intended purpose is to reduce a portion of the employer's unfunded PERS liability and, in turn, its required PERS employer contribution rates. The strategy is based on the expectation that long-term investment earnings within the pension system will exceed the interest cost of the bonds. If investment returns outperform borrowing costs, the employer can reduce future pension contribution costs and improve long-term budget stability.

A bond advisor from Piper Sandler will present to the board, providing an overview of how pension bonds work, review of market conditions and discussion of whether the district should consider a resolution to authorize selling a pension bond if market conditions improve.

RECOMMENDATION
An overview of pension obligation bonds will be presented as an item for information. No action is needed at this time. In a separate item for action at a future meeting, it will be proposed that the board authorize the issuance of pension bonds if market conditions support the district's financial objectives.

Beaverton School District does not discriminate in any programs or activities 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.

PIPER | SANDLER



Pension Obligation Bonds: Presentation to Beaverton School District

October 13, 2026

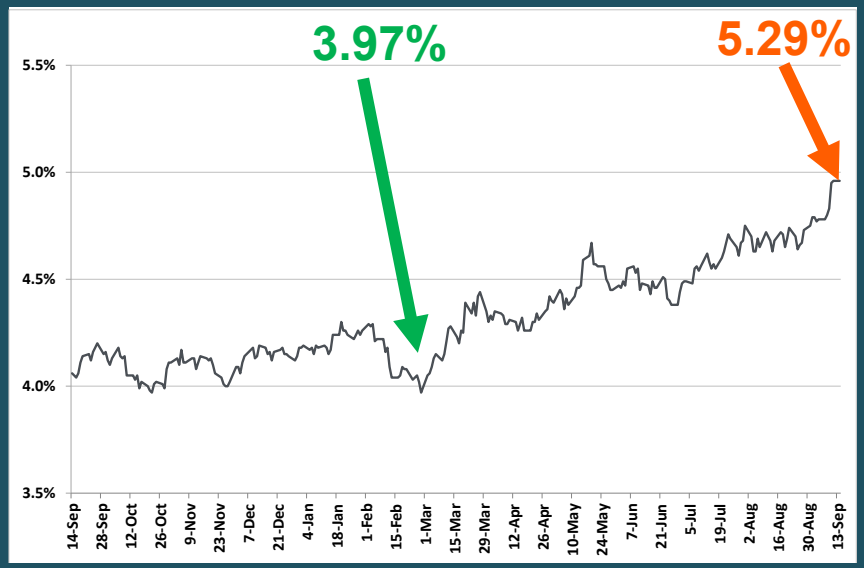
POBs: How do they work?

- Concept is to borrow to reduce unfunded pension liabilities.
- Bond proceeds are deposited into Side Accounts (SAs) and invested with PERS fund; if returns exceed borrowing rate, jurisdictions generally save.
- POBs must be sold on taxable basis, so borrowing rates are higher than on capital borrowings.
- SAs are drawn down and provide 'rate credit' against overall PERS rates over ~20 years.
- From 1996-2022, over 150 Oregon jurisdictions issued POBs for over $8 billion.
- Generally positive PERS returns since borrowings means most, but not all, have realized savings.

Interest rates are rising. Why are we talking about borrowing?

- Pension Bonds (POBs) are a tool that work best when interest rates are low and investment returns are high.
- Returns at PERS have been strong, but interest rates have been rising steadily for six months.
- Assessment results are promising - more so than in 2021. But interest rates are higher than levels assessed.

10-year Treasury Note - 2026



- Entering into a POB takes significant time.
- Adopting a resolution now allows flexibility should rates decline.

PERS Historic Investment Performance

OIC manages PERS' investments.

Average Rates of Return (1970-2024):

Regular account earnings:	9.93%
Tier One Crediting:	9.21%
Tier Two Crediting:	9.03%
Variable Crediting:	10.84%
Avg. SA return 2007-2024:	7.60%

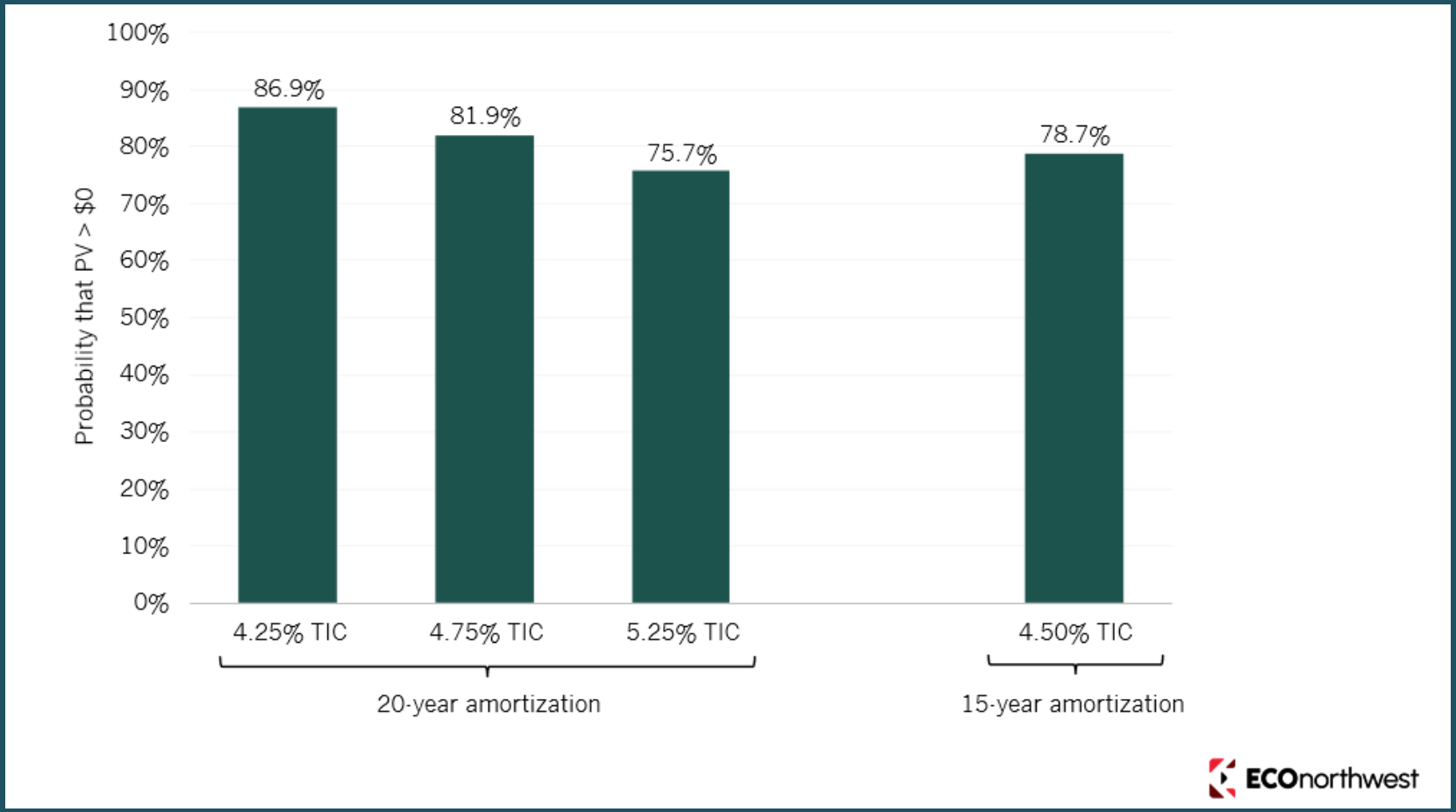
1 Year earnings thru 8/31/2026: 9.05%

Source: PERS by the Numbers; December 2025. OPERF monthly returns and asset allocation report; August 2026.

“Expected value of POB strategy is positive”

ECONW Assessment - June 2026

Probability that NPV is more than $0



Current estimated borrowing rate: 5.75%-6.00%

Poor rate of return is not the only risk

- Timing of earnings matter; early negative returns are hard to overcome.
- Rate credits will not be consistent:
  - ✓ SAs cause ‘doubling down’ of investment performance.
  - ✓ Earnings variability causes volatility, even if overall earnings rate exceeds bond rate.
  - ✓ Payroll growth will be different from assumption, leading to rate credit variability.
  - ✓ Changes in OPERF assumed rate of return changes UALs and rate credits, at least temporarily.
- Debt service is fixed but rate credit is variable: some years may have savings, others may not.
- **Holding reserves is crucial!**

Existing Pension Bonds and Side Accounts

- Borrowed $269 million combined in 2005 and 2015.
- All in interest rates of 4.77% and 3.70%, respectively.
- Bonds mature June 2028 and 2034, respectively.
- Faster than assumed payroll growth (8.11% annual growth from 2021 to 2024) accelerated SA drawdown.
- 2005 SA is projected to expire Summer 2027.
- District has saved $93 million, net of debt service, through December 2024.

Source: Oregon Public Employees Retirement System – System Actuarial Valuation Reports and Employer Actuarial Valuation Reports. Information for calendar years 2003 and prior was not readily available.

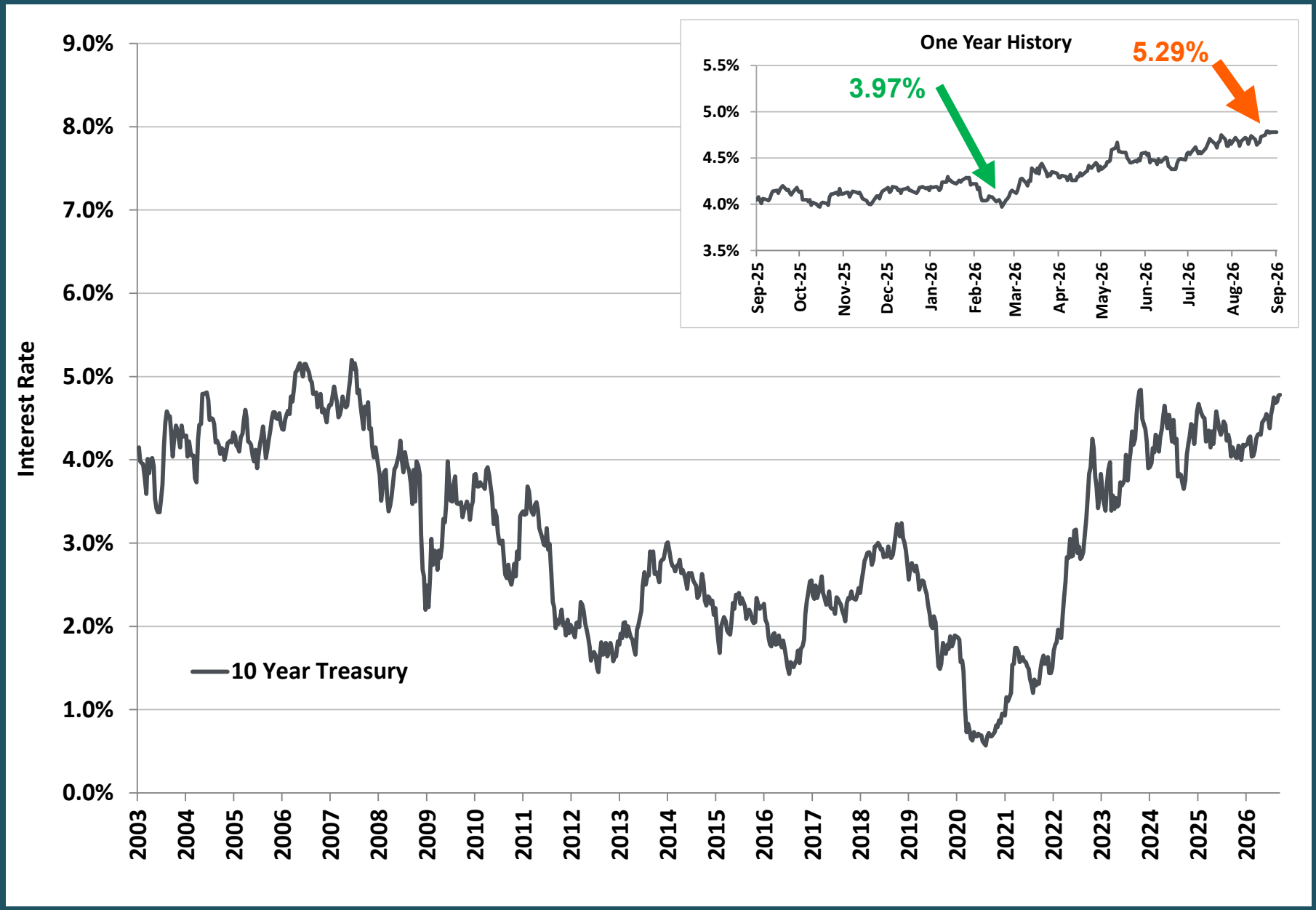
Existing Pension Bonds and Side Accounts

Pension Bonds Issued	Dated Date	Amount Issued	TIC
Series 2005A	6/21/05	189,935,000	4.77%
Series 2015	2/26/15	79,220,000	3.70%
Total Amount Issued		**$ 269,155,000**	

CALENDAR Year End	PERS Covered Payroll	Balance on January 1	Admin. Expense	Reported Rate Credit	Pension Bond Deposits	Reported Investment Earnings ($)	Reported Earnings Crediting (%)	Balance on December 31	Net Debt Service	Calculated Pension Bond Savings
Dec-2005	$ 146,310,994	$ -	$ (2,500)	**$ (6,721,523)**	$ 188,467,154	$ 18,579,343	13.86%	$ 200,322,474	**$ 4,633,512**	**$ 2,088,011**
Dec-2006	167,380,649	200,322,474	(1,000)	**(16,551,510)**	-	31,290,371	15.58%	215,060,335	**11,019,568**	**5,531,942**
Dec-2007	180,885,062	215,060,335	(1,000)	**(16,748,951)**	-	21,665,618	9.45%	219,976,002	**12,345,892**	**4,403,059**
Dec-2008	189,045,861	219,976,002	(1,000)	**(16,010,413)**	-	(56,427,308)	(27.32%)	147,537,281	**9,470,352**	**6,540,061**
Dec-2009	241,495,159	147,537,281	(1,000)	**(17,102,636)**	-	25,435,143	19.02%	155,868,788	**10,433,042**	**6,669,594**
Dec-2010	203,408,362	155,868,788	(1,000)	**(16,792,487)**	-	18,356,517	12.44%	157,431,818	**10,843,358**	**5,949,129**
Dec-2011	198,465,921	157,431,818	(1,000)	**(15,168,380)**	-	4,228,480	2.51%	146,490,918	**11,265,283**	**3,903,097**
Dec-2012	188,926,161	146,490,918	(1,000)	**(12,262,591)**	-	20,719,073	14.67%	154,946,400	**11,706,808**	**555,783**
Dec-2013	187,758,232	154,946,400	(1,000)	**(10,841,855)**	-	23,914,617	15.62%	168,018,162	**12,165,575**	**(1,323,720)**
Dec-2014	204,143,210	168,018,162	(1,000)	**(13,646,352)**	-	12,010,324	7.39%	166,381,134	**12,638,624**	**1,007,728**
Dec-2015	226,079,315	166,381,134	(3,500)	**(21,482,180)**	78,670,639	3,651,188	1.87%	227,217,281	**16,253,776**	**5,228,404**
Dec-2016	244,765,202	227,217,281	(2,000)	**(27,187,225)**	-	15,443,100	7.15%	215,471,156	**19,555,772**	**7,631,453**
Dec-2017	260,559,105	215,471,156	(1,000)	**(25,053,663)**	-	31,673,289	15.23%	222,089,782	**20,296,999**	**4,756,664**
Dec-2018	278,436,650	222,089,782	(1,000)	**(28,524,817)**	-	1,391,711	0.42%	194,955,676	**20,797,681**	**7,727,136**
Dec-2019	282,917,170	194,955,676	(1,000)	**(26,182,744)**	-	25,061,699	13.92%	193,833,631	**21,105,409**	**5,077,335**
Dec-2020	273,272,076	193,833,631	(1,000)	**(24,803,180)**	-	12,388,450	7.18%	181,417,902	**21,695,281**	**3,107,899**
Dec-2021	297,677,139	181,417,902	(1,000)	**(23,852,235)**	-	35,437,866	20.76%	193,002,533	**22,303,054**	**1,549,181**
Dec-2022	342,135,711	193,002,533	(1,000)	**(30,158,112)**	-	(3,392,353)	(1.81%)	159,451,068	**22,939,862**	**7,218,250**
Dec-2023	353,507,348	159,451,068	(1,000)	**(31,615,767)**	-	8,292,416	5.72%	136,126,717	**23,600,857**	**8,014,910**
Dec-2024	376,091,488	136,126,717	(1,000)	**(31,894,042)**	-	6,939,390	5.58%	111,171,065	**24,290,608**	**7,603,434**
									Subtotal (Actual)	**$ 93,239,351**

Source: Oregon Public Employees Retirement System – System Actuarial Valuation Reports and Employer Actuarial Valuation Reports. Information for calendar years 2003 and prior was not readily available.

Historical Borrowing Rates



Investment Scenarios Considered

All cases: Bonds mature June 2045; SAs expire December 2045

- **Base Case:**
  - ✓ 18-year fixed rate at 4.75% TIC
  - ✓ 6.90% reinvestment rate
- **2002 Issuer:**
  - ✓ 18-year fixed rate at 4.75% TIC
  - ✓ Reinvestment returns experienced by 2002 borrowers
- **2007 Issuer:**
  - ✓ 18-year fixed rate at 4.75% TIC
  - ✓ Reinvestment returns experienced by 2007 borrowers
- **Modified 2007 Issuer:**
  - ✓ 18-year fixed rate at 5.25% TIC
  - ✓ Reinvestment returns experienced by 2007 borrowers except Year 1 loss set to achieve breakeven.

Sensitivity Analysis Summary

UAL projected to be $506.3 million at payoff.

Scenario:	1 Assume 6.90% earnings for all years	2 Assume actual earnings from 2003-2021	3 Assume actual earnings from 2008-2025, then 6.90% for final year	4 Assume modified earnings from 2008-2025, then 6.90% for final year
Years where Net Rate Credit is negative	0	0	12	12
Years where Net Rate Credit is positive	20	20	8	8
Investment Earnings Crediting, First Full Year	6.90%	22.00%	-27.32%	-23.00%
UAL Payoff Cash Flow Savings (in millions)	$129.5	$331.0	$17.4	$29.7
NPV Savings (in millions)	$75.3	$193.9	($1.3)	$4.0
NPV Savings % of Projected Payoff	14.87%	38.29%	-0.25%	0.79%

Assumes bonds sold at TIC of 4.75% (Scenario 1-3) and 5.25% (Scenario 4).

Notes: "Average" Rate Credit may include years of both positives and negatives and does not take the time value of money into account. "Net Savings" is effective payroll rate credit after payment of debt. Assumes Employer payroll grows at 3.40% annually. To the extent higher or lower payroll growth is experienced, results will differ.

New Side Account Comparison

Scenario:	Status Quo Fiscal Year 2027	Status Quo Fiscal Year 2028	Status Quo Fiscal Year 2029	Base Case March 2027 - June 2027	Base Case Fiscal Year 2028	Base Case Fiscal Year 2029
2005 Side account rate relief	4.61%	1.90%	0.00%	4.61%	1.90%	0.00%
2015 Side account rate relief	1.98%	1.98%	1.98%	1.98%	1.98%	1.98%
2027 Side account rate relief	0.00%	0.00%	0.00%	8.54%	8.54%	8.54%
Side Account Rate Credit	**6.59%**	**3.88%**	**1.98%**	**15.13%**	**12.42%**	**10.52%**
Employer Contribution Rate, Tier 1/Tier 2	**21.43%**	**25.46%**	**27.36%**	**12.89%**	**16.92%**	**18.82%**
Employer Contribution Rate, OPSRP	**18.25%**	**22.75%**	**24.65%**	**9.71%**	**14.21%**	**16.11%**
Existing Pension Bond Debt Service	6.49%	3.89%	1.31%	6.49%	3.89%	1.31%
New Pension Bond Debt Service	0.00%	0.00%	0.00%	7.64%	7.64%	7.64%
Pension Bond Debt Service	**6.49%**	**3.89%**	**1.31%**	**14.13%**	**11.53%**	**8.95%**
Net Employer Contribution Rate, Tier 1/Tier 2	**27.92%**	**29.35%**	**28.67%**	**27.03%**	**28.45%**	**27.77%**
Net Employer Contribution Rate, OPSRP	**24.74%**	**26.64%**	**25.96%**	**23.85%**	**25.74%**	**25.06%**

SA rate relief shown in FY 2028 for 2005 SA is annualized calculation of projected remaining SA balance. Actual credit will be applied in lump sum during Summer of 2027.

1) Base Case Scenario assumed borrowing rate of 4.75% for New Pension Bond Debt Service.
2) Assumes Employer payroll grows at 3.40% annually. To the extent higher or lower growth is experienced, results will differ.
3) Net Employer Contribution Rates are effective payroll rate after payment of debt.
4) Employer Contribution Rates are effective payroll rate after affect of Senate Bill 849.

POBs take a while to complete…

Many additional steps to issue POBs vs. Capital Bonds:

- **Extra education of all stakeholders to discuss risks. IN PROCESS**
- ✓ **Statistical assessment required. DONE**
- **Legal documentation, including:**
  - **Borrowing Resolutions.**
  - **Intercept and Trust Agreements for pools.**
  - **Disclosure document.**
- **Request to Milliman to calculate payoff amounts. Base cost is $1,000, plus $250 for each payoff date selected.**
- **Bond Rating.**
- **If market cooperates, sale and closing.**
- **Send funds to PERS. Payroll rates generally reduced immediately.**



Can take 9-12 months from start to finish.

What about fees?

- Most fees do not take effect until and unless bonds are sold.
- Fees that could be incurred regardless include:
  - ✓ ECONorthwest Assessment Fee (~$2,500) DONE
  - Milliman calculation fee (~$2,500)
  - Rating fee. Fee is incurred once rating is assigned, but there is grace period. Amount TBD based on bond size (and number of participants in a pool).
- Overall fees vary by amount of issue, number of participants, general market conditions. We are estimating ~1.50% for underwriting, legal, trustee, rating and miscellaneous fees.

Potential Timeline – SD and CC Bond Pools

September

- ✓ By September 14: Districts notify Piper/Hawkins if want resolution, max TIC. DONE
- ✓ September 23: Zoom meeting to review next steps. DONE

October

- 2025 Valuation released

November

- By November 13: Districts adopt resolutions, publish assessment.
- November 16: Market Update Zoom - proceed or pause decision
- After November 16: If conditions are favorable, Districts send payoff requests to Milliman.

Potential Timeline – SD and CC Bond Pools

December 2026

- Finalize documentation: disclosure, trust, intercept agreements.
- Rating and due diligence process.

January 2027

- Receive payoff letters from Milliman
- Final Opt-in forms to Piper
- Week of January 18 - Bond sale for CCs
- Week of January 25 - Bond sale for SDs

February 2027

- Week of Feb 8th - Bond closing for CCs
- Week of Feb 15th – Bond closing for SDs
- Funds sent to PERS no later than Feb 25
- March 1, 2027 – Payroll rates reduced

Concluding Thoughts

- POBs can be an effective tool for reducing pension costs, but they are risky.
- SAs and POBs introduce more volatility for borrowers.
- Volatility can cause cash flow issues, even when savings are positive.
- Assessment results suggest achieving success with POB is potentially within reach.
- Current interest rates are higher than assessed levels, but may decline should national and international events stabilize.
- Given long lead time on a POB issue, it may make sense to get ready and wait for market conditions to improve.

Questions



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ITEM FOR INFORMATION

DIVISION 22 STANDARDS ASSURANCES

SUMMARY
Division 22 is a section of the Oregon Administrative Rules that outlines Oregon's standards for elementary and secondary schools. School districts are required to present the results of an internal audit of the standards each fall.

BACKGROUND
Division 22 of the Oregon Administrative Rules outlines the baseline standards that all public school districts must meet to be recognized as a standard school district. These rules, adopted by the Oregon State Board of Education or enacted by the Legislature, are part of Chapter 581, which governs the work of the Oregon Department of Education. Division 22 includes over 50 individual rules covering areas such as instructional time, curriculum, student support services, educator evaluation and school climate. These standards are designed to ensure that every student in Oregon receives a consistent and equitable educational experience, regardless of where they attend school.

Each year, school districts are required to review their compliance with Division 22 and submit assurances to the Oregon Department of Education by November 1. This process includes certifying compliance or identifying areas where corrective action is needed, presenting a public report to the school board, and posting the report on the district website. The process is intended to promote transparency, accountability and alignment with Oregon's educational priorities.

The district is in compliance with 57 of the 58 standards required for the 2025-26 school year. Corrective action plans are in place for the remaining standard, and we do not anticipate any issues with the implementation. Details regarding the compliance status of each item, as well as the corrective action plan, are included in the report to the community.

RECOMMENDATION
Staff will present information on the district's compliance with Division 22 standards for the 2025–26 school year. No action is needed.

Beaverton School District does not discriminate in any programs or activities 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.

Compliance with Public School Standards

Division 22 Assurances for 2025-26 School Year

October 13, 2026

Veronica Galvan, *Curriculum, Instruction, & Assessment Administrator*
Kristie Hauss, *Accountability Specialist*

What are Public School Standards?

- Chapter 581, Division 22
- Standards for elementary and secondary schools
- Required for district to be a standard school district
- Oregon Department of Education required by legislation to enforce the standards

Why Division 22 matters?

- Applies to all students across the state
- Not the only requirements, but foundational
- Ensures consistent educational service
- Promotes equity and access

Priorities for
STUDENT SUCCESS

Division 22 Rules Categories

High-quality learning experiences

Aligned & focused educational systems

Engaged partners & communities

Safe & inclusive schools

Committed & supported staff

Division 22 standards include over 50 rules

[Oregon's Reimagined Accountability Framework]

Division 22 Rules Snapshot



What are Standards Assurances?

Each rule is reviewed by the district

Determination:

- In Compliance
- Out of Compliance
  - » Explanation required
  - » Corrective action plan submitted to ODE

Compliance for the 2025-26 School Year



- **57 of 58 standards are in compliance**
- **Corrective action on schedule**
  - Science adoption to be completed 2026-27
- **Instructional Materials Postponement notification to be submitted**
  - Materials will be adopted within state allowed postponement timeframe
    - Health materials to be adopted 2026-27
    - Social sciences materials to be adopted 2026-27

Next Steps

- **November 1, 2026**
  Report on compliance made available on BSD website
- **November 15, 2026**
  BSD submits assurances to ODE
- **January 2027**
  ODE reviews all submissions and follows up as necessary
- **Ongoing**
  Review requirements to ensure future compliance



THANK YOU

What questions do you have?

Beaverton School District #48J
Report on Compliance with Public School Standards
2025-26 School Year

By November 1 of each year, school district superintendents are required by OAR 581-022-2305: District Assurances of Compliance with Public School Standards to report to their community on the district's status with respect to all of the Standards for Public Elementary and Secondary Schools. The Standards are adopted by the State Board of Education and set out in Oregon Administrative Rules Chapter 581, Division 22.

The table below contains 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 during the 2025-26 school year. 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. The corrective action must be approved by ODE and completed by the district by the beginning of the 2027-28 school year.

What are the requirements of the standards? For a general overview of what each rule/standard requires, consult this high-level Rules at a Glance summary. For specific, comprehensive requirements, use the links below for each individual rule.

Category: High-Quality Learning Experiences for All Students

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2000 Diploma Requirements	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2010 Modified Diploma	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2015 Extended Diploma	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2020 Certificate of Attendance	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2050 Human Sexuality Education	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2055 Career Education	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2263 Physical Education Requirements *Elementary Grades	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2263 Physical Education Requirements *Middle Grades	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2340 Media Programs	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2350 Independent Adoptions of Instructional Materials	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2355 Instructional Materials Adoption	**Implementing Corrective Action** **Forecasted in compliance for 2027-2028**	Science curriculum adoption behind 2023 state adoption schedule	Science curriculum to be adopted during 2026-2027 for implementation fall 2027
581-022-2360 Postponement of Purchase of State-Adopted Instructional Materials	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2440 Teacher Training Related to Dyslexia	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2500 Programs and Services for TAG Students- **Sections (1) and (2) TAG Plan Requirements**	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2500 Programs and Services for TAG Students – **Sections (3) and (4): Instruction Requirements**	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2505 Alternative Education Programs	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Category: Aligned and Focused Educational Systems

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2025 Credit Options	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2030 District Curriculum	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2060 Comprehensive School Counseling	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2100 Administration of State Assessments	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2110 Exception of Students with Disabilities from State Assessments	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2115 Assessment of Essential Skills: Diploma Requirements	**Waived through the end of 2027-28 school year**	Not applicable	Not applicable
581-022-2115(2) Assessment of Essential Skills: Local Performance Assessment Requirement	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2120 Essential Skill Assessments for English Language Learners	**Waived through the end of 2027-28 school year**	Not applicable	Not applicable
581-022-2250 District Improvement Plan	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2260 Records and Reports	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2265 Report on PE Data	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2300 Standardization	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2305 District Assurances of Compliance with Public School Standards	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2315 Special Education for Children with Disabilities	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2320 Required Instructional Time	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2323 Preserving Student Instructional Time	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2325 Identification of Academically Talented and Intellectually Gifted Students	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2335 Daily Class Size	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2400 Personnel	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2445 Universal Screenings for Risk Factors of Dyslexia	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Category: Engaged Partners and Communities

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2005 Veterans Diploma	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2255 School and District Performance Report Criteria	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2270 Individual Student Assessment, Recordkeeping and Reporting	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2307 Educational Equity Advisory Committees	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2330 Rights of Parents of TAG Students	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2370 Complaint Procedures	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Category: Safe & Inclusive Schools

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2045 Substance Use Prevention and Intervention Plan	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2205 Policies on Reporting of Child Abuse	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2210 Anabolic Steroids and Performance Enhancing Substances	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2215 Safety of School Sports – Concussions	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2220 Health Services	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2223 Healthy and Safe Schools Plan	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2225 Emergency Plans and Safety Programs	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2230 Asbestos Management Plans	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2267 Annual Report on Restraint and Seclusion	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2308 Agreements Entered Into with Voluntary Organizations	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2310 Equal Education Opportunities	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2312 Every Student Belongs	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2345 Auxiliary Services	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2430 Fingerprinting of Subject Individuals in Positions Not Requiring Licensure as Teachers, Administrators, Personnel Specialists, School Nurses	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2510 Suicide Prevention Plan	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2515 Menstrual Dignity for Students	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

Category: Committed and Supportive Staff

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2405 Personnel Policies	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2410 Teacher and Administrator Evaluation and Support	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2415 Core Teaching Standards	**In compliance**	The district has met all of the requirements for this rule.	Not applicable
581-022-2420 Educational Leadership - Administrator Standards	**In compliance**	The district has met all of the requirements for this rule.	Not applicable

ITEM FOR INFORMATION

MONTHLY FINANCIAL UPDATE

SUMMARY
The financial update is provided monthly and includes the general fund activity and forecast; a summary of revenues, expenditures and encumbrances for all other funds; a report on classroom teacher staffing by school; and information on investment activity as required by policy.

BACKGROUND
Attached is the financial report for September 2026:

- General fund activity and forecast
- Summary of revenue, expenditures and encumbrances for all funds except general fund
- 2026-27 classroom teacher staffing by school as of September 30, 2026
- Investment monthly board report as of September 28, 2026
- Investment portfolio – allocation by asset category, main fund, asset class
- Portfolio holdings by asset class

NOTES:

- While it is still early in the school year, there have been some changes to the current forecast in the area of salaries, benefits and supplies and materials. Projected salary and benefit costs have been increased, due to the continued higher substitute usage that was mentioned in the spring. Staff will continue to monitor substitute usage patterns in collaboration with the Human Resources Department and refine projections as needed. The supplies and materials projection has been reduced based on current projections and previous trends. The overall general fund forecast remains on track with the adopted budget.
- The next revenue forecast will be released on November 18. This will be a key indicator for state school fund allocations as it will be used to build the governor's recommended budget. The governor will release the 2027-2029 budget proposal in the first week of December.

RECOMMENDATION
Staff will present the monthly financial update for the board to receive and discuss. No action is needed.

Beaverton School District does not discriminate in any programs or activities 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.

Beaverton School District
Year-To-Date Activity and Forecast
General Fund
For September 2026

($ in millions)

	YTD Actuals	Current Encumb.	Actuals & Encumb.	2026-27 Budget	Year-End Forecast	Variance
REVENUES:						
State School Fund	$ 114.8	$ -	$ 114.8	$ 557.4	$ 557.4	$ -
Local Option Levy	-	-	-	44.5	44.5	-
Investment Earnings	1.1	-	1.1	8.0	8.0	-
NWRESD Appointment	-	-	-	14.5	14.5	-
Other	0.3	-	0.3	5.7	5.7	-
Total Revenues	$ 116.2	$ -	$ 116.2	$ 630.1	$ 630.1	$ -
EXPENDITURES:						
Salaries	$ 59.7	$ -	$ 59.7	$ 360.3	$ 361.3	$ 1.0
Benefits	35.8	-	35.8	214.9	215.9	1.0
Purchased services	12.1	11.2	23.3	44.3	44.3	-
Supplies & materials	5.3	2.8	8.1	21.5	19.5	(2.0)
Capital outlay	-	0.1	0.1	0.4	0.4	-
Other	1.5	0.1	1.6	2.9	2.9	-
Transfers out	2.4	-	2.4	2.4	2.4	-
Total Expenditures	$ 116.8	$ 14.2	$ 131.0	$ 646.7	$ 646.7	$ -
Surplus / (Deficit) from Operations				**$ (16.6)**	**$ (16.6)**	$ -

Projected Ending Fund Balance	2026-27 Budget	Year-End Forecast
Beginning Fund Balance	$ 150.3	$ 141.6
Surplus / (Deficit) from Operations	(16.6)	(16.6)
Contingency	67.0	-
Unappropriated Ending Fund Balance	66.7	-
Projected Ending Fund Balance	$ -	$ 125.0
Projected Ending Fund Balance as Percentage of Total Expenditures		19.3%

	YTD Actuals	Current Encumb.	Actuals & Encumb.	Final Budget	Year-End Forecast	Variance
APPROPRIATIONS:						
Instruction	$ 65.2	$ 7.2	$ 72.4	$ 399.3	$ 399.3	$ -
Support Services	48.1	7.0	55.1	243.2	243.2	-
Enterprise & Community Svc	-	-	-	0.3	0.3	-
Facilities Acquisition & Const	-	-	-	0.1	0.1	-
Other Uses	3.5	-	3.5	3.8	3.8	-
Contingencies	-	-	-	67.0	67.0	-
Unappropriated EFB	-	-	-	66.7	66.7	-
Total	$ 116.8	$ 14.2	$ 131.0	$ 780.4	$ 780.4	$ -

Beaverton School District
Summary of Revenue, Expenditures and Encumbrances
All Funds Except General Fund
For September 2026

Funds	Final Budget (incl Beg Fund Bal)	YTD Revenue (incl Beg Fund Bal)	YTD Expenditures (Incl transfers out)	Encumb.	YTD Expenditures & Encumb.	Percent	Fund Balance
Grant Fund	$ 79,875,209	$ -	$ 13,566,061	$ 6,653,988	$ 20,220,049	25.31%	$ (20,220,049)
Special Purpose Fund	13,619,680	7,246,326	727,075	858,354	1,585,429	11.64%	5,660,897
Equipment Replacement Fund	11,540,544	11,677,179	718,564	3,198,075	3,916,640	33.94%	7,760,539
Scholarship Fund	550,000	608,327	146,750	10,000	156,750	28.50%	451,577
Long-Term Planning Fund	42,550,000	42,270,348	-	-	-	0.00%	42,270,348
Nutrition Services Fund	28,941,694	5,624,232	3,095,175	7,968,628	11,063,804	38.23%	(5,439,571)
Debt Service Fund	124,610,999	16,917,132	-	-	-	0.00%	16,917,132
Capital Projects Fund	303,260,000	278,083,598	48,871,165	105,995,975	154,867,140	51.07%	123,216,458
Insurance Reserve Fund	14,188,892	12,662,070	2,782,538	3,620,194	6,402,732	45.12%	6,259,338
Workers' Compensation Fund	6,141,169	3,871,685	783,324	160,575	943,899	15.37%	2,927,786
Total	$ 625,278,187	$ 378,960,898	$ 70,690,653	$ 128,465,789	$ 199,156,443		$ 179,804,455

BEAVERTON SCHOOL DISTRICT

2026-27 Classroom Teacher Staffing By School
As of 9/30/26

School	Budgeted Enrollment	9/30/26 Enrollment	Enrollment Change	Budgeted FTE General Fund	Budgeted FTE Levy	Budgeted FTE SIA/HSS	Budgeted FTE TOTAL	Actual FTE General Fund	Actual FTE Levy	Actual FTE SIA/HSS	Actual FTE TOTAL
Aloha Huber (K-8)	874	830	(44)	26.0	7.0	2.0	35.0	26.0	7.0	2.0	35.0
Barnes	382	369	(13)	12.0	3.0	2.0	17.0	12.0	3.0	2.0	17.0
Beaver Acres	644	648	4	20.0	6.0	2.0	28.0	20.0	6.0	2.0	28.0
Bethany	383	397	14	12.0	3.0	2.0	17.0	12.0	3.0	2.0	17.0
Bonny Slope	586	586	-	16.0	5.0	2.0	23.0	16.0	5.0	2.0	23.0
Cedar Mill	348	359	11	9.0	3.0	3.0	15.0	9.0	3.0	3.0	15.0
Chehalem	339	338	(1)	9.0	3.0	3.0	15.0	9.0	3.0	3.0	15.0
Cooper Mountain	358	370	12	10.0	3.0	2.0	15.0	10.0	3.0	2.0	15.0
Elmonica	420	417	(3)	13.0	4.0	2.0	19.0	13.0	4.0	2.0	19.0
Errol Hassell	266	266	-	7.0	2.0	2.0	11.0	7.0	2.0	2.0	11.0
Findley	477	519	42	15.0	4.0	2.0	21.0	15.0	4.0	2.0	21.0
Fir Grove	323	329	6	10.0	3.0	1.0	14.0	10.0	3.0	1.0	14.0
FLEX (K-5)	68	49	(19)	3.0			3.0	3.0			3.0
Greenway	351	349	(2)	10.0	3.0	3.0	16.0	10.0	3.0	3.0	16.0
Hazeldale	537	512	(25)	15.0	5.0	2.0	22.0	15.0	5.0	2.0	22.0
Hiteon	459	456	(3)	14.0	4.0	2.0	20.0	14.0	4.0	2.0	20.0
Jacob Wismer	516	496	(20)	15.0	4.0	2.0	21.0	15.0	4.0	2.0	21.0
Kinnaman	403	406	3	13.0	3.0	2.0	18.0	13.0	3.0	2.0	18.0
McKinley	633	671	38	19.0	5.0	2.0	26.0	19.0	5.0	2.0	26.0
Montclair	262	264	2	8.0	2.0	1.0	11.0	8.0	2.0	1.0	11.0
Nancy Ryles	439	450	11	13.0	4.0	2.0	19.0	13.0	4.0	2.0	19.0
Oak Hills	405	425	20	12.0	3.0	2.0	17.0	12.0	3.0	2.0	17.0
Raleigh Hills	385	368	(17)	12.0	3.0	2.0	17.0	12.0	3.0	2.0	17.0
Raleigh Park	263	259	(4)	7.0	2.0	1.0	10.0	7.0	2.0	1.0	10.0
Ridgewood	339	342	3	10.0	3.0	1.0	14.0	10.0	3.0	1.0	14.0
Rock Creek	372	364	(8)	10.0	3.0	2.0	15.0	10.0	3.0	2.0	15.0
Sato	846	811	(35)	22.0	7.0	2.0	31.0	22.0	7.0	2.0	31.0
Scholls Heights	594	605	11	16.0	5.0	2.0	23.0	16.0	5.0	2.0	23.0
Sexton Mountain	391	399	8	11.0	3.0	2.0	16.0	11.0	3.0	2.0	16.0
Springville	687	677	(10)	19.0	5.0	2.0	26.0	19.0	5.0	2.0	26.0
Terra Linda	302	300	(2)	8.0	2.0	1.0	11.0	8.0	2.0	1.0	11.0
Vose	551	548	(3)	16.0	5.0	2.0	23.0	16.0	5.0	2.0	23.0
West TV	266	281	15	8.0	2.0	1.0	11.0	8.0	2.0	1.0	11.0
William Walker	470	455	(15)	14.0	4.0	2.0	20.0	14.0	4.0	2.0	20.0
Elementary School Total	**14,939**	**14,915**	**(24)**	**434.0**	**123.0**	**63.0**	**620.0**	**434.0**	**123.0**	**63.0**	**620.0**
Average Elementary School Staffing Ratio				**34.4**	**26.8**	**24.1**		**34.4**	**26.8**	**24.1**	

BEAVERTON SCHOOL DISTRICT

2026-27 Classroom Teacher Staffing By School
As of 9/30/26

School	Budgeted Enrollment	9/30/26 Enrollment	Enrollment Change	Budgeted FTE General Fund	Budgeted FTE Levy	Budgeted FTE SIA/HSS	Budgeted FTE TOTAL	Actual FTE General Fund	Actual FTE Levy	Actual FTE SIA/HSS	Actual FTE TOTAL
Cedar Park	626	634	8	21.4	5.3	0.5	27.2	21.3	5.3	0.5	27.2
Conestoga	775	739	(36)	26.6	6.7	0.7	33.9	26.5	6.7	0.7	33.8
Five Oaks	738	751	13	25.7	6.5	0.7	32.9	25.8	6.5	0.7	33.0
Highland Park	643	648	5	21.5	5.3	0.5	27.4	21.5	5.3	0.5	27.3
Meadow Park	648	632	(16)	24.4	6.0	0.7	31.1	23.5	6.0	0.7	30.2
Mountain View	724	741	17	27.4	6.7	0.7	34.7	26.3	6.7	0.7	33.7
Stoller	1,096	1,065	(31)	34.6	8.9	0.8	44.3	34.5	8.9	0.8	44.2
Tumwater	959	976	17	30.2	7.5	0.8	38.6	30.2	7.5	0.8	38.6
Whitford	739	736	(3)	25.7	6.3	0.7	32.7	24.8	6.3	0.7	31.8
Middle School Total	**6,948**	**6,922**	**(26)**	**237.5**	**59.3**	**6.0**	**302.8**	**234.5**	**59.2**	**6.0**	**299.8**
Average Middle School Staffing Ratio				**29.3**	**23.4**	**22.9**		**29.5**	**23.6**	**23.1**	
Aloha	1,488	1,445	(43)	55.6	11.4	2.2	69.2	50.9	11.4	2.2	64.5
Beaverton	1,353	1,354	1	53.0	10.2	4.2	67.4	52.9	10.2	4.2	67.3
Mountainside	1,875	1,762	(113)	56.0	12.2	1.6	69.8	53.1	12.2	1.6	66.9
Southridge	1,238	1,229	(9)	42.4	9.0	3.0	54.4	42.4	9.0	3.0	54.4
Sunset	1,688	1,702	14	52.6	11.0	2.6	66.2	51.9	11.0	2.2	65.1
Westview	2,370	2,427	57	77.1	16.4	2.7	96.2	77.1	16.4	2.7	96.2
High School Total	**10,012**	**9,919**	**(93)**	**336.7**	**70.2**	**16.3**	**423.2**	**328.3**	**70.2**	**15.9**	**414.4**
Average High School Staffing Ratio				**29.7**	**24.6**	**23.7**		**30.2**	**24.9**	**23.9**	
Arts & Communication Magnet Academy (6-12)	687	683	(4)	24.2	5.0	0.5	29.7	23.4	5.0	0.5	28.9
Beaverton Academy of Science and Engineering (6-12)	852	860	8	30.4	6.3	0.5	37.2	30.2	6.3	0.5	37.1
Community School (9-12)	133	144	11	6.8	1.2	1.2	9.2	6.8	1.2	1.2	9.2
FLEX Online School (6-12)	317	311	(6)	18.8	1.8	0.8	21.4	18.7	1.8	0.8	21.3
International School of Beaverton (6-12)	860	856	(4)	30.4	6.2	0.5	37.1	30.4	6.2	0.5	37.0
Options Schools Total	**2,849**	**2,854**	**5**	**110.6**	**20.5**	**3.5**	**134.6**	**109.5**	**20.5**	**3.5**	**133.5**
Average Options Staffing Ratio				**25.8**	**21.7**	**21.2**		**26.1**	**21.9**	**21.4**	
Address Extreme Class Size K-12	**-**	**-**	**-**	**11.4**	**-**	**-**	**11.4**	**-**	**-**	**-**	**-**
District Total	**34,748**	**34,610**	**(138)**	**1,130.1**	**273.0**	**88.8**	**1,492.0**	**1,106.3**	**273.0**	**88.4**	**1,467.7**

Note: Enrollment includes general education student projections plus specialized program students for elementary and general education student projections plus ALC, EGC,and SCC students for secondary. Classroom teachers are budgeted based on a staffing ratio found in the Staffing Allocation Methodology (SAM) on pages 224-248 in the 2026-27 Adopted Budget Document. Elementary music and PE specialists are not included in the classroom teacher allocations. Secondary AVID, CTE, Dual Language & Specialized Program Elective teachers not allocated by the classroom teacher ratio are included.

Postings for open positions are also not included in this report. This report represents actual filled positions.

BEAVERTON SCHOOL DISTRICT | OREGON
Monthly Board Report
09/28/2026

COMPLIANCE | Beaverton School District, Prepared by Business Office

This monthly investment report is in compliance, in accordance with the Board Policy DFA - Investment of Funds.

Asset Category	Face Amount/Shares	Market Value	Book Value	% of Portfolio	YTM @ Cost	Days To Maturity
Corporate Bonds 35%	55,000,000.00	54,570,363.70	54,601,095.84	14.13	3.99	67
LGIP | Limit $ 65,463,000	55,969,926.11	55,969,926.11	55,969,926.11	14.48	4.10	1
US Agency 100%	35,000,000.00	34,487,600.00	34,549,390.96	8.94	3.87	158
US Treasury 100%	246,000,000.00	240,392,360.00	241,418,988.38	62.46	3.78	184
Total / Average	**391,969,926.11**	**385,420,249.81**	**386,539,401.29**	**100.00**	**3.86**	**139**

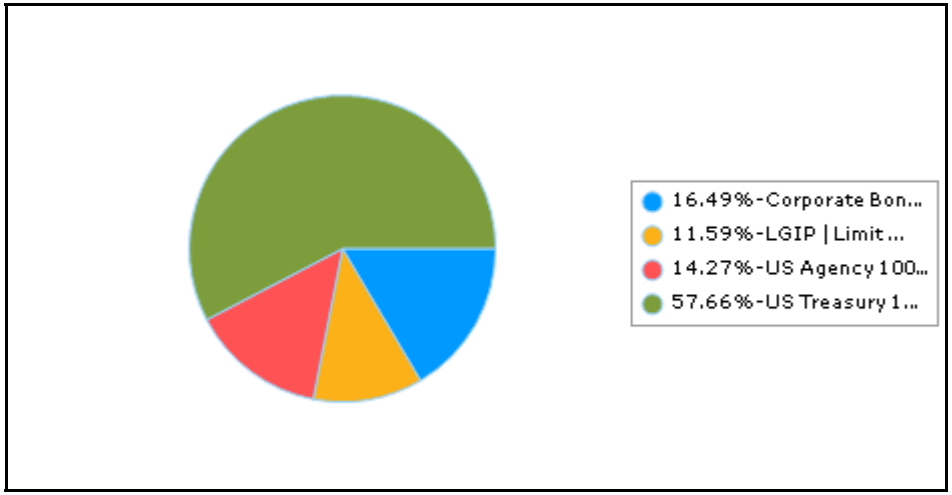
Beaverton School District
Distribution by Asset Category - Market Value

Begin Date: 8/31/2026, End Date: 9/28/2026

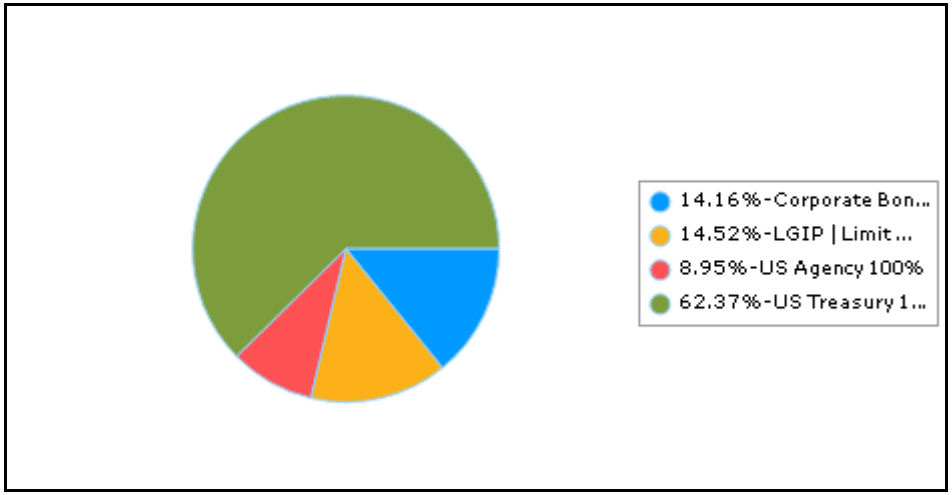
Asset Category Allocation

Asset Category	Market Value 8/31/2026	% of Portfolio 8/31/2026	Market Value 9/28/2026	% of Portfolio 9/28/2026
Corporate Bonds 35%	74,382,537.30	16.49	54,570,363.70	14.16
LGIP | Limit $ 65,463,000	52,276,062.02	11.59	55,969,926.11	14.52
US Agency 100%	64,389,550.00	14.27	34,487,600.00	8.95
US Treasury 100%	260,150,480.00	57.66	240,392,360.00	62.37
Total / Average	**451,198,629.32**	**100.00**	**385,420,249.81**	**100.00**

Portfolio Holdings as of 8/31/2026



Portfolio Holdings as of 9/28/2026



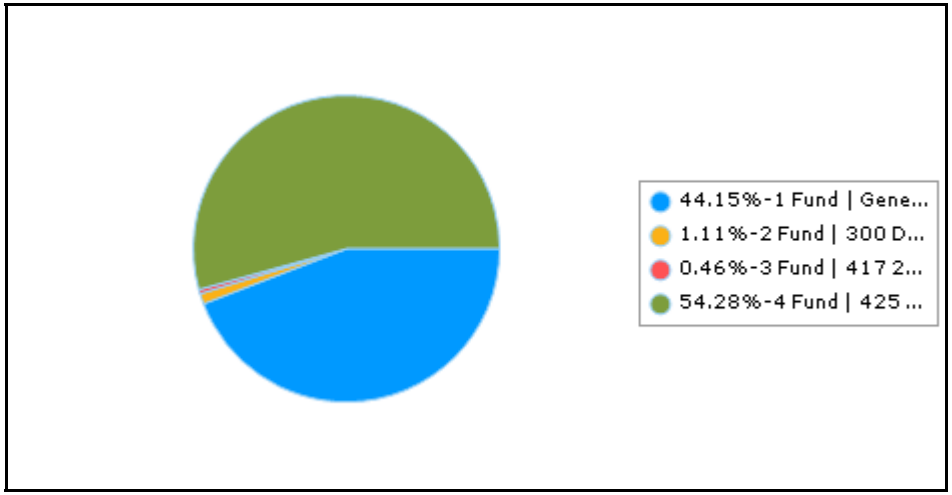
Beaverton School District
Distribution by Main Fund - Market Value

Begin Date: 8/31/2026, End Date: 9/28/2026

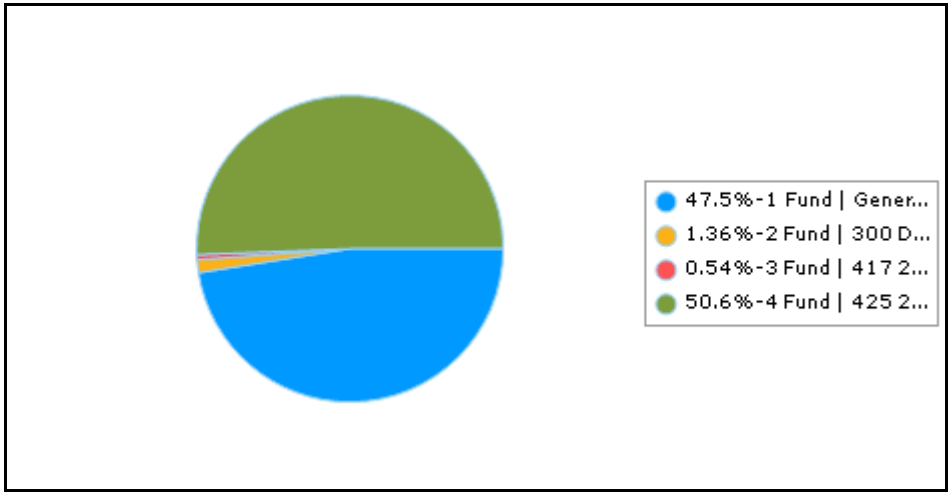
Main Fund Allocation

Main Fund	Market Value 8/31/2026	% of Portfolio 8/31/2026	Market Value 9/28/2026	% of Portfolio 9/28/2026
1 Fund | General Fund	199,199,727.81	44.15	183,079,220.31	47.50
2 Fund | 300 Debt Service	5,012,460.92	1.11	5,247,427.71	1.36
3 Fund | 417 2017 Bond Tax	2,072,084.20	0.46	2,072,084.20	0.54
4 Fund | 425 2025 Bond Issue	244,914,356.39	54.28	195,021,517.59	50.60
Total / Average	**451,198,629.32**	**100.00**	**385,420,249.81**	**100.00**

Portfolio Holdings as of 8/31/2026



Portfolio Holdings as of 9/28/2026



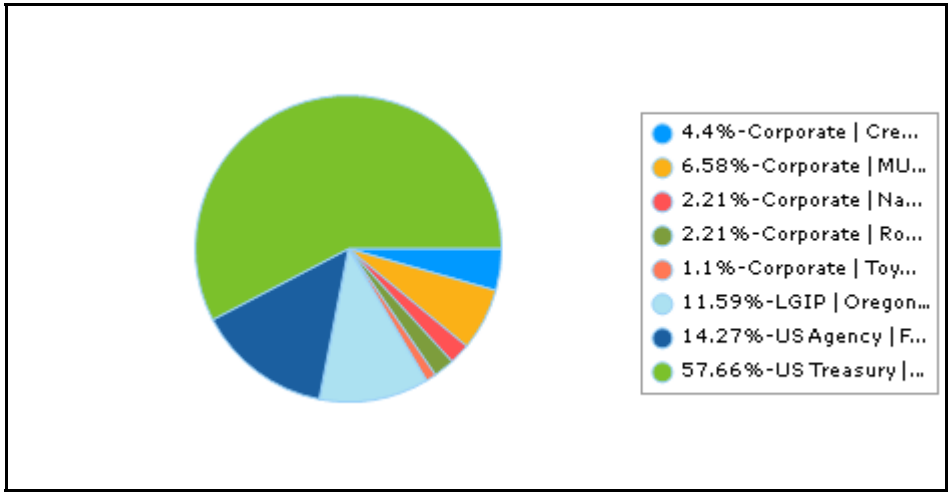
Beaverton School District
Distribution by Asset Class - Market Value

Begin Date: 8/31/2026, End Date: 9/28/2026

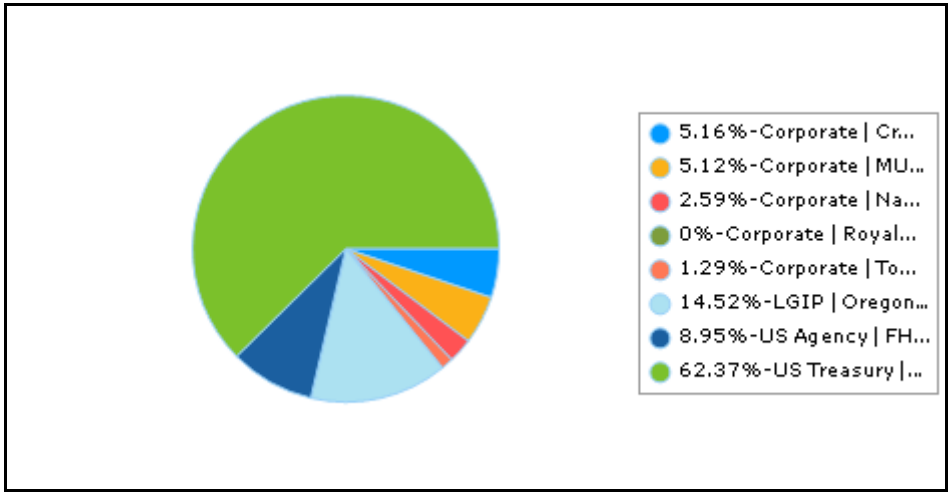
Asset Class Allocation

Asset Class	Market Value 8/31/2026	% of Portfolio 8/31/2026	Market Value 9/28/2026	% of Portfolio 9/28/2026
Corporate | Credit Agricole	19,832,300.00	4.40	19,886,944.40	5.16
Corporate | MUFG Bank LTD	29,673,284.60	6.58	19,749,886.00	5.12
Corporate | Natixis Bank NY	9,951,444.40	2.21	9,980,200.00	2.59
Corporate | Royal Bank Canada	9,984,458.30	2.21	0.00	0.00
Corporate | Toyota	4,941,050.00	1.10	4,953,333.30	1.29
LGIP | Oregon State	52,276,062.02	11.59	55,969,926.11	14.52
US Agency | FHLB	64,389,550.00	14.27	34,487,600.00	8.95
US Treasury | Bill - Slug	260,150,480.00	57.66	240,392,360.00	62.37
Total / Average	**451,198,629.32**	**100.00**	**385,420,249.81**	**100.00**

Portfolio Holdings as of 8/31/2026



Portfolio Holdings as of 9/28/2026



Beaverton School District
Portfolio Holdings by Asset Class

Date: 9/28/2026

Description CUSIP	Face Amount / Shares	Settlement Date YTM @ Cost	Cost Value Book Value	Market Price YTM @ Market	Market Value Accrued Interest	% Portfolio Unre. Gain/Loss	Credit Rating Credit Rating	Days To Call/Maturity Duration To Maturity
Corporate | Credit Agricole								
Credit Agricole CIB NY 0 11/17/2026		3/23/2026	19,480,838.89	99.43	19,886,944.40	5.15%	S&P-A+	50
22533ULH4	20,000,000.00	4.01	19,891,388.89	4.09	0.00	-4,444.49	Moodys-A1	0.14
			19,480,838.89		**19,886,944.40**	**5.15%**		**50**
Sub Total Corporate | Credit Agricole	**20,000,000.00**	**4.01**	**19,891,388.89**	**4.09**	**0.00**	**-4,444.49**		**0.14**
Corporate | MUFG Bank LTD								
MUFG Bank LTD 0 1/13/2027		5/29/2026	9,753,188.89	98.72	9,872,491.60	2.56%	S&P-A	107
62479MND1	10,000,000.00	3.98	9,884,677.78	4.35	0.00	-12,186.18	Moodys-A1	0.29
MUFG Bank LTD 0 12/14/2026		3/23/2026	4,857,025.00	99.10	4,955,083.30	1.28%	S&P-A	77
62479MME0	5,000,000.00	3.98	4,958,612.50	4.24	0.00	-3,529.20	Moodys-A1	0.21
MUFG Bank LTD 0 2/3/2027		7/30/2026	4,894,250.00	98.45	4,922,311.10	1.27%	S&P-A	128
62479MP31	5,000,000.00	4.14	4,928,000.00	4.44	0.00	-5,688.90	Moodys-A1	0.35
			19,504,463.89		**19,749,886.00**	**5.11%**		**105**
Sub Total Corporate | MUFG Bank LTD	**20,000,000.00**	**4.02**	**19,771,290.28**	**4.34**	**0.00**	**-21,404.28**		**0.28**
Corporate | Natixis Bank NY								
Natixis NY 0 10/16/2026		3/23/2026	9,778,625.00	99.80	9,980,200.00	2.58%	S&P-A+	18
63873KKG1	10,000,000.00	3.94	9,980,750.00	3.97	0.00	-550.00	Moodys-A1	0.05
			9,778,625.00		**9,980,200.00**	**2.58%**		**18**
Sub Total Corporate | Natixis Bank NY	**10,000,000.00**	**3.94**	**9,980,750.00**	**3.97**	**0.00**	**-550.00**		**0.05**
Corporate | Toyota								
Toyota Motor Credit Corp 0 12/17/2026		4/23/2026	4,874,058.33	99.07	4,953,333.30	1.28%	S&P-A+	80
89233HMH4	5,000,000.00	3.91	4,957,666.67	4.24	0.00	-4,333.37	Moodys-A1	0.22
			4,874,058.33		**4,953,333.30**	**1.28%**		**80**
Sub Total Corporate | Toyota	**5,000,000.00**	**3.91**	**4,957,666.67**	**4.24**	**0.00**	**-4,333.37**		**0.22**
LGIP | Oregon State								
Oregon State LGIP		6/30/2026	1,269,987.71	100.00	1,269,987.71	0.33%	NR	1
LGIP 300	1,269,987.71	4.10	1,269,987.71	4.10		0.00	NR	0

Beaverton School District
Portfolio Holdings by Asset Class

Date: 9/28/2026

Description CUSIP	Face Amount / Shares	Settlement Date YTM @ Cost	Cost Value Book Value	Market Price YTM @ Market	Market Value Accrued Interest	% Portfolio Unre. Gain/Loss	Credit Rating Credit Rating	Days To Call/Maturity Duration To Maturity
Oregon State LGIP		6/30/2026	49,027,906.61	100.00	49,027,906.61	12.68%	NR	1
LGIP 100	49,027,906.61	4.10	49,027,906.61	4.10		0.00	NR	0
Oregon State LGIP		6/30/2026	3,599,947.59	100.00	3,599,947.59	0.93%	NR	1
LGIP 425	3,599,947.59	4.10	3,599,947.59	4.10		0.00	NR	0
Oregon State LGIP		6/30/2026	2,072,084.20	100.00	2,072,084.20	0.54%	NR	1
LGIP 417	2,072,084.20	4.10	2,072,084.20	4.10		0.00	NR	0
			55,969,926.11		**55,969,926.11**	**14.48%**		**1**
Sub Total LGIP | Oregon State	**55,969,926.11**	**4.10**	**55,969,926.11**	**4.10**		**0.00**		**0**
US Agency | FHLB								
FHLB 0 2/16/2027		7/30/2026	24,454,229.17	98.40	24,600,500.00	6.37%	Moodys-Aa1	141
313384BY4	25,000,000.00	4.00	24,617,145.84	4.15	0.00	-16,645.84	S&P-AA+	0.39
FHLB 0 4/23/2027		4/27/2026	4,831,282.64	97.59	4,879,400.00	1.27%	S&P-AA+	207
313384ES4	5,000,000.00	3.48	4,903,256.25	4.30	0.00	-23,856.25	Moodys-Aa1	0.57
FHLB 4.75 4/9/2027		5/29/2026	5,047,050.00	100.15	5,007,700.00	1.3%	S&P-AA+	193
3130B0TY5	5,000,000.00	3.63	5,028,988.87	4.45	111,493.06	-21,288.87	Moodys-Aa1	0.52
			34,332,561.81		**34,487,600.00**	**8.94%**		**158**
Sub Total US Agency | FHLB	**35,000,000.00**	**3.87**	**34,549,390.96**	**4.21**	**111,493.06**	**-61,790.96**		**0.43**
US Treasury | Bill - Slug								
T-Bill 0 1/21/2027		5/29/2026	4,884,791.67	98.71	4,935,300.00	1.28%	S&P-AA+	115
912797TM9	5,000,000.00	3.63	4,944,097.22	4.16	0.00	-8,797.22	Moodys-Aa1	0.32
T-Bill 0 10/1/2026		2/24/2026	29,381,325.00	99.98	29,993,700.00	7.76%	S&P-AA+	3
912797SA6	30,000,000.00	3.51	29,991,525.00	2.56	0.00	2,175.00	Moodys-Aa1	0.01
T-Bill 0 11/19/2026		6/29/2026	3,941,370.00	99.44	3,977,440.00	1.03%	S&P-AA+	52
912797UZ8	4,000,000.00	3.80	3,978,680.00	3.98	0.00	-1,240.00	Moodys-Aa1	0.14
T-Bill 0 12/24/2026		5/29/2026	4,898,402.78	99.03	4,951,450.00	1.28%	S&P-AA+	87
912797TC1	5,000,000.00	3.62	4,957,708.33	4.11	0.00	-6,258.33	Moodys-Aa1	0.24

Beaverton School District
Portfolio Holdings by Asset Class

Date: 9/28/2026

Description CUSIP	Face Amount / Shares	Settlement Date YTM @ Cost	Cost Value Book Value	Market Price YTM @ Market	Market Value Accrued Interest	% Portfolio Unre. Gain/Loss	Credit Rating Credit Rating	Days To Call/Maturity Duration To Maturity
T-Bill 0 3/18/2027		4/27/2026	9,698,743.06	98.00	9,800,100.00	2.55%	S&P-AA+	171
912797UD7	10,000,000.00	3.49	9,841,492.50	4.35	0.00	-41,392.50	Moodys-Aa1	0.47
T-Bill 0 9/29/2026		6/29/2026	14,861,310.00	100.00	15,000,000.00	3.88%	S&P-AA+	1
912797VE4	15,000,000.00	3.70	14,998,492.50	0.00	0.00	1,507.50	Moodys-Aa1	0
T-Bill 0 9/29/2026		6/29/2026	9,906,466.70	100.00	10,000,000.00	2.59%	S&P-AA+	1
912797VE4	10,000,000.00	3.75	9,998,983.33	0.00	0.00	1,016.67	Moodys-Aa1	0
T-SLGS 0 10/15/2026		5/29/2025	9,474,600.00	99.83	9,982,600.00	2.58%	S&P-AA+	17
912821NH4	10,000,000.00	3.95	9,982,278.18	3.75	0.00	321.82	Moodys-Aa1	0.05
T-SLGS 0 11/15/2026		5/29/2025	9,446,900.00	99.47	9,946,600.00	2.57%	S&P-AA+	48
9128205Y9	10,000,000.00	3.93	9,950,376.08	4.12	0.00	-3,776.08	Moodys-Aa1	0.13
T-SLGS 0 11/15/2027		5/29/2025	18,212,200.00	94.87	18,974,600.00	4.96%	S&P-AA+	413
912833QB9	20,000,000.00	3.84	19,179,598.44	4.71	0.00	-204,998.44	Moodys-Aa1	1.13
T-SLGS 0 12/15/2026		5/29/2025	18,834,400.00	99.15	19,829,200.00	5.13%	S&P-AA+	78
912821NT8	20,000,000.00	3.92	19,839,085.31	4.04	0.00	-9,885.31	Moodys-Aa1	0.21
T-SLGS 0 2/15/2027		5/29/2025	23,401,250.00	98.40	24,600,500.00	6.38%	S&P-AA+	140
9128206P7	25,000,000.00	3.89	24,643,022.33	4.27	0.00	-42,522.33	Moodys-Aa1	0.38
T-SLGS 0 2/15/2028		5/29/2025	13,524,450.00	93.65	14,047,200.00	3.69%	S&P-AA+	505
912833RY8	15,000,000.00	3.85	14,248,837.95	4.81	0.00	-201,637.95	Moodys-Aa1	1.38
T-SLGS 0 5/15/2027		5/29/2025	23,206,750.00	97.26	24,315,500.00	6.32%	S&P-AA+	229
912833PD6	25,000,000.00	3.83	24,426,460.54	4.45	0.00	-110,960.54	Moodys-Aa1	0.63
T-SLGS 0 5/15/2028		5/29/2025	8,937,100.00	92.45	9,244,700.00	2.44%	S&P-AA+	595
912833WQ9	10,000,000.00	3.83	9,415,503.24	4.88	0.00	-170,803.24	Moodys-Aa1	1.63
T-SLGS 0 6/15/2027		5/29/2026	6,737,850.00	96.90	6,782,720.00	1.76%	S&P-AA+	260
912821PX7	7,000,000.00	3.68	6,821,573.30	4.47	0.00	-38,853.30	Moodys-Aa1	0.71

Beaverton School District
Portfolio Holdings by Asset Class

Date: 9/28/2026

Description CUSIP	Face Amount / Shares	Settlement Date YTM @ Cost	Cost Value Book Value	Market Price YTM @ Market	Market Value Accrued Interest	% Portfolio Unre. Gain/Loss	Credit Rating Credit Rating	Days To Call/Maturity Duration To Maturity
T-SLGS 0 8/15/2027		5/29/2025	22,989,500.00	96.04	24,010,750.00	6.26%	S&P-AA+	321
912833PE4	25,000,000.00	3.82	24,201,274.13	4.64	0.00	-190,524.13	Moodys-Aa1	0.88
			232,337,409.21		**240,392,360.00**	**62.46%**		**184**
Sub Total US Treasury | Bill - Slug	**246,000,000.00**	**3.78**	**241,418,988.38**	**3.71**	**0.00**	**-1,026,628.38**		**0.5**
			376,277,883.24		**385,420,249.81**	**100.00%**		**139**
TOTAL PORTFOLIO	**391,969,926.11**	**3.86**	**386,539,401.29**	**3.88**	**111,493.06**	**-1,119,151.48**		**0.38**

ITEM FOR INFORMATION

ANNUAL ENROLLMENT TREND REPORT FOR 2026-27 SCHOOL YEAR

SUMMARY
Staff will present an update on student enrollment and school capacity utilization for the 2026-27 school year.

BACKGROUND
Each school year on the final school day of September, Oregon school districts tabulate the enrollment totals for each grade level and school. These figures represent the district's official enrollment for the school year.

In March 2026 the school board approved long-range facility planning guidelines that included directing district staff to provide the board each fall with an annual enrollment trend report. The report should include enrollment counts by grade level, school capacity utilization data and an evaluation of how current enrollment is tracking against the district's 10-year enrollment forecast.

The attached memo and tables present the district's student enrollment, tracking against the 10-year forecast, and school capacity and utilization for the 2026-27 school year.

RECOMMENDATION
Staff will present the 2026 enrollment trend report and discuss next steps in long-range planning.

Beaverton School District does not discriminate in any programs or activities 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.

Annual Enrollment Trend Report 2026-2027 School Year

School Board Business Meeting

Tuesday, October 13, 2026

BEAVERTON SCHOOL DISTRICT

Annual Enrollment Summary

- On September 30th of each year the district tabulates enrollment totals for each grade level, school and program.
- The student count on this date represents the district's official enrollment for the school year.
- These figures serve as the basis for the next year's budget projection enrollment.

The detailed enrollment summary is included in your packet.



Enrollment: 2025 to 2026

Enrollment Summary

K-12 General Education	2025-26	2026-27	Change #	Change %
Elementary (K-5)	14,843	14,274	(569)	-3.83%
Middle School (6-8)	8,446	8,259	(187)	-2.21%
High School (9-12)	11,531	11,356	(175)	-1.52%
Total	**34,820**	**33,889**	**(931)**	**-2.67%**

Other Programs	2025-26	2026-27	Change #	Change %
Early College (EC)	297	290	(7)	-2.36%
Alternative Programs (AP)	96	74	(22)	-22.92%
Special Education Outside Placement (SP)	70	73	3	4.29%
Self-Contained Specialized Programs (SCSP)	984	1,025	41	4.17%
Charter Schools (Arco Iris & HOPE Chinese)	813	836	23	2.83%
Total	**2,260**	**2,298**	**38**	**1.68%**

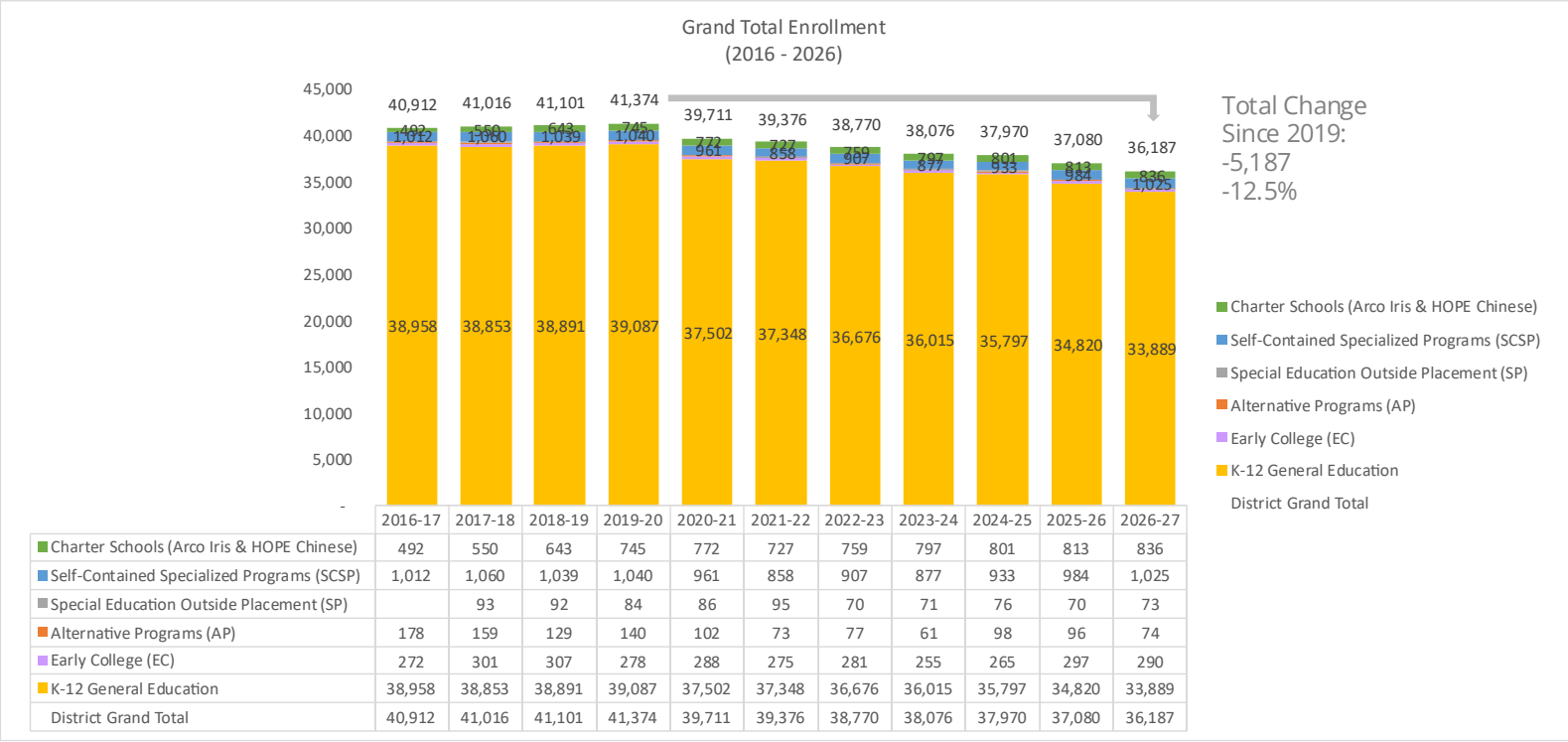
All Schools and Programs	2025-26	2026-27	Change #	Change %
Grand Total*	**37,080**	**36,187**	**(893)**	**-2.41%**

	2025-26	2026-27	Change #	Change %
Pre-Kindergarten (excluded from district totals)	417	409	(8)	-1.92%

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BEAVERTON SCHOOL DISTRICT

Grand Total Enrollment Since 2016



	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
Charter Schools (Arco Iris & HOPE Chinese)	492	550	643	745	772	727	759	797	801	813	836
Self-Contained Specialized Programs (SCSP)	1,012	1,060	1,039	1,040	961	858	907	877	933	984	1,025
Special Education Outside Placement (SP)		93	92	84	86	95	70	71	76	70	73
Alternative Programs (AP)	178	159	129	140	102	73	77	61	98	96	74
Early College (EC)	272	301	307	278	288	275	281	255	265	297	290
K-12 General Education	38,958	38,853	38,891	39,087	37,502	37,348	36,676	36,015	35,797	34,820	33,889
District Grand Total	40,912	41,016	41,101	41,374	39,711	39,376	38,770	38,076	37,970	37,080	36,187

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AP and SP program counts were combined until 2017

BEAVERTON SCHOOL DISTRICT

Grand Total Enrollment Since 2016

Pandemic

Change	16-17 to 17-18	17-18 to 18-19	18-19 to 19-20	19-20 to 20-21	20-21 to 21-22	21-22 to 22-23	22-23 to 23-24	23-24 to 24-25	24-25 to 25-26	25-26 to 26-27
K-12 General Education										
Elementary (K-5)	(271)	(130)	(45)	(1,310)	(114)	(196)	(295)	(115)	(754)	(569)
Middle School (6-8)	(2)	25	(32)	(328)	(97)	(363)	(119)	(35)	41	(187)
High School (9-12)	168	143	273	53	57	(113)	(247)	(68)	(264)	(175)
K-12 General Education	**(105)**	**38**	**196**	**(1,585)**	**(154)**	**(672)**	**(661)**	**(218)**	**(977)**	**(931)**
Other Programs										
Early College (EC)	29	6	(29)	10	(13)	6	(26)	10	32	(7)
Alternative Programs (AP)	(19)	(30)	11	(38)	(29)	4	(16)	37	(2)	(22)
Special Education Outside Placement (SP)	93	(1)	(8)	2	9	(25)	1	5	(6)	3
Self-Contained Specialized Programs (SCSP)	48	(21)	1	(79)	(103)	49	(30)	56	51	41
Charter Schools (Arco Iris & HOPE Chinese)	58	93	102	27	(45)	32	38	4	12	23
District Grand Total	**104**	**85**	**273**	**(1,663)**	**(335)**	**(606)**	**(694)**	**(106)**	**(890)**	**(893)**

Pandemic

% Change	16-17 to	17-18 to	18-19 to	19-20 to	20-21 to	21-22 to	22-23 to	23-24 to	24-25 to	25-26 to
K-12 General Education										
Elementary (K-5)	-1.50%	-0.73%	-0.25%	-7.43%	-0.70%	-1.21%	-1.84%	-0.73%	-4.83%	-3.83%
Middle School (6-8)	-0.02%	0.27%	-0.34%	-3.51%	-1.08%	-4.07%	-1.39%	-0.41%	0.49%	-2.21%
High School (9-12)	1.46%	1.22%	2.31%	0.44%	0.47%	-0.92%	-2.04%	-0.57%	-2.24%	-1.52%
K-12 General Education	**-0.27%**	**0.10%**	**0.50%**	**-4.06%**	**-0.41%**	**-1.80%**	**-1.80%**	**-0.61%**	**-2.73%**	**-2.67%**
Other Programs										
Early College (EC)	10.66%	1.99%	-9.45%	3.60%	-4.51%	2.18%	-9.25%	3.92%	12.08%	-2.36%
Alternative Programs (AP)	-10.67%	-18.87%	8.53%	-27.14%	-28.43%	5.48%	-20.78%	60.66%	-2.04%	-22.92%
Special Education Outside Placement (SP)			-8.70%	2.38%	10.47%	-26.32%	1.43%	7.04%	-7.89%	4.29%
Self Contained Special Education (SCSP)	4.74%	-1.98%	0.10%	-7.60%	-10.72%	5.71%	-3.31%	6.39%	5.47%	4.17%
Charter Schools (Arco Iris & HOPE Chinese)	11.79%	16.91%	15.86%	3.62%	-5.83%	4.40%	5.01%	0.50%	1.50%	2.83%
District Grand Total	**0.25%**	**0.21%**	**0.66%**	**-4.02%**	**-0.84%**	**-1.54%**	**-1.79%**	**-0.28%**	**-2.34%**	**-2.41%**

82

AP and SP program counts were combined until 2017

K-12 General Education Projected vs. Actual

Projection Summary

K-12 General Education	*2026-27 Projected*	2026-27 Actual	Projection Error #	Projection Error %
Elementary (K-5)	*14,277*	14,274	(3)	-0.02%
Middle School (6-8)	*8,207*	8,259	52	0.63%
High School (9-12)	*11,408*	11,356	(52)	-0.46%
Total	***33,892***	**33,889**	**(3)**	**-0.01%**

Following slides refer to the K-12 General Education population only

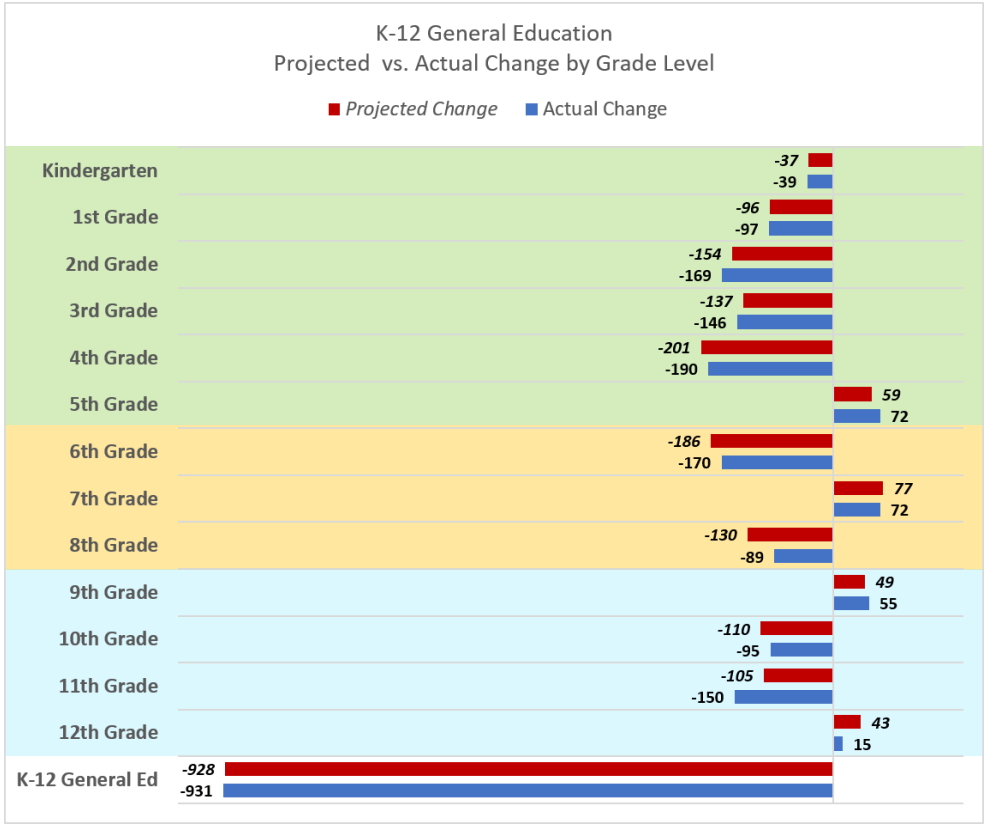
Other Programs	*2026-27 Projected*	2026-27 Actual	Projection Error #	Projection Error %
Early College (EC)	*290*	290	-	0.00%
Alternative Programs (AP)	*93*	74	(19)	-20.43%
Special Education Outside Placement (SP)	*81*	73	(8)	-9.88%
Self-Contained Specialized Programs (SCSP)	*1,087*	1,025	(62)	-5.70%
Charter Schools (Arco Iris & HOPE Chinese)	*830*	836	6	0.72%
Total	***2,381***	**2,298**	**(83)**	**-3.49%**

	2026-27 Projected	2026-27 Actual	Projection Error #	Projection Error %
District Grand Total	***36,273***	**36,187**	**(86)**	**-0.24%**

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BEAVERTON SCHOOL DISTRICT

K-12 General Education Projected vs. Actual Change By Grade Level



-3 error

84

Figures refer to K-12 General Education Only

K-12 General Education Cohorts 2016 to 2026

General Education programs include all K-5, K-8, Summa, and Rachel Carson programs, and Option schools (ACMA, CS, ISB, BASE and FLEX Online).

K-12 General Education	2016-17	2017-18	2018-19	2019-20	2020-21 (Pandemic)	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	
Kindergarten	**2,751**	2,876	2,774	2,909	2,415	2,569	2,437	2,397	2,304	2,183	2,144	Class of 2039
1st Grade	3,020	**2,781**	2,949	2,846	2,782	2,638	2,659	2,532	2,501	2,304	2,207	Class of 2038
2nd Grade	3,045	2,986	**2,839**	2,975	2,705	2,787	2,625	2,704	2,563	2,457	2,288	Class of 2037
3rd Grade	3,079	2,994	2,987	**2,845**	2,815	2,680	2,782	2,607	2,780	2,552	2,406	Class of 2036
4th Grade	3,098	3,089	3,023	3,001	**2,703**	2,808	2,709	2,787	2,634	2,716	2,526	Class of 2035
5th Grade	3,080	3,076	3,100	3,051	2,897	**2,721**	2,795	2,685	2,815	2,631	2,703	Class of 2034
6th Grade	3,150	3,134	3,095	3,137	2,981	2,930	**2,744**	2,836	2,745	2,856	2,686	Class of 2033
7th Grade	3,121	3,142	3,142	3,090	3,030	2,977	2,859	**2,731**	2,889	2,744	2,816	Class of 2032
8th Grade	3,085	3,078	3,142	3,120	3,008	3,015	2,956	2,873	**2,771**	2,846	2,757	Class of 2031
9th Grade	3,041	3,161	3,166	3,222	3,199	3,112	3,060	3,034	2,967	**2,884**	2,939	Class of 2030
10th Grade	2,994	3,009	3,148	3,168	3,155	3,134	3,110	3,023	3,051	2,969	**2,874**	**Class of 2029**
11th Grade	2,810	2,793	2,820	2,946	2,944	2,980	2,964	2,930	2,889	2,894	2,744	Class of 2028
12th Grade	2,684	2,734	2,706	2,777	2,868	2,997	2,976	2,876	2,888	2,784	2,799	Class of 2027
K-12th Grades Total	**38,958**	**38,853**	**38,891**	**39,087**	**37,502**	**37,348**	**36,676**	**36,015**	**35,797**	**34,820**	**33,889**	
Annual Change		(105)	38	196	(1,585)	(154)	(672)	(661)	(218)	(977)	(931)	
% Annual Change		-0.27%	0.10%	0.50%	-4.06%	-0.41%	-1.80%	-1.80%	-0.61%	-2.73%	-2.67%	
Change since 2019					(1,585)	(1,739)	(2,411)	(3,072)	(3,290)	(4,267)	(5,198)	
% change since 2019					-4.1%	-4.4%	-6.4%	-8.2%	-8.8%	-11.4%	-13.9%	

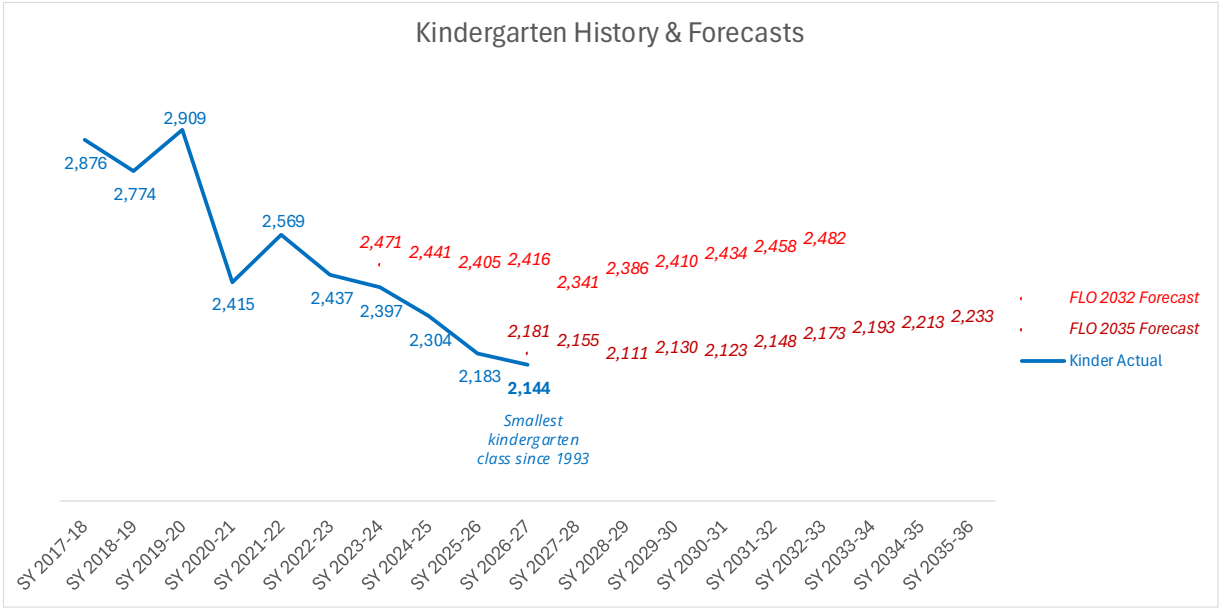
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BEAVERTON SCHOOL DISTRICT

Figures refer to K-12 General Education Only

Kindergarten Cohort Size

- Kindergarten cohort sizes declined significantly since the COVID-19 pandemic, driven primarily by declining births
- The most recent forecast revised kindergarten cohort sizes downward

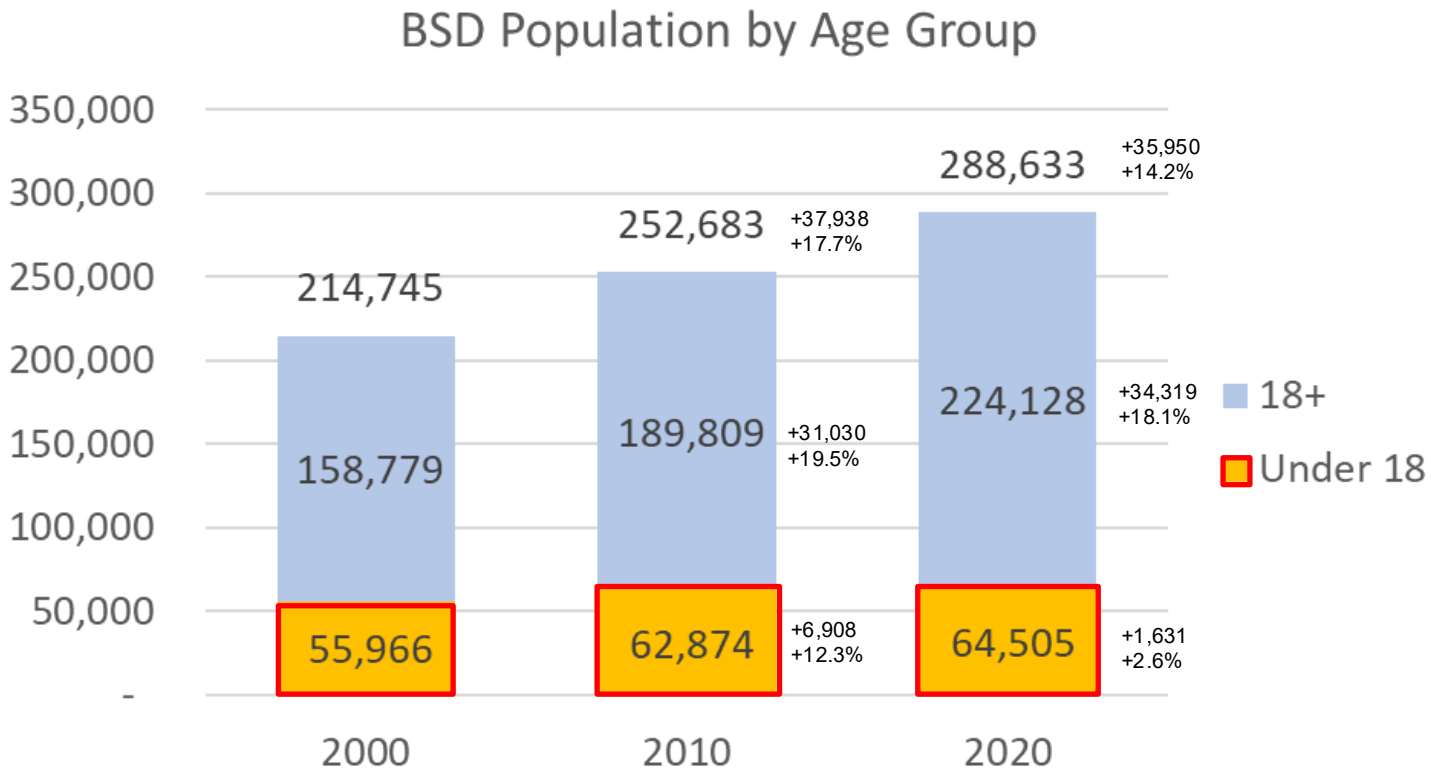


86

FLO Analytics 2022 Long Range Forecast (2023-2032)

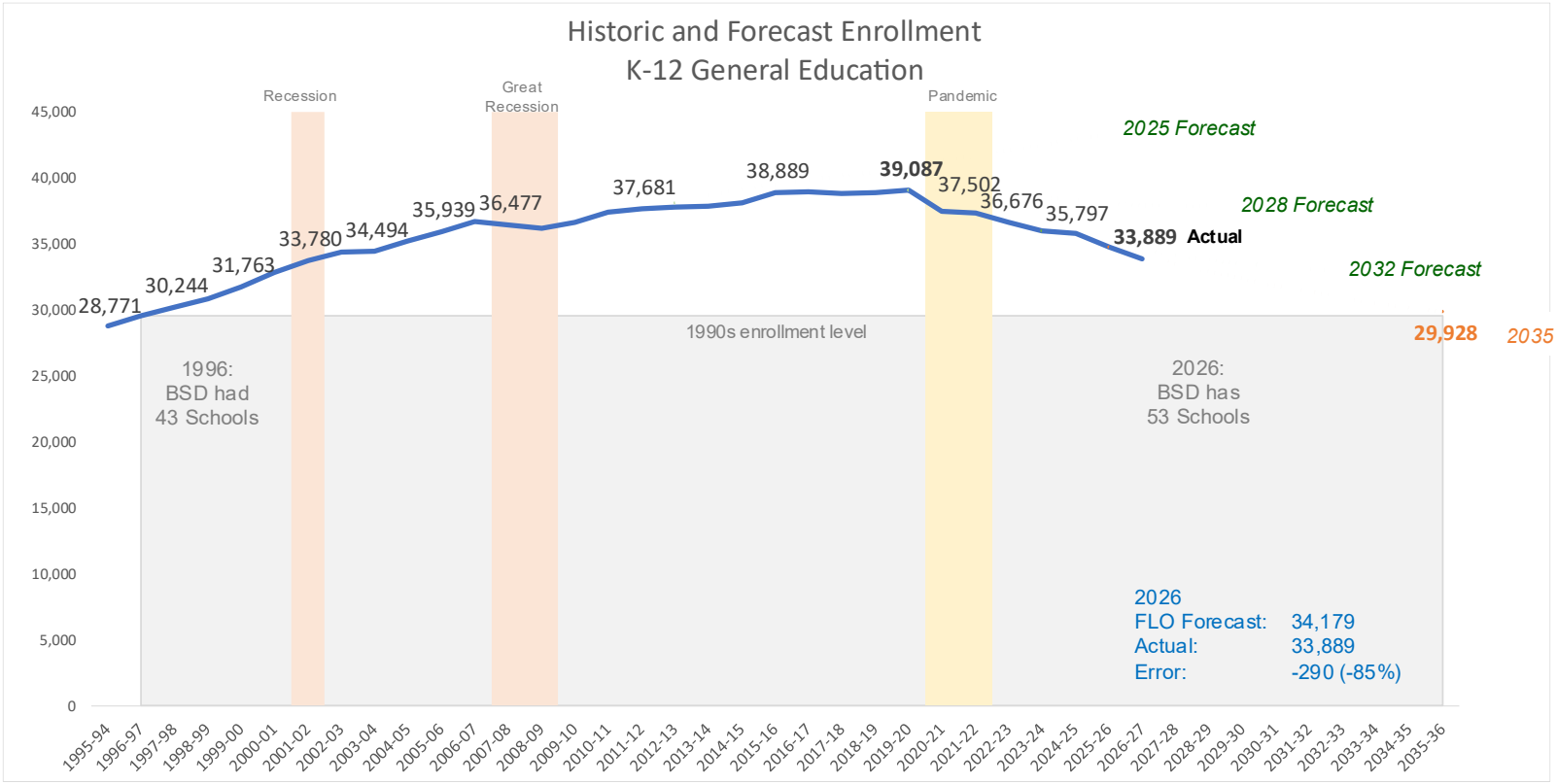
Figures refer to K-12 General Education Only

Districtwide: Declining Share of Population Under 18



FLO Analytics 2025 Long Range Forecast (2026-2036)

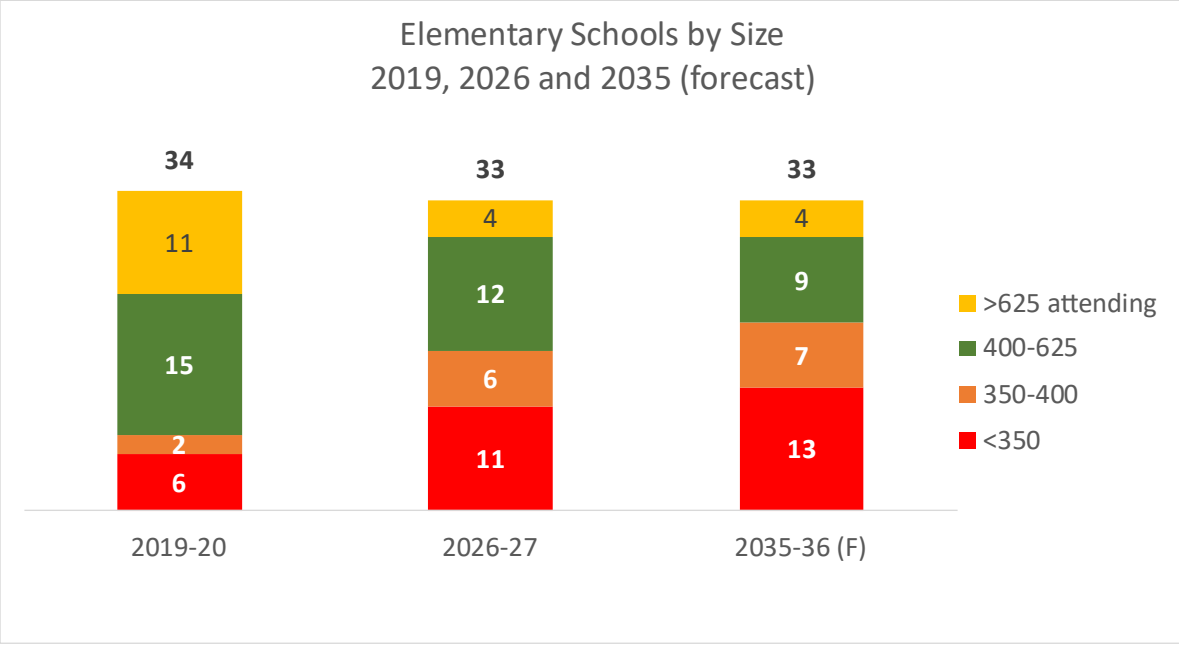
K-12 General Education Forecast



88

Figures refer to K-12 General Education Only

Growing Number of Small Elementary Schools



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BEAVERTON SCHOOL DISTRICT

Figures refer to K-12 General Education Only

Funding & Financial Implications

- The number of students and their demographics determine funding for the State School Fund and Student Investment Account
- For districts experiencing declining enrollment, the State School Fund uses the immediate prior year enrollment and demographic information for funding
- September 30th enrollment is usually our high water mark for school year enrollment
- Schools are staffed using our equity based Staffing Allocation Methodology

Thank you!

Questions?

Long Range Planning
1260 NW Waterhouse Avenue | Beaverton, Oregon 97006
503-356-4449 | www.beaverton.k12.or.us

MEMORANDUM

TO: Casey Waletich, Associate Superintendent, Operations and Support Services
Jessica Jones, Chief Financial Officer, Business Services
Steven A. Sparks, Executive Administrator for Long Range Planning
FROM: Robert McCracken, Demographics & Facility Planning Specialist
DATE: October 1, 2026
SUBJECT: Enrollment Summary for the 2026-2027 School Year

Total enrollment in the Beaverton School District declined from the prior school year by a total of 893 students (-2.41%). This was the 2nd largest drop in enrollment since 2020 (-4.02%). Table 1 shows change by school level and program for the district. For the K-12 general education population, which comprises the bulk of enrollment, each school level experienced a decline, with the largest drop at the elementary school level.[1] Early College experienced a small decline, and Alternative Programs experienced a relatively large drop. Other programs, including Special Placement, Self-Contained Specialized Programs and the two district charter schools saw minor increases from last year.

Table 1: Enrollment Change 2025 to 2026 School Year

K-12 General Education	2025-26	2026-27	Change #	Change %
Elementary (K-5)	14,843	14,274	(569)	-3.83%
Middle School (6-8)	8,446	8,259	(187)	-2.21%
High School (9-12)	11,531	11,356	(175)	-1.52%
Total	**34,820**	**33,889**	**(931)**	**-2.67%**

Other Programs	2025-26	2026-27	Change #	Change %
Early College (EC)	297	290	(7)	-2.36%
Alternative Programs (AP)	96	74	(22)	-22.92%
Special Education Outside Placement (SP)	70	73	3	4.29%
Self-Contained Specialized Programs (SCSP)	984	1,025	41	4.17%
Charter Schools (Arco Iris & HOPE Chinese)	813	836	23	2.83%
Total	**2,260**	**2,298**	**38**	**1.68%**

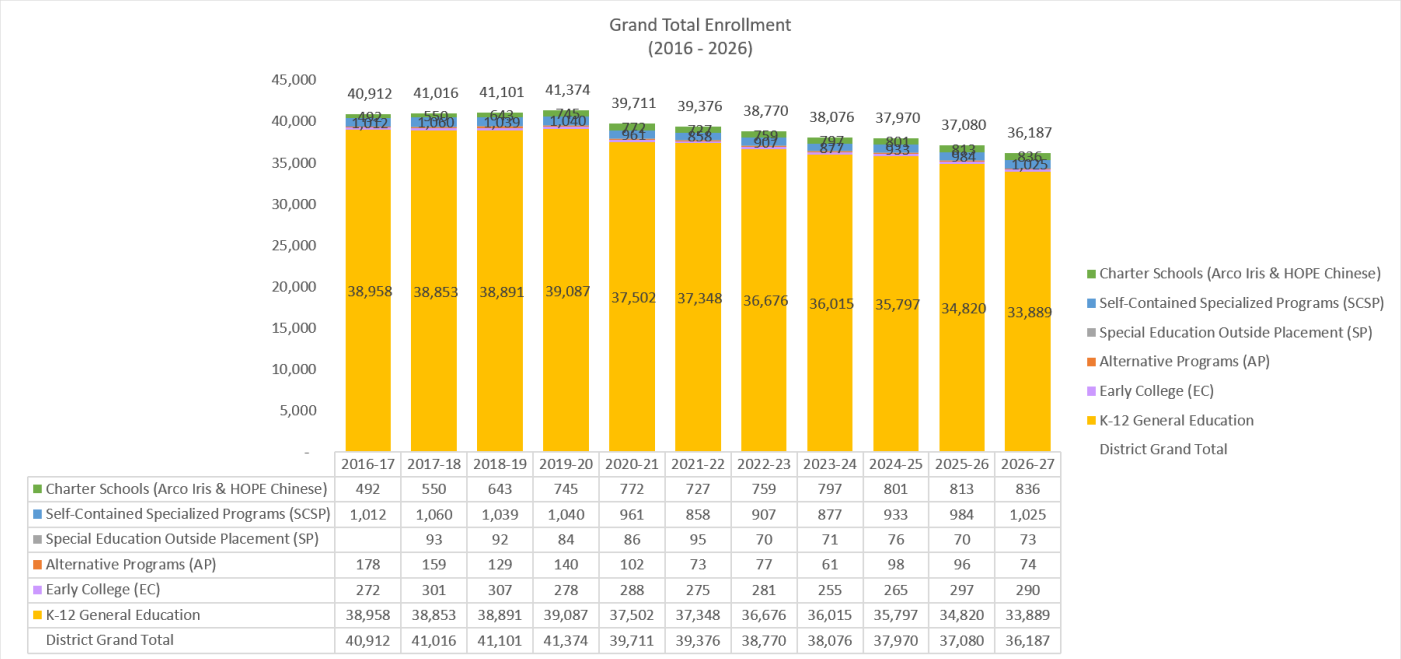
All Schools and Programs	2025-26	2026-27	Change #	Change %
Grand Total*	**37,080**	**36,187**	**(893)**	**-2.41%**

[1] Notes: General Education totals include all K-5, K-8, SUMMA, and Rachel Carson programs, and Middle and High School Options programs (ACMA, CS, ISB, BASE and FLEX Online). Pre-Kindergarten students are not included in figures above. The district Pre-Kindergarten total for 2025 is 409 students (in 2025 the Pre-Kindergarten population was 417).

Beaverton School District does not discriminate in any programs or activities 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.

Chart 1 shows historic grand total enrollment from 2016 to 2026. The district's peak enrollment year was 2019 (41,374) and has declined each year since. Since 2019, total enrollment has fallen by 5,187 students (-12.5%).

Chart 1: Beaverton School District Grand Total Enrollment



	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
Charter Schools (Arco Iris & HOPE Chinese)	492	550	643	745	772	727	759	797	801	813	836
Self-Contained Specialized Programs (SCSP)	1,012	1,060	1,039	1,040	961	858	907	877	933	984	1,025
Special Education Outside Placement (SP)		93	92	84	86	95	70	71	76	70	73
Alternative Programs (AP)	178	159	129	140	102	73	77	61	98	96	74
Early College (EC)	272	301	307	278	288	275	281	255	265	297	290
K-12 General Education	38,958	38,853	38,891	39,087	37,502	37,348	36,676	36,015	35,797	34,820	33,889
District Grand Total	40,912	41,016	41,101	41,374	39,711	39,376	38,770	38,076	37,970	37,080	36,187

Table 2 shows each program as a share of total district enrollment since 2016. While K-12 General education remains the largest program by far, its share has declined slightly each year since 2022. Self-Contained Specialized Programs have grown in share since 2023. The Charter School share has grown each year since 2021.

Table 2: Program Share of District Total Enrollment

Program Share of District Grand Total

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
K-12 General Education	95.22%	94.73%	94.62%	94.47%	94.44%	94.85%	94.60%	94.59%	94.28%	93.91%	93.65%
Early College (EC)	0.66%	0.73%	0.75%	0.67%	0.73%	0.70%	0.72%	0.67%	0.70%	0.80%	0.80%
Alternative Programs (AP)	0.44%	0.39%	0.31%	0.34%	0.26%	0.19%	0.20%	0.16%	0.26%	0.26%	0.20%
Special Education Outside Placement (SP)		0.23%	0.22%	0.20%	0.22%	0.24%	0.18%	0.19%	0.20%	0.19%	0.20%
Self-Contained Specialized Programs (SCSP)	2.47%	2.58%	2.53%	2.51%	2.42%	2.18%	2.34%	2.30%	2.46%	2.65%	2.83%
Charter Schools (Arco Iris & HOPE Chinese)	1.20%	1.34%	1.56%	1.80%	1.94%	1.85%	1.96%	2.09%	2.11%	2.19%	2.31%
District Grand Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

In addition to the drop in overall enrollment associated with the onset of the COVID-19 pandemic in 2020, smaller kindergarten class sizes are driving enrollment decline. The kindergarten class size saw a sharp drop in 2020, a recovery in 2021, and has declined each year since. Chart 2 shows actual kindergarten class sizes from 2017 to 2026. The chart also shows the kindergarten class size forecast from two recent forecasts. The most recent forecast, 2035 (base year 2025), revised kindergarten predictions substantially downward from the 2032 (base year 2022).[2]

[2] The district updates its 10-year forecast every 3-5 years for long-range planning purposes.

Chart 2: Beaverton School District Births and Kindergarten Cohorts

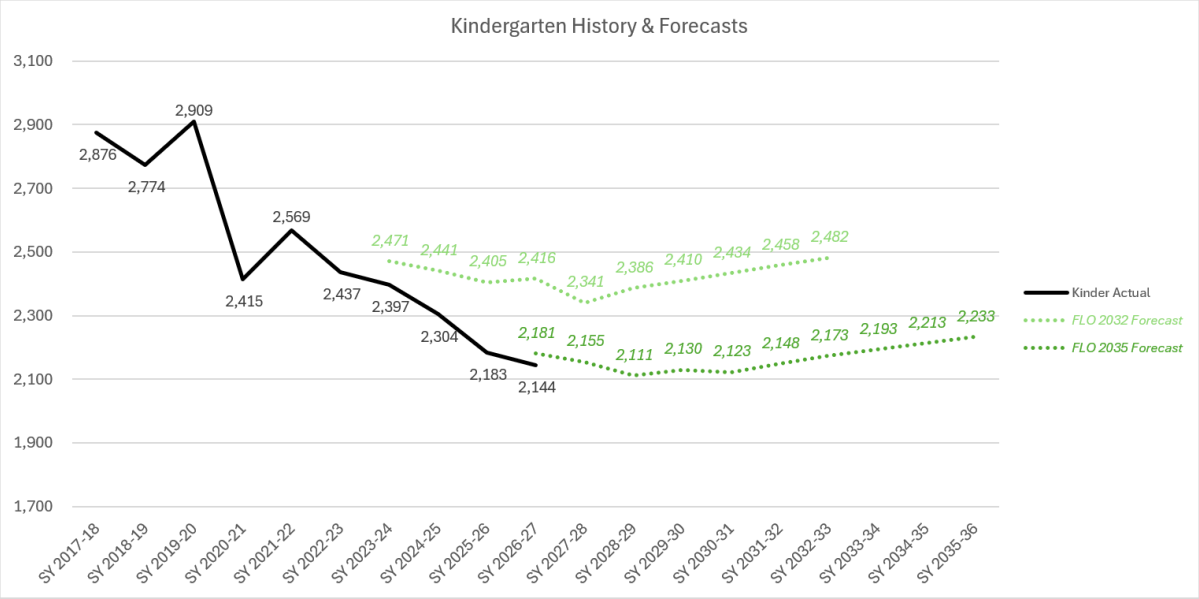


Table 3 shows the impact of smaller kindergarten classes on the K-12 general education enrollment over time. Cells are color coded by class size (red for larger numbers, blue for smaller). The district's largest cohorts, some with over 3,100 students prior to the pandemic, are being replaced by smaller cohorts each year. The average cohort size for all grades in 2016 was 2,997; in 2026 it is 2,607, a change of -13%. The bottom portion of the table shows annual change and the cumulative enrollment change since 2019 for the K-12 General Education population.

Table 3: Historic K-12 General Education Enrollment by Grade Level 2016-2026

K-12 General Education	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
Kindergarten	2,751	2,876	2,774	2,909	2,415	2,569	2,437	2,397	2,304	2,183	2,144
1st Grade	3,020	2,781	2,949	2,846	2,782	2,638	2,659	2,532	2,501	2,304	2,207
2nd Grade	3,045	2,986	2,839	2,975	2,705	2,787	2,625	2,704	2,563	2,457	2,286
3rd Grade	3,079	2,994	2,987	2,845	2,815	2,680	2,782	2,607	2,780	2,552	2,408
4th Grade	3,098	3,089	3,023	3,001	2,703	2,808	2,709	2,787	2,634	2,716	2,526
5th Grade	3,080	3,076	3,100	3,051	2,897	2,721	2,795	2,685	2,815	2,631	2,704
6th Grade	3,150	3,134	3,095	3,137	2,981	2,930	2,744	2,836	2,745	2,856	2,684
7th Grade	3,121	3,142	3,142	3,090	3,030	2,977	2,859	2,731	2,889	2,744	2,816
8th Grade	3,085	3,078	3,142	3,120	3,008	3,015	2,956	2,873	2,771	2,846	2,756
9th Grade	3,041	3,161	3,166	3,222	3,199	3,112	3,060	3,034	2,967	2,884	2,937
10th Grade	2,994	3,009	3,148	3,168	3,155	3,134	3,110	3,023	3,051	2,969	2,874
11th Grade	2,810	2,793	2,820	2,946	2,944	2,980	2,964	2,930	2,889	2,894	2,746
12th Grade	2,684	2,734	2,706	2,777	2,868	2,997	2,976	2,876	2,888	2,784	2,805
K-12th Grades Total	**38,958**	**38,853**	**38,891**	**39,087**	**37,502**	**37,348**	**36,676**	**36,015**	**35,797**	**34,820**	**33,893**
Annual Change		(105)	38	196	(1,585)	(154)	(672)	(661)	(218)	(977)	(927)
% Annual Change		-0.27%	0.10%	0.50%	-4.06%	-0.41%	-1.80%	-1.80%	-0.61%	-2.73%	-2.66%
Cumulative change since 2019					(1,585)	(1,739)	(2,411)	(3,072)	(3,290)	(4,267)	(5,194)
% Cumulative change since 2019					-4.1%	-4.4%	-6.4%	-8.2%	-8.8%	-11.4%	-13.8%

Additional details by grade and school level are available in the enrollment summary (attached).

BEAVERTON SCHOOL DISTRICT

Enrollment Summary
2026-2027 School Year
On September 30, 2026

Version date: 10/1/2026

Enrollment Summary

K-12 General Education	2025-26	2026-27	Change #	Change %
Elementary (K-5)	14,843	14,274	(569)	-3.83%
Middle School (6-8)	8,446	8,259	(187)	-2.21%
High School (9-12)	11,531	11,356	(175)	-1.52%
Total	**34,820**	**33,889**	**(931)**	**-2.67%**

Other Programs	2025-26	2026-27	Change #	Change %
Early College (EC)	297	290	(7)	-2.36%
Alternative Programs (AP)	96	74	(22)	-22.92%
Special Education Outside Placement (SP)	70	73	3	4.29%
Self-Contained Specialized Programs (SCSP)	984	1,025	41	4.17%
Charter Schools (Arco Iris & HOPE Chinese)	813	836	23	2.83%
Total	**2,260**	**2,298**	**38**	**1.68%**

All Schools and Programs	2025-26	2026-27	Change #	Change %
Grand Total*	**37,080**	**36,187**	**(893)**	**-2.41%**

	2025-26	2026-27	Change #	Change %
Pre-Kindergarten (excluded from district totals)	417	409	(8)	-1.9%

Projection Summary

K-12 General Education	*2026-27 Projected*	2026-27 Actual	Projection Error #	Projection Error %
Elementary (K-5)	*14,277*	14,274	(3)	-0.02%
Middle School (6-8)	*8,207*	8,259	52	0.63%
High School (9-12)	*11,408*	11,356	(52)	-0.46%
Total	***33,892***	**33,889**	**(3)**	**-0.01%**

Other Programs	*2026-27 Projected*	2026-27 Actual	Projection Error #	Projection Error %
Early College (EC)	*290*	290	-	0.00%
Alternative Programs (AP)	*93*	74	(19)	-20.43%
Special Education Outside Placement (SP)	*81*	73	(8)	-9.88%
Self-Contained Specialized Programs (SCSP)	*1,087*	1,025	(62)	-5.70%
Charter Schools (Arco Iris & HOPE Chinese)	*830*	836	6	0.72%
Total	***2,381***	**2,298**	**(83)**	**-3.49%**

	2026-27 Projected	2026-27 Actual	Projection Error #	Projection Error %
District Grand Total	***36,273***	**36,187**	**(86)**	**-0.24%**

K-12 General Education: Counts include all K-5, K-8, SUMMA, and Rachel Carson programs, and Middle and High School Options programs (e.g. ACMA, CS, ISB, BASE and FLEX Online).
Pre-Kindergarten students excluded from school and district counts, but are listed separately on this summary.
SCSP: These programs are located in buildings throughout the district, but not every building has every program located within it (e.g. ISC, EGC, ALC, etc.)
*Figures here do not include 1 student in EE status listed in the 9/30/2026 ESM

Historic Enrollment

On September 30 of each School Year

General Education programs include all K-5, K-8, Summa, and Rachel Carson programs, and Option schools (ACMA, CS, ISB, BASE and FLEX Online).

Pandemic

K-12 General Education	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	
Kindergarten	2,751	2,876	2,774	2,909	2,415	2,569	2,437	2,397	2,304	2,183	2,144	Class of 2039
1st Grade	3,020	2,781	2,949	2,846	2,782	2,638	2,659	2,532	2,501	2,304	2,207	Class of 2038
2nd Grade	3,045	2,986	2,839	2,975	2,705	2,787	2,625	2,704	2,563	2,457	2,288	Class of 2037
3rd Grade	3,079	2,994	2,987	2,845	2,815	2,680	2,782	2,607	2,780	2,552	2,406	Class of 2036
4th Grade	3,098	3,089	3,023	3,001	2,703	2,808	2,709	2,787	2,634	2,716	2,526	Class of 2035
5th Grade	3,080	3,076	3,100	3,051	2,897	2,721	2,795	2,685	2,815	2,631	2,703	Class of 2034
6th Grade	3,150	3,134	3,095	3,137	2,981	2,930	2,744	2,836	2,745	2,856	2,686	Class of 2033
7th Grade	3,121	3,142	3,142	3,090	3,030	2,977	2,859	2,731	2,889	2,744	2,816	Class of 2032
8th Grade	3,085	3,078	3,142	3,120	3,008	3,015	2,956	2,873	2,771	2,846	2,757	Class of 2031
9th Grade	3,041	3,161	3,166	3,222	3,199	3,112	3,060	3,034	2,967	2,884	2,939	Class of 2030
10th Grade	2,994	3,009	3,148	3,168	3,155	3,134	3,110	3,023	3,051	2,969	2,874	**Class of 2029**
11th Grade	2,810	2,793	2,820	2,946	2,944	2,980	2,964	2,930	2,889	2,894	2,744	Class of 2028
12th Grade	2,684	2,734	2,706	2,777	2,868	2,997	2,976	2,876	2,888	2,784	2,799	Class of 2027
K-12th Grades Total	**38,958**	**38,853**	**38,891**	**39,087**	**37,502**	**37,348**	**36,676**	**36,015**	**35,797**	**34,820**	**33,889**	
Annual Change		(105)	38	196	(1,585)	(154)	(672)	(661)	(218)	(977)	(931)	
% Annual Change		-0.27%	0.10%	0.50%	-4.06%	-0.41%	-1.80%	-1.80%	-0.61%	-2.73%	-2.67%	
Change since 2019					(1,585)	(1,739)	(2,411)	(3,072)	(3,290)	(4,267)	(5,198)	
% change since 2019					-4.1%	-4.4%	-6.4%	-8.2%	-8.8%	-11.4%	-13.9%	

Pandemic

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
K-12 General Education											
Elementary (K-5)	18,073	17,802	17,672	17,627	16,317	16,203	16,007	15,712	15,597	14,843	14,274
Middle School (6-8)	9,356	9,354	9,379	9,347	9,019	8,922	8,559	8,440	8,405	8,446	8,259
High School (9-12)	11,529	11,697	11,840	12,113	12,166	12,223	12,110	11,863	11,795	11,531	11,356
K-12 General Education	**38,958**	**38,853**	**38,891**	**39,087**	**37,502**	**37,348**	**36,676**	**36,015**	**35,797**	**34,820**	**33,889**
Other Programs											
Early College (EC)	272	301	307	278	288	275	281	255	265	297	290
Alternative Programs (AP)	178	159	129	140	102	73	77	61	98	96	74
Special Education Outside Placement (SP)		93	92	84	86	95	70	71	76	70	73
Self-Contained Specialized Programs (SCSP)	1,012	1,060	1,039	1,040	961	858	907	877	933	984	1,025
Charter Schools (Arco Iris & HOPE Chinese)	492	550	643	745	772	727	759	797	801	813	836
District Grand Total	**40,912**	**41,016**	**41,101**	**41,374**	**39,711**	**39,376**	**38,770**	**38,076**	**37,970**	**37,080**	**36,187**
Annual Change		104	85	273	(1,663)	(335)	(606)	(694)	(106)	(890)	(893)
% Annual Change		0.25%	0.21%	0.66%	-4.02%	-0.84%	-1.54%	-1.79%	-0.28%	-2.34%	-2.41%
Change since 2019					(1,663)	(1,998)	(2,604)	(3,298)	(3,404)	(4,294)	(5,187)	
% change since 2019					-4.0%	-4.8%	-6.3%	-8.0%	-8.2%	-10.4%	-12.5%	
Pre-Kindergarten			36	153	239	193	294	372	454	409	409	

Pre-Kindergarten students excluded from projections and district grand totals.

Pandemic

Change	16-17 to 17-18	17-18 to 18-19	18-19 to 19-20	19-20 to 20-21	20-21 to 21-22	21-22 to 22-23	22-23 to 23-24	23-24 to 24-25	24-25 to 25-26	25-26 to 26-27
K-12 General Education										
Elementary (K-5)	(271)	(130)	(45)	(1,310)	(114)	(196)	(295)	(115)	(754)	(569)
Middle School (6-8)	(2)	25	(32)	(328)	(97)	(363)	(119)	(35)	41	(187)
High School (9-12)	168	143	273	53	57	(113)	(247)	(68)	(264)	(175)
K-12 General Education	**(105)**	**38**	**196**	**(1,585)**	**(154)**	**(672)**	**(661)**	**(218)**	**(977)**	**(931)**
Other Programs										
Early College (EC)	29	6	(29)	10	(13)	6	(26)	10	32	(7)
Alternative Programs (AP)	(19)	(30)	11	(38)	(29)	4	(16)	37	(2)	(22)
Special Education Outside Placement (SP)	93	(1)	(8)	2	9	(25)	1	5	(6)	3
Self-Contained Specialized Programs (SCSP)	48	(21)	1	(79)	(103)	49	(30)	56	51	41
Charter Schools (Arco Iris & HOPE Chinese)	58	93	102	27	(45)	32	38	4	12	23
District Grand Total	**104**	**85**	**273**	**(1,663)**	**(335)**	**(606)**	**(694)**	**(106)**	**(890)**	**(893)**

Pandemic

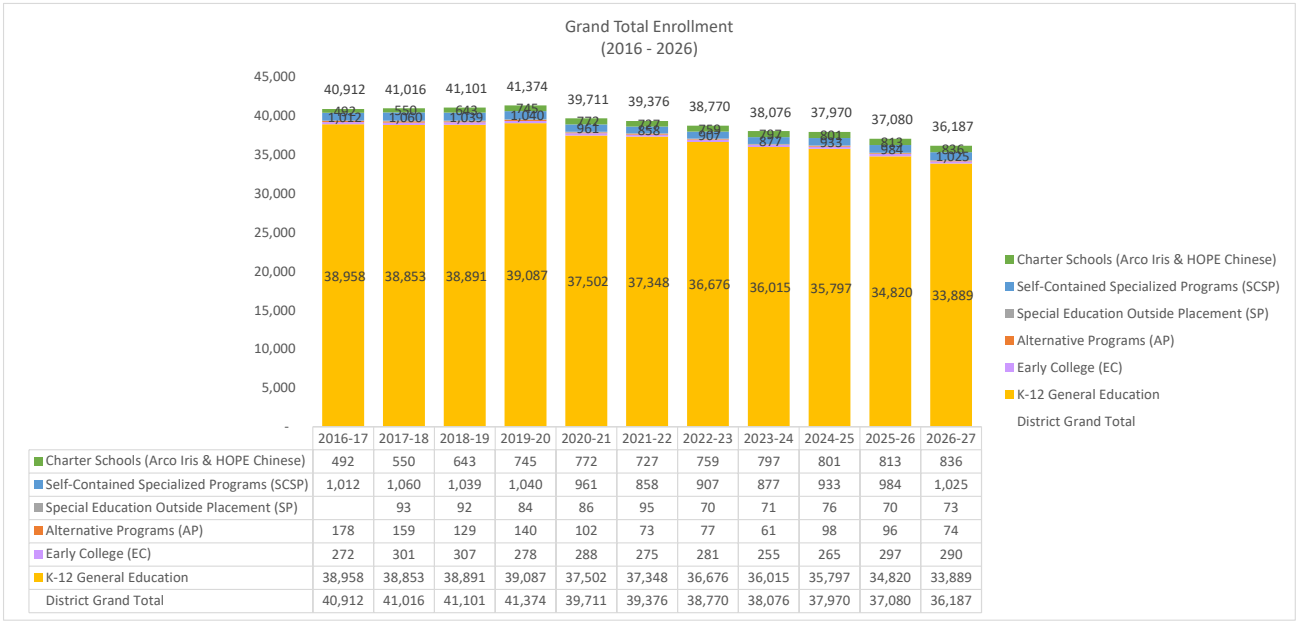
% Change	16-17 to	17-18 to	18-19 to	19-20 to	20-21 to	21-22 to	22-23 to	23-24 to	24-25 to	25-26 to
K-12 General Education										
Elementary (K-5)	-1.50%	-0.73%	-0.25%	-7.43%	-0.70%	-1.21%	-1.84%	-0.73%	-4.83%	-3.83%
Middle School (6-8)	-0.02%	0.27%	-0.34%	-3.51%	-1.08%	-4.07%	-1.39%	-0.41%	0.49%	-2.21%
High School (9-12)	1.46%	1.22%	2.31%	0.44%	0.47%	-0.92%	-2.04%	-0.57%	-2.24%	-1.52%
K-12 General Education	**-0.27%**	**0.10%**	**0.50%**	**-4.06%**	**-0.41%**	**-1.80%**	**-1.80%**	**-0.61%**	**-2.73%**	**-2.67%**
Other Programs										
Early College (EC)	10.66%	1.99%	-9.45%	3.60%	-4.51%	2.18%	-9.25%	3.92%	12.08%	-2.36%
Alternative Programs (AP)	-10.67%	-18.87%	8.53%	-27.14%	-28.43%	5.48%	-20.78%	60.66%	-2.04%	-22.92%
Special Education Outside Placement (SP)			-8.70%	2.38%	10.47%	-26.32%	1.43%	7.04%	-7.89%	4.29%
Self Contained Special Education (SCSP)	4.74%	-1.98%	0.10%	-7.60%	-10.72%	5.71%	-3.31%	6.39%	5.47%	4.17%
Charter Schools (Arco Iris & HOPE Chinese)	11.79%	16.91%	15.86%	3.62%	-5.83%	4.40%	5.01%	0.50%	1.50%	2.83%
District Grand Total	**0.25%**	**0.21%**	**0.66%**	**-4.02%**	**-0.84%**	**-1.54%**	**-1.79%**	**-0.28%**	**-2.34%**	**-2.41%**

Historic Enrollment

On September 30 of each School Year

Program Share of District Grand Total

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
K-12 General Education	95.22%	94.73%	94.62%	94.47%	94.44%	94.85%	94.60%	94.59%	94.28%	93.91%	93.65%
Early College (EC)	0.66%	0.73%	0.75%	0.67%	0.73%	0.70%	0.72%	0.67%	0.70%	0.80%	0.80%
Alternative Programs (AP)	0.44%	0.39%	0.31%	0.34%	0.26%	0.19%	0.20%	0.16%	0.26%	0.26%	0.20%
Special Education Outside Placement (SP)		0.23%	0.22%	0.20%	0.22%	0.24%	0.18%	0.19%	0.20%	0.19%	0.20%
Self-Contained Specialized Programs (SCSP)	2.47%	2.58%	2.53%	2.51%	2.42%	2.18%	2.34%	2.30%	2.46%	2.65%	2.83%
Charter Schools (Arco Iris & HOPE Chinese)	1.20%	1.34%	1.56%	1.80%	1.94%	1.85%	1.96%	2.09%	2.11%	2.19%	2.31%
District Grand Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

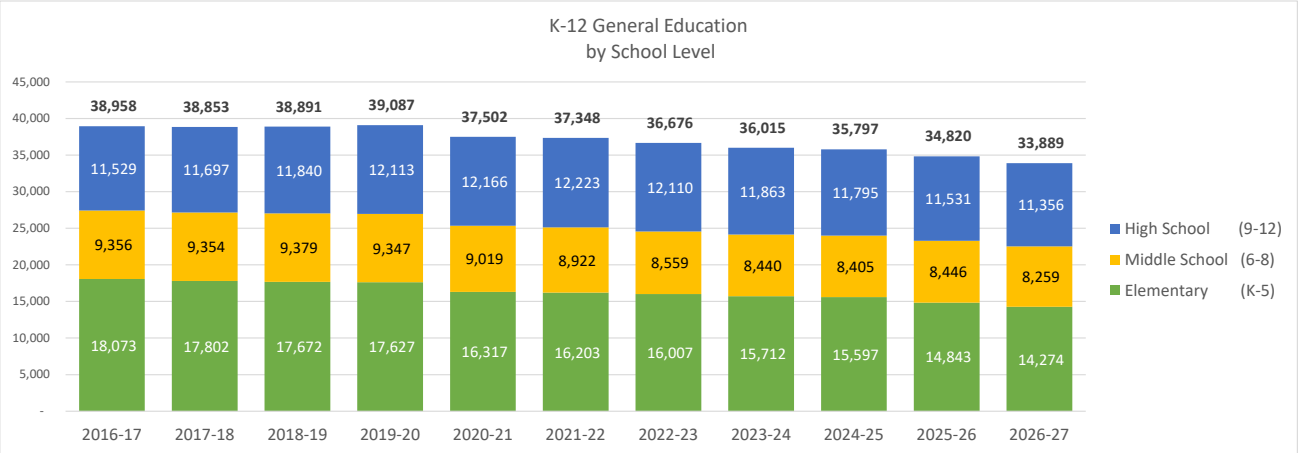


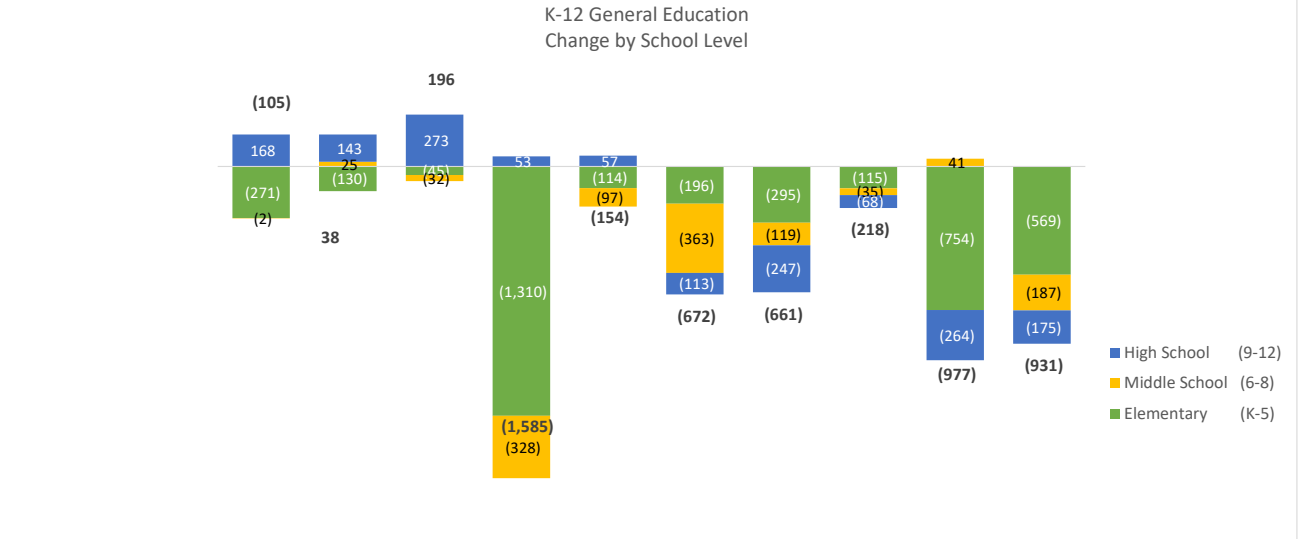
	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
Charter Schools (Arco Iris & HOPE Chinese)	492	550	643	745	772	727	759	797	801	813	836
Self-Contained Specialized Programs (SCSP)	1,012	1,060	1,039	1,040	961	858	907	877	933	984	1,025
Special Education Outside Placement (SP)		93	92	84	86	95	70	71	76	70	73
Alternative Programs (AP)	178	159	129	140	102	73	77	61	98	96	74
Early College (EC)	272	301	307	278	288	275	281	255	265	297	290
K-12 General Education	38,958	38,853	38,891	39,087	37,502	37,348	36,676	36,015	35,797	34,820	33,889
District Grand Total	40,912	41,016	41,101	41,374	39,711	39,376	38,770	38,076	37,970	37,080	36,187

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Historic Enrollment

On September 30 of each School Year





	16-17 to 17-18	17-18 to 18-19	18-19 to 19-20	19-20 to 20-21	20-21 to 21-22	21-22 to 22-23	22-23 to 23-24	23-24 to 24-25	24-25 to 25-26	25-26 to 26-27
High School (9-12)	168	143	273	53	57	(113)	(247)	(68)	(264)	(175)
Middle School (6-8)	(2)	25	(32)	(328)	(97)	(363)	(119)	(35)	41	(187)
Elementary (K-5)	(271)	(130)	(45)	(1,310)	(114)	(196)	(295)	(115)	(754)	(569)
K-12 General Education	(105)	38	196	(1,585)	(154)	(672)	(661)	(218)	(977)	(931)

2026-27

K-12 General Education
Enrollment by School and Grade

Elementary School	On September 30, 2026 Grade Level						*1st - 5th Grade*	K - 5th Grade (Total)	Share of K-5
	Kinder	1st	2nd	3rd	4th	5th			
Aloha-Huber Park (K-5)	74	95	122	121	113	145	*596*	**670**	4.7%
Barnes	62	58	64	60	58	67	*307*	**369**	2.6%
Beaver Acres	109	99	106	81	108	114	*508*	**617**	4.3%
Bethany	66	66	64	74	68	59	*331*	**397**	2.8%
Bonny Slope	73	80	81	96	127	129	*513*	**586**	4.1%
Cedar Mill	54	50	59	53	65	78	*305*	**359**	2.5%
Chehalem	44	51	56	50	60	58	*275*	**319**	2.2%
Cooper Mountain	61	51	50	51	62	59	*273*	**334**	2.3%
Elmonica	65	72	58	82	65	75	*352*	**417**	2.9%
Errol Hassell	44	37	41	48	40	49	*215*	**259**	1.8%
Findley	82	65	77	95	107	93	*437*	**519**	3.6%
Fir Grove	49	63	50	48	60	59	*280*	**329**	2.3%
Greenway	51	54	57	48	48	63	*270*	**321**	2.2%
Hazeldale	78	71	85	88	84	84	*412*	**490**	3.4%
Hiteon	60	73	68	79	81	79	*380*	**440**	3.1%
Jacob Wismer	69	94	99	78	79	77	*427*	**496**	3.5%
Kinnaman	50	62	62	66	62	72	*324*	**374**	2.6%
McKay (closed end of 2025-26)	-	-	-	-	-	-	-	**-**	0.0%
McKinley	116	99	102	102	98	126	*527*	**643**	4.5%
Montclair	42	40	36	43	55	48	*222*	**264**	1.8%
Nancy Ryles	68	59	80	73	73	71	*356*	**424**	3.0%
Oak Hills	67	53	64	64	77	79	*337*	**404**	2.8%
Raleigh Hills (K-5)	50	55	62	60	66	75	*318*	**368**	2.6%
Raleigh Park	29	32	39	49	32	52	*204*	**233**	1.6%
Ridgewood	48	56	45	52	56	60	*269*	**317**	2.2%
Rock Creek	43	44	49	54	72	67	*286*	**329**	2.3%
Sato	118	127	122	133	165	146	*693*	**811**	5.7%
Scholls Heights	96	91	89	113	92	100	*485*	**581**	4.1%
Sexton Mountain	54	48	48	75	69	77	*317*	**371**	2.6%
Springville (K-5)	89	108	117	121	115	127	*588*	**677**	4.7%
Terra Linda	43	50	36	51	43	49	*229*	**272**	1.9%
Vose	78	83	81	83	101	106	*454*	**532**	3.7%
West TV	52	42	52	37	36	62	*229*	**281**	2.0%
William Walker	60	68	64	71	78	81	*362*	**422**	3.0%
Elementary Total (Physical Loc)	**2,144**	**2,196**	**2,285**	**2,399**	**2,515**	**2,686**	**12,081**	**14,225**	**99.7%**
FLEX Online (K-5)	-	11	3	7	11	17	*49*	**49**	0.3%
Elementary Total (incl. FLEX)	**2,144**	**2,207**	**2,288**	**2,406**	**2,526**	**2,703**	**12,130**	**14,274**	**100.0%**

Italics = Title 1

10/1/2026

K-12 General Education
Enrollment by School and Grade
On September 30, 2026

Middle School	Grade Level 6th	7th	8th	6th - 8th Total	Share of 6-8
K-8 School					
Aloha-Huber Park (6-8th graders)	53	58	49	160	1.9%
Comprehensive Middle Schools					
Cedar Park					
Comprehensive	145	149	149	**443**	5.4%
Rachel Carson	66	63	58	**187**	2.3%
Cedar Park Total	**211**	**212**	**207**	**630**	**7.6%**
Conestoga	**211**	**245**	**258**	**714**	**8.6%**
Five Oaks	**253**	**221**	**256**	**730**	**8.8%**
Highland Park	**238**	**203**	**189**	**630**	**7.6%**
Meadow Park					
Comprehensive	190	207	189	**586**	7.1%
Summa	-	15	23	**38**	0.5%
Meadow Park Total	**190**	**222**	**212**	**624**	**7.6%**
Mountain View	**240**	**262**	**233**	**735**	**8.9%**
Stoller					
Comprehensive	291	283	253	**827**	10.0%
Summa	51	88	75	**214**	2.6%
Stoller Total	**342**	**371**	**328**	**1,041**	**12.6%**
Tumwater					
Comprehensive	273	260	281	**814**	9.9%
Summa	33	60	69	**162**	2.0%
Tumwater Total	**306**	**320**	**350**	**976**	**11.8%**
Whitford					
Comprehensive	198	226	204	**628**	7.6%
Summa	22	48	38	**108**	1.3%
Whitford Total	**220**	**274**	**242**	**736**	**8.9%**
Aloha-Huber Park 6-8th	***53***	***58***	***49***	***160***	***1.9%***
Comprehensive	***2,039***	***2,056***	***2,012***	***6,107***	***73.9%***
Rachel Carson	***66***	***63***	***58***	***187***	***2.3%***
SUMMA	***106***	***211***	***205***	***522***	***6.3%***
Middle Schools & AHP 6-8th Subtotal	***2,264***	***2,388***	***2,324***	***6,976***	***84.5%***
Options Middle Schools					
ACMA Middle	114	109	110	**333**	4.0%
BASE Middle	134	132	136	**402**	4.9%
ISB Middle	151	153	154	**458**	5.5%
Options Subtotal	***399***	***394***	***400***	***1,193***	***14.4%***
Middle School Total (Physical Loc)	**2,663**	**2,782**	**2,724**	**8,169**	**98.9%**
FLEX Online (6-8th)	23	34	33	**90**	1.1%
Middle School Total (incl. FLEX)	**2,686**	**2,816**	**2,757**	**8,259**	**100.0%**

K-12 General Education
Enrollment by School and Grade
On September 30, 2026

10/1/2026

High School	Grade Level 9th	10th	11th	12th	9th - 12th Total	Share of 9-12
Comprehensive High Schools						
Aloha	342	342	338	390	**1,412**	**12.4%**
Beaverton	339	315	322	365	**1,341**	**11.8%**
Mountainside	487	440	432	403	**1,762**	**15.5%**
Southridge	291	327	295	291	**1,204**	**10.6%**
Sunset	446	431	392	404	**1,673**	**14.7%**
Westview	643	596	588	567	**2,394**	**21.1%**
Comprehensive Subtotal	***2,548***	***2,451***	***2,367***	***2,420***	***9,786***	**86.2%**
Options High Schools						
ACMA High School	103	97	83	67	**350**	**3.1%**
BASE High School (Cap. Center)	131	127	113	87	**458**	**4.0%**
Community School (Merlo)	23	27	35	59	**144**	**1.3%**
ISB High School	109	112	91	86	**398**	**3.5%**
Options Subtotal	***366***	***363***	***322***	***299***	***1,350***	**11.9%**
High School Total (Physical Loc)	**2,914**	**2,814**	**2,689**	**2,719**	**11,136**	**98.1%**
FLEX Online (9-12th)	25	60	55	80	**220**	**1.9%**
High School Total (Incl. FLEX)	**2,939**	**2,874**	**2,744**	**2,799**	**11,356**	**100.0%**
Early College			162	128	**290**	

FLEX Online	Grade Level Kinder	1st	2nd	3rd	4th	5th	1st - 5th Grade	K - 5th Grade
	-	11	3	7	11	17	**49**	**49**

Grade Level 6th	7th	8th	6th-8th Grade
23	34	33	**90**

Grade Level 9th	10th	11th	12th	9th - 12th Total
25	60	55	80	**220**

FLEX Online Total **359**

Charter Schools	Grade Level Kinder	1st	2nd	3rd	4th	5th	1st - 5th Grade	K - 5th Grade (Total)
Arco Iris	80	79	80	79	60	53	**351**	**431**
Hope Chinese	52	53	52	52	51	52	**260**	**312**

Charter Schools	Grade Level 6th	7th	8th	6th-8th Grade	Total
Arco Iris				**0**	**431**
Hope Chinese	32	28	33	**93**	**405**

Charter School Total **836**

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2026-27

K-12 General Education
Change by School and Program
On September 30, 2026

Region	Elementary School	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
SW	*Aloha Huber (K-5)*	737	670	(67)	-9.1%
CW	*Barnes*	400	369	(31)	-7.8%
CW	*Beaver Acres*	672	617	*(55)*	-8.2%
NW	Bethany	388	397	9	2.3%
NE	Bonny Slope	587	586	(1)	-0.2%
NE	Cedar Mill	357	359	2	0.6%
SW	*Chehalem*	347	319	(28)	-8.1%
S	Cooper Mountain	326	334	8	2.5%
CW	*Elmonica*	428	417	*(11)*	-2.6%
SW	Errol Hassell	289	259	(30)	-10.4%
NE	Findley	504	519	15	3.0%
SE	*Fir Grove*	340	329	(11)	-3.2%
SE	*Greenway*	249	321	72	28.9%
SW	*Hazeldale*	484	490	6	1.2%
SE	Hiteon	458	440	(18)	-3.9%
NW	Jacob Wismer	541	496	(45)	-8.3%
SW	*Kinnaman*	394	374	(20)	-5.1%
SE	*McKay (closed end of 2025-26)*	212	-	(212)	-100.0%
CW	*McKinley*	642	643	*1*	0.2%
SE	Montclair	264	264	-	0.0%
S	Nancy Ryles	409	424	15	3.7%
NW	Oak Hills	424	404	(20)	-4.7%
SE	*Raleigh Hills*	262	368	106	40.5%
CE	*Raleigh Park*	256	233	(23)	-9.0%
CE	Ridgewood	310	317	7	2.3%
NW	Rock Creek	356	329	(27)	-7.6%
NW	Sato	858	811	(47)	-5.5%
S	Scholls Heights	596	581	(15)	-2.5%
S	Sexton Mountain	389	371	(18)	-4.6%
NW	Springville	711	677	(34)	-4.8%
NE	Terra Linda	259	272	13	5.0%
SE	*Vose*	584	532	(52)	-8.9%
NE	West TV	276	281	5	1.8%
CE	*William Walker*	468	422	(46)	-9.8%
	Elementary Total (Physical Loc)	**14,777**	**14,225**	**(552)**	**-3.74%**
	FLEX Online (K-5)	66	49	(17)	-25.8%
	Elementary Total (Incl. FLEX)	**14,843**	**14,274**	**(569)**	**-3.83%**

Italics = Title 1

	Regional Groups	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
NW	SPR, SATO, JW, RC, BTH, OH	3,278	3,114	(164)	-5.0%
NE	BS, TL, CM, WTV, FIND	1,983	2,017	34	1.7%
CW	MCKN, ELM, BA, BAR	2,142	2,046	(96)	-4.5%
CE	WW, RDG, RPK	1,034	972	(62)	-6.0%
SW	AHP, CHE, EH, KIN, HAZ	2,251	2,112	(139)	-6.2%
S	COOP, SXM, NR, SCHO	1,720	1,710	(10)	-0.6%
SE	FG, VOS, GRE, HIT, MKAY, RH, MON	2,369	2,254	(115)	-4.9%
	Elementary Total (Physical Loc)	**14,777**	**14,225**	**(552)**	**-3.74%**
	FLEX Online	66	49	(17)	-25.8%
	Elementary Total (Incl. FLEX)	**14,843**	**14,274**	**(569)**	**-3.83%**

Title Status	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
Title I Schools	6,475	6,104	(371)	-5.7%
Non-Title I Schools	8,302	8,121	(181)	-2.2%
FLEX Online	66	49	(17)	-25.8%
Elementary Total (Incl. FLEX)	**14,843**	**14,274**	**(569)**	**-3.83%**

**Raleigh Park ES added as Title 1 School in SY 2020-21*

Chehalem, Elmonica, Fir Grove, Greenway, Hazeldale, Kinnaman, McKay, McKinley, Raleigh Hills, Raleigh Park, Vose, William Walker

10/1/2026

K-12 General Education
Change by School and Program
On September 30, 2026

Middle School	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
K-8 School				
Aloha-Huber Park (6-8th graders)	156	160	4	2.6%
Comprehensive Middle Schools				
Cedar Park				
Comprehensive	451	443	(8)	-1.8%
Rachel Carson	180	187	7	3.9%
Cedar Park Total	**631**	**630**	**(1)**	**-0.2%**
Conestoga	**788**	**714**	**(74)**	**-9.4%**
Five Oaks	**738**	**730**	**(8)**	**-1.1%**
Highland Park	**612**	**630**	**18**	**2.9%**
Meadow Park				
Comprehensive	593	586	(7)	-1.2%
Summa	72	38	(34)	-47.2%
Meadow Park Total	**665**	**624**	**(41)**	**-6.2%**
Mountain View	**754**	**735**	**(19)**	**-2.5%**
Stoller				
Comprehensive	848	827	(21)	-2.5%
Summa	258	214	(44)	-17.1%
Stoller Total	**1,106**	**1,041**	**(65)**	**-5.9%**
Tumwater				
Comprehensive	768	814	46	6.0%
Summa	186	162	(24)	-12.9%
Tumwater Total	**954**	**976**	**22**	**2.3%**
Whitford				
Comprehensive	634	628	(6)	-0.9%
Summa	117	108	(9)	-7.7%
Whitford Total	**751**	**736**	**(15)**	**-2.0%**
Aloha-Huber Park 6-8th	**156**	**160**	**4**	**2.6%**
Comprehensive	**6,186**	**6,107**	**(79)**	**-1.3%**
Rachel Carson	**180**	**187**	**7**	**3.9%**
SUMMA	**633**	**522**	**(111)**	**-17.5%**
Middle Schools & AHP 6-8th Subtotal	**7,155**	**6,976**	**(179)**	**-2.5%**
Options Middle Schools				
ACMA Middle	346	333	(13)	-3.8%
BASE Middle	403	402	(1)	-0.2%
ISB Middle	446	458	12	2.7%
Options Subtotal	1,195	1,193	(2)	-0.2%
Middle School Total (Physical Loc)	**8,350**	**8,169**	**(181)**	**-2.2%**
FLEX Online (6-8th)	96	90	(6)	-6.3%
Middle School Total (incl. FLEX)	**8,446**	**8,259**	**(187)**	**-2.2%**

10/1/2026

K-12 General Education
Change by School and Program
On September 30, 2026

High School	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
Comprehensive High Schools				
Aloha	1,506	1,412	(94)	-6.2%
Beaverton	1,333	1,341	8	0.6%
Mountainside	1,734	1,762	28	1.6%
Southridge	1,314	1,204	(110)	-8.4%
Sunset	1,717	1,673	(44)	-2.6%
Westview	2,305	2,394	89	3.9%
Comprehensive Subtotal	**9,909**	**9,786**	***(123)***	***-1.2%***

Options High Schools	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
ACMA High School	351	350	(1)	-0.3%
BASE High School	448	458	10	2.2%
Community School (Merlo)	147	144	(3)	-2.0%
ISB High School	429	398	(31)	-7.2%
Options Subtotal	**1,375**	**1,350**	***(25)***	***-1.8%***
High School Total (All Physical Loc)	**11,284**	**11,136**	**(148)**	**-1.3%**
FLEX Online (9-12th)	247	220	(27)	-10.9%
High School Total (Incl. FLEX)	**11,531**	**11,356**	**(175)**	**-1.5%**

Locations with Multiple Schools / Options Programs	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
K-8 Schools				
Aloha-Huber Park K-8	893	830	(63)	-7.1%
Middle Schools				
Cedar Park + Rachel Carson	631	630	(1)	-0.2%
Meadow Park + Summa	665	624	(41)	-6.2%
Stoller + Summa	1,106	1,041	(65)	-5.9%
Tumwater + Summa	954	976	22	2.3%
Whitford + Summa	751	736	(15)	-2.0%
Middle & High Options Schools				
ACMA Middle + High	697	683	(14)	-2.0%
BASE Middle + High (Capital Center)	851	860	9	1.1%
Community School (Merlo)	147	144	(3)	-2.0%
ISB Middle + High	875	856	(19)	-2.2%
Options & Mult. Programs (Phys. Loc)	**7,570**	**7,380**	**(190)**	**-2.5%**

Grand Total	Last Year 2025-26	Current Year 2026-27	Last Year to Current # Change	Last Year to Current % Change
K-5th	14,843	14,274	(569)	-3.8%
6-8th	8,446	8,259	(187)	-2.2%
9-12th	11,531	11,356	(175)	-1.5%
K-12	**34,820**	**33,889**	**(931)**	**-2.7%**

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2026-27

K-12 General Education Projected vs Actual Enrollment

On September 30, 2026

Region	Elementary School	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
SW	*Aloha Huber (K-5)*	709	670	(39)	-5.50%
CW	*Barnes*	382	369	(13)	-3.40%
CW	*Beaver Acres*	608	617	*9*	1.48%
NW	Bethany	383	397	14	3.66%
NE	Bonny Slope	586	586	-	0.00%
NE	Cedar Mill	348	359	11	3.16%
SW	*Chehalem*	321	319	(2)	-0.62%
S	Cooper Mountain	325	334	9	2.77%
CW	*Elmonica*	420	417	*(3)*	-0.71%
SW	Errol Hassell	258	259	1	0.39%
NE	Findley	477	519	42	8.81%
SE	*Fir Grove*	323	329	6	1.86%
SE	*Greenway*	326	321	(5)	-1.53%
SW	*Hazeldale*	511	490	(21)	-4.11%
SE	Hiteon	441	440	(1)	-0.23%
NW	Jacob Wismer	516	496	(20)	-3.88%
SW	*Kinnaman*	369	374	5	1.36%
SE	*McKay (Last Year 2025-26)*	-	-		
CW	*McKinley*	605	643	*38*	6.28%
SE	Montclair	262	264	2	0.76%
S	Nancy Ryles	411	424	13	3.16%
NW	Oak Hills	381	404	23	6.04%
SE	*Raleigh Hills*	385	368	(17)	-4.42%
CE	*Raleigh Park*	235	233	(2)	-0.85%
CE	Ridgewood	320	317	(3)	-0.94%
NW	Rock Creek	334	329	(5)	-1.50%
NW	Sato	846	811	(35)	-4.14%
S	Scholls Heights	568	581	13	2.29%
S	Sexton Mountain	363	371	8	2.20%
NW	Springville	687	677	(10)	-1.46%
NE	Terra Linda	274	272	(2)	-0.73%
SE	*Vose*	533	532	(1)	-0.19%
NE	West TV	266	281	15	5.64%
CE	*William Walker*	436	422	(14)	-3.21%
	Elementary Total (Physical Loc)	**14,209**	**14,225**	**16**	**0.11%**
	FLEX Online (K-5)	68	49	(19)	-27.9%
	Elementary Total (Incl. FLEX)	**14,277**	**14,274**	**(3)**	**-0.02%**

Italics = Title 1

	Regional Groups	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
NW	SPR, SATO, JW, RC, BTH, OH	3,147	3,114	(33)	-1.05%
NE	BS, TL, CM, WTV, FIND	1,951	2,017	66	3.38%
CW	MCKN, ELM, BA, BAR	2,015	2,046	31	1.54%
CE	WW, RDG, RPK	991	972	(19)	-1.92%
SW	AHP, CHE, EH, KIN, HAZ	2,168	2,112	(56)	-2.58%
S	COOP, SXM, NR, SCHO	1,667	1,710	43	2.58%
SE	FG, VOS, GRE, HIT, MKAY, RH, MON	2,270	2,254	(16)	-0.70%
	Elementary Total (Physical Loc)	**14,209**	**14,225**	**16**	**0.11%**
	FLEX Online	68	49	(19)	-27.94%
	Elementary Total (Incl. FLEX)	**14,277**	**14,274**	**(3)**	**-0.02%**

Title Status	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
Title I Schools	6,163	6,104	(59)	-0.96%
Non-Title I Schools	8,046	8,121	75	0.93%
FLEX Online	68	49	(19)	-27.94%
Elementary Total (Incl. FLEX)	**14,277**	**14,274**	**(3)**	**-0.02%**

**Raleigh Park ES added as Title 1 School in SY 2020-21*

Chehalem, Elmonica, Fir Grove, Greenway, Hazeldale, Kinnaman, McKay, McKinley, Raleigh Hills, Raleigh Park, Vose, William Walker

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K-12 General Education Projected vs Actual Enrollment

On September 30, 2026

Middle School	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
K-8 School				
Aloha-Huber Park (6-8th graders)	167	160	(7)	-4.19%
Comprehensive Middle Schools				
Cedar Park				
Comprehensive	427	443	16	3.75%
Rachel Carson	180	187	7	3.89%
Cedar Park Total	**607**	**630**	**23**	**3.79%**
Conestoga	**749**	**714**	**(35)**	**-4.67%**
Five Oaks	**704**	**730**	**26**	**3.69%**
Highland Park	**622**	**630**	**8**	**1.29%**
Meadow Park				
Comprehensive	568	586	18	3.17%
Summa	59	38	(21)	-35.59%
Meadow Park Total	**627**	**624**	**(3)**	**-0.48%**
Mountain View	**702**	**735**	**33**	**4.70%**
Stoller				
Comprehensive	842	827	(15)	-1.78%
Summa	226	214	(12)	-5.31%
Stoller Total	**1,068**	**1,041**	**(27)**	**-2.53%**
Tumwater				
Comprehensive	780	814	34	4.36%
Summa	155	162	7	4.52%
Tumwater Total	**935**	**976**	**41**	**4.39%**
Whitford				
Comprehensive	610	628	18	2.95%
Summa	106	108	2	1.89%
Whitford Total	**716**	**736**	**20**	**2.79%**
Aloha-Huber Park 6-8th	**167**	**160**	**(7)**	**-4.19%**
Comprehensive	**6,004**	**6,107**	**103**	**1.72%**
Rachel Carson	**180**	**187**	**7**	**3.89%**
SUMMA	**546**	**522**	**(24)**	**-4.40%**
Middle Schools & AHP 6-8th Subtotal	**6,897**	**6,976**	**79**	**1.15%**
Options Middle Schools				
ACMA Middle	350	333	(17)	-4.86%
BASE Middle	412	402	(10)	-2.43%
ISB Middle	457	458	1	0.22%
Options Subtotal	1,219	1,193	(26)	-2.13%
Middle School Total (Physical Loc)	**8,116**	**8,169**	**53**	**0.65%**
FLEX Online (6-8th)	91	90	(1)	-1.10%
Middle School Total (incl. FLEX)	**8,207**	**8,259**	**52**	**0.63%**

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K-12 General Education Projected vs Actual Enrollment

On September 30, 2026

High School	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
Comprehensive High Schools				
Aloha	1,460	1,412	(48)	-3.29%
Beaverton	1,338	1,341	3	0.22%
Mountainside	1,794	1,762	(32)	-1.78%
Southridge	1,228	1,204	(24)	-1.95%
Sunset	1,658	1,673	15	0.90%
Westview	2,363	2,394	31	1.31%
Comprehensive Subtotal	**9,841**	**9,786**	***(55)***	***-0.56%***

Options High Schools	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
ACMA High School	350	350	-	0.00%
BASE High School	133	458	325	244.36%
Community School (Merlo)	450	144	(306)	-68.00%
ISB High School	408	398	(10)	-2.45%
Options Subtotal	**1,341**	**1,350**	***9***	***0.67%***
High School Total (All Physical Loc)	**11,182**	**11,136**	**(46)**	**-0.41%**
FLEX Online (9-12th)	226	220	(6)	-2.7%
High School Total (Incl. FLEX)	**11,408**	**11,356**	**(52)**	**-0.46%**

Locations with Multiple Schools / Options Programs	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
K-8 Schools				
Aloha-Huber Park K-8	876	830	(46)	-5.25%
Middle Schools				
Cedar Park + Rachel Carson	607	630	23	3.79%
Meadow Park + Summa	627	624	(3)	-0.48%
Stoller + Summa	1,068	1,041	(27)	-2.53%
Tumwater + Summa	935	976	41	4.39%
Whitford + Summa	716	736	20	2.79%
Middle & High Options Schools				
ACMA Middle + High	700	683	(17)	-2.43%
BASE Middle + High (Capital Center)	545	860	315	57.80%
Community School (Merlo)	450	144	(306)	-68.00%
ISB Middle + High	865	856	(9)	-1.04%
Options & Mult. Programs (Phys. Loc)	**7,389**	**7,380**	**(9)**	**-0.12%**

Grand Total	Projected	Actual	Projection vs Actual # Error	Projection vs Actual % Error
K-5th	14,277	14,274	(3)	-0.02%
6-8th	8,207	8,259	52	0.63%
9-12th	11,408	11,356	(52)	-0.46%
K-12	**33,892**	**33,889**	**(3)**	**-0.01%**

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Self-Contained Specialized Programs (SCSP)
Enrollment by School

Elementary School	On September 30, 2026 Grade						K - 5th Grade (Total)	Classrooms
	Kinder	1st	2nd	3rd	4th	5th		
Beaver Acres								
ISC	5	2	10	6	5	3	**31**	3.0
Chehalem								
EGC	-	-	3	9	3	4	**19**	2.0
Cooper Mountain								
SCC	-	3	7	9	7	10	**36**	2.0
Errol Hassell								
ELC	-	-	2	2	1	2	**7**	1.0
Greenway								
ALC	-	1	3	7	6	11	**28**	2.0
Hazeldale								
ISC	5	4	-	5	7	1	**22**	2.0
Hiteon								
EGC	-	2	2	2	5	5	**16**	2.0
Kinnaman								
ISC	5	8	6	6	5	2	**32**	3.0
McKinley								
SRC	5	7	5	4	4	3	**28**	2.0
Nancy Ryles								
SRC	4	7	8	3	1	3	**26**	2.0
Oak Hills								
ALC	-	2	5	5	4	5	**21**	2.0
Raleigh Park								
SRC	5	8	5	5	-	3	**26**	2.0
Ridgewood								
SCC	1	1	4	3	4	12	**25**	2.0
Rock Creek								
ISC	5	5	6	9	2	8	**35**	3.0
Scholls Heights								
ISC	5	10	4	2	3	-	**24**	2.0
Sexton Mountain								
SRC	5	9	7	2	2	3	**28**	2.0
Terra Linda								
SRC	2	5	7	6	4	4	**28**	2.0
Vose								
EGC	-	2	3	1	5	5	**16**	2.0
William Walker								
ISC	7	8	4	5	6	3	**33**	3.0
Elementary SCSP Total	**54**	**84**	**91**	**91**	**74**	**87**	**481**	**41.0**

Schools without SCSP Programs

Aloha-Huber Park
Barnes
Bethany
Bonny Slope
Cedar Mill
Elmonica
Findley
Fir Grove
Jacob Wismer
Montclair
Sato
Springville
Raleigh Hills
West TV

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Self-Contained Specialized Programs (SCSP)
Enrollment by School
On September 30, 2026

Middle School	Grade 6th	7th	8th	6th - 8th Total	Classrooms
Comprehensive Middle Schools					
Cedar Park					
EGC	-	2	2	**4**	1.0
SRC	5	3	2	**10**	1.0
Cedar Park SCSP Total	**5**	**5**	**4**	**14**	**2.0**
Conestoga					
ALC	6	8	-	**14**	1.0
SCC	6	1	4	**11**	1.0
Conestoga SCSP Total	**12**	**9**	**4**	**25**	**2.0**
Five Oaks					
ALC	3	3	5	**11**	1.0
EGC	4	4	2	**10**	1.0
ISC	4	-	5	**9**	1.0
Five Oaks SCSP Total	**11**	**7**	**12**	**30**	**3.0**
Highland Park					
EGC	2	5	1	**8**	1.0
SCC	1	4	5	**10**	1.0
Highland Park SCSP Total	**3**	**9**	**6**	**18**	**2.0**
Meadow Park					
EGC	3	3	2	**8**	1.0
ISC	6	3	3	**12**	1.0
Meadow Park SCSP Total	**9**	**6**	**5**	**20**	**2.0**
Mountain View					
EGC	3	2	1	**6**	1.0
SRC	6	5	1	**12**	1.0
Mountain View SCSP Total	**9**	**7**	**2**	**18**	**2.0**
Stoller					
ALC	2	5	2	**9**	1.0
SCC	9	3	3	**15**	1.0
Stoller SCSP Total	**11**	**8**	**5**	**24**	**2.0**
Tumwater					
ISC	5	5	3	**13**	1.0
SRC	3	3	7	**13**	1.0
Tumwater SCSP Total	**8**	**8**	**10**	**26**	**2.0**
Whitford					
ISC	4	3	4	**11**	1.0
SRC	4	6	-	**10**	1.0
Whitford SCSP Total	**8**	**9**	**4**	**21**	**2.0**
Middle School SCSP Total	**76**	**68**	**52**	**196**	**19.0**

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Self-Contained Specialized Programs (SCSP)
Enrollment by School
On September 30, 2026

High School	Grade 9th	10th	11th	12th	9th - 12th Total	Classrooms
Comprehensive High Schools						
Aloha						
ALC	4	3	1	3	11	1.0
EGC	4	3	4	1	12	1.0
SCC	2	6	1	1	10	1.0
SRC	2	4	2	1	9	1.0
Aloha SCSP Total	**12**	**16**	**8**	**6**	**42**	**4.0**
Beaverton						
ALC	-	6	3	4	13	1.0
ISC	4	-	1	2	7	1.0
SRC	4	2	2	3	11	1.0
Beaverton SCSP Total	**8**	**8**	**6**	**9**	**31**	**3.0**
Mountainside						
ISC	2	5	5	1	13	1.0
SRC	2	3	3	6	14	2.0
Mountainside SCSP Total	**4**	**8**	**8**	**7**	**27**	**3.0**
Southridge						
ALC	1	6	3	-	10	1.0
EGC	3	6	4	2	15	1.0
ISC	2	2	3	5	12	1.0
Southridge SCSP Total	**6**	**14**	**10**	**7**	**37**	**3.0**
Sunset						
ALC	2	2	-	2	6	1.0
EGC	5	4	1	2	12	1.0
SCC	3	3	3	2	11	1.0
SRC	4	4	3	3	14	1.0
Sunset SCSP Total	**14**	**13**	**7**	**9**	**43**	**4.0**
Westview						
ALC	3	2	3	3	11	1.0
EGC	5	1	2	1	9	1.0
ISC	2	2	3	5	12	1.0
SCC	3	7	2	1	13	1.0
Westview SCSP Total	**13**	**12**	**10**	**10**	**45**	**4.0**
High School SCSP Total	**57**	**71**	**49**	**48**	**225**	**21.0**

	Grade 9th	10th	11th	12th	9th - 12th Total	
FLEX Online						
EGC	1				1	

	6th	7th	8th	9th	10th	11th	12th	Total	Classrooms
Capital Center Programs									
ACE	1	1	1	3	3	1	2	12	2.0
Community Transition							110	110	6.0
Community-ISC								-	4.0
PTP								-	
Capital Center Programs Total	**1**	**1**	**1**	**3**	**3**	**1**	**112**	**122**	**12.00**

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Self-Contained Specialized Programs (SCSP)
Enrollment by School

District Totals	On September 30, 2026	Share
Elementary Total	**481**	47%
Middle School Total	**196**	19%
High School Total	**225**	22%
FLEX Online Total	**1**	0%
Capital Center Prog.Total	**122**	12%
District SCSP Total	**1,025**	**100%**

SPED Outside Placement		**Students**
Aim High		1
Arata Creek		
Cascade Academy		17
Cascade Life Skills		3
Cas/Pac Intensive		3
Columbia Academy K-8		4
Groner		5
Heron Creek		1
Levi Anderson		12
Lifeworks		
Oregon School for the Deaf		4
Pacific Academy		15
Serendipity		4
Spectrum Life Skills		1
Spectrum SEL		3
Wheatley		
Total		**73**

Alternative Placement		**Students**
Alternative Solutions - Merlo		1
Merlo Home		16
Merlo Passages		1
Passages		56
Total		**74**

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Totals by Building
Includes SCSP Students
On September 30, 2026

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Figures do not include Pre-Kindergarten

Elementary Schools*	Comprehensive			SCSP	Total
Aloha Huber Park (K-8th)	830			-	**830**
Barnes	369			-	**369**
Beaver Acres	617			31	**648**
Bethany	397			-	**397**
Bonny Slope	586			-	**586**
Cedar Mill	359			-	**359**
Chehalem	319			19	**338**
Cooper Mountain	334			36	**370**
Elmonica	417			-	**417**
Errol Hassell	259			7	**266**
Findley	519			-	**519**
Fir Grove	329			-	**329**
Greenway	321			28	**349**
Hazeldale	490			22	**512**
Hiteon	440			16	**456**
Jacob Wismer	496			-	**496**
Kinnaman	374			32	**406**
McKay (Closed end of 2025-26)	-			-	**-**
McKinley	643			28	**671**
Montclair	264			-	**264**
Nancy Ryles	424			26	**450**
Oak Hills	404			21	**425**
Raleigh Hills	368			-	**368**
Raleigh Park	233			26	**259**
Ridgewood	317			25	**342**
Rock Creek	329			35	**364**
Sato	811			-	**811**
Scholls Heights	581			24	**605**
Sexton Mountain	371			28	**399**
Springville	677			-	**677**
Terra Linda	272			28	**300**
Vose	532			16	**548**
West TV	281			-	**281**
William Walker	422			33	**455**
Total	**14,385**			**481**	**14,866**

Middle Schools	Comprehensive	Summa	Rachel Carson	SCSP	Total
Cedar Park	443		187	14	**644**
Conestoga	714			25	**739**
Five Oaks	730			30	**760**
Highland Park	630			18	**648**
Meadow Park	586	38		20	**644**
Mountain View	735			18	**753**
Stoller	827	214		24	**1,065**
Tumwater	814	162		26	**1,002**
Whitford	628	108		21	**757**
Total	**6,107**	**522**	**187**	**196**	**7,012**

High Schools	Comprehensive			SCSP	Total
Aloha	1,412			42	**1,454**
Beaverton	1,341			31	**1,372**
Mountainside	1,762			27	**1,789**
Southridge	1,204			37	**1,241**
Sunset	1,673			43	**1,716**
Westview	2,394			45	**2,439**
Total	**9,786**			**225**	**10,011**

Middle & High Options Schools	Comprehensive				Total
ACMA	683				**683**
BASE	860				**860**
Community School	144				**144**
ISB	856				**856**
FLEX Online	359				**359**
Total	**2,902**				**2,902**

2026-27

Projection Accuracy

K-12 General Education	Previous Year 2025-26 Actual	Projected 2026-27 Projected	Projected Change	Projected Change %	Actual 2026-27 Actual	Actual Change	Actual Change %	Projection Error Projection Error #	Projection Error %
Elementary (K-5)	14,843	*14,277*	*(566)*	*-3.81%*	14,274	(569)	-3.83%	(3)	-0.02%
Middle School (6-8)	8,446	*8,207*	*(239)*	*-2.83%*	8,259	(187)	-2.21%	52	0.63%
High School (9-12)	11,531	*11,408*	*(123)*	*-1.07%*	11,356	(175)	-1.52%	(52)	-0.46%
K-12 General Education	**34,820**	***33,892***	***(928)***	***-2.67%***	**33,889**	**(931)**	**-2.67%**	**(3)**	**-0.01%**

Other Programs	Previous Year 2025-26 Actual	Projected 2026-27 Projected	Projected Change	Projected Change %	Actual 2026-27 Actual	Actual Change	Actual Change %	Projection Error Projection Error #	Projection Error %
Early College (EC)	297	*290*	*(7)*	*-2.36%*	290	(7)	-2.36%	-	0.00%
Alternative Programs (AP)	96	*93*	*(3)*	*-3.13%*	74	(22)	-22.92%	(19)	-20.43%
Special Education Outside Placement (SP)	70	*81*	*11*	*15.71%*	73	3	4.29%	(8)	-9.88%
Self-Contained Specialized Programs (SCSP)	984	*1,087*	*103*	*10.47%*	1,025	41	4.17%	(62)	-5.70%
Charter Sc Charter Schools (Arco Iris & HOPE Chinese)	813	*830*	*17*	*2.09%*	836	23	2.83%	6	0.72%
Total	**2,260**	***2,381***	***121***	***5.35%***	**2,298**	**38**	**1.68%**	**(83)**	**-3.49%**
Grand Total*	**37,080**	***36,273***	***(807)***	***-2.18%***	**36,187**	**(893)**	**-2.41%**	**(86)**	**-0.24%**

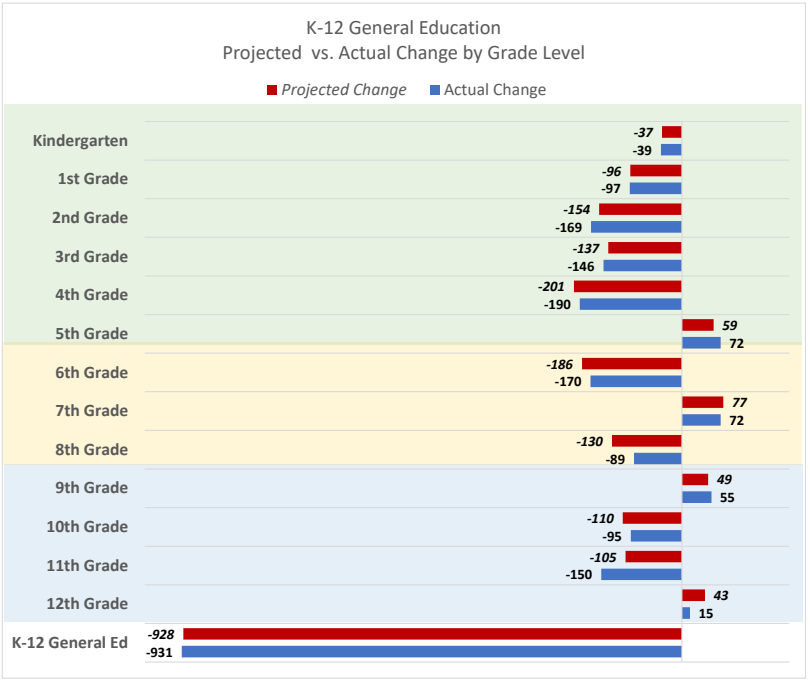
K-12 General Education by Grade Level	Previous Year 2025-26 Actual	Projected 2026-27 Projected	Projected Change	Projected Change %	Actual 2026-27 Actual	Actual Change	Actual Change %	Projection Error Projection Error #	Projection Error %
Kindergarten	2,183	*2,146*	*(37)*	*-1.69%*	2,144	(39)	-1.79%	(2)	-0.09%
1st Grade	2,304	*2,208*	*(96)*	*-4.17%*	2,207	(97)	-4.21%	(1)	-0.05%
2nd Grade	2,457	*2,303*	*(154)*	*-6.27%*	2,288	(169)	-6.88%	(15)	-0.65%
3rd Grade	2,552	*2,415*	*(137)*	*-5.37%*	2,406	(146)	-5.72%	(9)	-0.37%
4th Grade	2,716	*2,515*	*(201)*	*-7.40%*	2,526	(190)	-7.00%	11	0.44%
5th Grade	2,631	*2,690*	*59*	*2.24%*	2,703	72	2.74%	13	0.48%
6th Grade	2,856	*2,670*	*(186)*	*-6.51%*	2,686	(170)	-5.95%	16	0.60%
7th Grade	2,744	*2,821*	*77*	*2.81%*	2,816	72	2.62%	(5)	-0.18%
8th Grade	2,846	*2,716*	*(130)*	*-4.57%*	2,757	(89)	-3.13%	41	1.51%
9th Grade	2,884	*2,933*	*49*	*1.70%*	2,939	55	1.91%	6	0.20%
10th Grade	2,969	*2,859*	*(110)*	*-3.70%*	2,874	(95)	-3.20%	15	0.52%
11th Grade	2,894	*2,789*	*(105)*	*-3.63%*	2,744	(150)	-5.18%	(45)	-1.61%
12th Grade	2,784	*2,827*	*43*	*1.54%*	2,799	15	0.54%	(28)	-0.99%
K-12 General Ed	**34,820**	***33,892***	***(928)***	***-2.67%***	**33,889**	**(931)**	**-2.67%**	**(3)**	**-0.01%**

Notes:
K-12 General Education: Counts include all K-5, K-8, SUMMA, and Rachel Carson programs, and Middle and High School Options programs (e.g. ACMA, CS, ISB, BASE and FLEX Online).

Pre-Kindergarten students excluded from school and district counts, but are listed separately on this summary.

SCSP: These programs are located in buildings throughout the district, but not every building has every program located within it (e.g. ISC, EGC, ALC, etc.)

*Figures here do not include 1 student in EE status listed in the 9/30/2026 ESM



10/1/2026

General Education K-12th Grade Enrollment by Building
2026 Actual and 2035 Forecast

FLO Analytics 2026-2035 Forecast

Utilization of Capacity*

Elementary Buildings	2026 Actual	*2035 Forecast*	*Forecast Change 2026 to 2035*	*Forecast % Change*	Capacity (seats)	*2026*	*2035 Forecast*
Aloha-Huber Park K-8	830	*787*	*(43)*	*-5%*	950	*87%*	*83%*
Barnes	369	*395*	*26*	*7%*	750	*49%*	*53%*
Beaver Acres	617	*635*	*18*	*3%*	800	*77%*	*79%*
Bethany	397	*386*	*(11)*	*-3%*	500	*79%*	*77%*
Bonny Slope	586	*523*	*(63)*	*-11%*	625	*94%*	*84%*
Cedar Mill	359	*318*	*(41)*	*-11%*	475	*76%*	*67%*
Chehalem	319	*304*	*(15)*	*-5%*	450	*71%*	*68%*
Cooper Mountain	334	*290*	*(44)*	*-13%*	450	*74%*	*64%*
Elmonica	417	*404*	*(13)*	*-3%*	450	*93%*	*90%*
Errol Hassell	259	*243*	*(16)*	*-6%*	525	*49%*	*46%*
Findley	519	*429*	*(90)*	*-17%*	625	*83%*	*69%*
Fir Grove	329	*296*	*(33)*	*-10%*	525	*63%*	*56%*
Greenway	321	*307*	*(14)*	*-4%*	475	*68%*	*65%*
Hazeldale	490	*669*	*179*	*37%*	650	*75%*	*103%*
Hiteon	440	*395*	*(45)*	*-10%*	725	*61%*	*54%*
Jacob Wismer	496	*566*	*70*	*14%*	650	*76%*	*87%*
Kinnaman	374	*350*	*(24)*	*-6%*	650	*58%*	*54%*
McKay (Closed end of 2025-26)	-	-					
McKinley	643	*617*	*(26)*	*-4%*	725	*89%*	*85%*
Montclair	264	*228*	*(36)*	*-14%*	325	*81%*	*70%*
Nancy Ryles	424	*370*	*(54)*	*-13%*	550	*77%*	*67%*
Oak Hills	404	*353*	*(51)*	*-13%*	575	*70%*	*61%*
Raleigh Hills (new)	368	*351*	*(17)*	*-5%*	750	*49%*	*47%*
Raleigh Park	233	*231*	*(2)*	*-1%*	325	*72%*	*71%*
Ridgewood	317	*290*	*(27)*	*-9%*	425	*75%*	*68%*
Rock Creek	329	*293*	*(36)*	*-11%*	500	*66%*	*59%*
Sato	811	*756*	*(55)*	*-7%*	825	*98%*	*92%*
Scholls Heights	581	*509*	*(72)*	*-12%*	550	*106%*	*93%*
Sexton Mountain	371	*307*	*(64)*	*-17%*	500	*74%*	*61%*
Springville	677	*614*	*(63)*	*-9%*	700	*97%*	*88%*
Terra Linda	272	*232*	*(40)*	*-15%*	475	*57%*	*49%*
Vose	532	*497*	*(35)*	*-7%*	750	*71%*	*66%*
West Tualatin View	281	*251*	*(30)*	*-11%*	375	*75%*	*67%*
William Walker	422	*440*	*18*	*4%*	625	*68%*	*70%*
Elementary School Total	**14,385**	***13,636***	***(749)***	***-5%***	**19,250**	***75%***	***71%***

General Education K-12th Grade Enrollment by Building
2026 Actual and 2035 Forecast

Middle School Buildings	2026 Actual	2035 Forecast	Forecast Change 2026 to 2035	Forecast % Change	Capacity (seats)	Utilization of Capacity 2026	Utilization of Capacity 2035 Forecast
Cedar Park + RC	630	*547*	*(83)*	*-13%*	780	*81%*	*70%*
Conestoga	714	*582*	*(132)*	*-18%*	800	*89%*	*73%*
Five Oaks	730	*592*	*(138)*	*-19%*	980	*74%*	*60%*
Highland Park	630	*498*	*(132)*	*-21%*	780	*81%*	*64%*
Meadow Park + SUMMA	624	*558*	*(66)*	*-11%*	720	*87%*	*78%*
Mountain View	735	*598*	*(137)*	*-19%*	840	*88%*	*71%*
Stoller + SUMMA	1,041	*815*	*(226)*	*-22%*	920	*113%*	*89%*
Tumwater + SUMMA	976	*736*	*(240)*	*-25%*	1,060	*92%*	*69%*
Whitford + SUMMA	736	*546*	*(190)*	*-26%*	780	*94%*	*70%*
Middle School Total	**6,816**	***5,472***	***(1,344)***	***-20%***	**7,660**	***89%***	***71%***

High School Buildings	2026 Actual	2035 Forecast	Forecast Change 2026 to 2035	Forecast % Change	Capacity (seats)	Utilization of Capacity 2026	Utilization of Capacity 2035 Forecast
Aloha	1,412	*1,189*	*(223)*	*-16%*	1,668	*85%*	*71%*
Beaverton	1,341	*1,044*	*(297)*	*-22%*	1,693	*79%*	*62%*
Mountainside	1,762	*1,369*	*(393)*	*-22%*	2,117	*83%*	*65%*
Southridge	1,204	*997*	*(207)*	*-17%*	1,917	*63%*	*52%*
Sunset	1,673	*1,386*	*(287)*	*-17%*	2,191	*76%*	*63%*
Westview	2,394	*1,976*	*(418)*	*-17%*	1,992	*120%*	*99%*
High School Total	**9,786**	***7,961***	***(1,825)***	***-19%***	**11,579**	***85%***	***69%***

Option School Buildings	2026 Actual	2035 Forecast	Forecast Change 2026 to 2035	Forecast % Change	Capacity (seats)	Utilization of Capacity 2026	Utilization of Capacity 2035 Forecast
ACMA (6-12th)	683	*690*	*7*	*1%*	672	*102%*	*103%*
BASE (6-12th)	860	*861*	*1*	*0%*	822	*105%*	*105%*
Community (9-12th)	144	*122*	*(22)*	*-15%*	498	*29%*	*24%*
ISB (6-12th)	856	*831*	*(25)*	*-3%*	548	*156%*	*152%*
Option School Total	**2,543**	***2,504***	***(39)***	***-2%***	**2,540**	***100%***	***99%***

FLEX Online**	2026 Actual	2035 Forecast	Forecast Change 2026 to 2035	Forecast % Change	Capacity (seats)	Utilization of Capacity 2026	Utilization of Capacity 2035 Forecast
K-5th	49	*47*	*(2)*	*-4%*			
6-8th	90	*48*	*(42)*	*-47%*			
9-12th	220	*260*	*40*	*18%*			
FLEX Online Total	**359**	***355***	***(4)***	***-1%***			

	2026 Actual	2035 Forecast	Forecast Change 2026 to 2035	Forecast % Change	Capacity (seats)	Utilization of Capacity 2026	Utilization of Capacity 2035 Forecast
Grand Total	**33,889**	***29,928***	***(3,961)***	***-12%***	**41,028**	***83%***	***73%***

*Capacity refers to permanent capacity, does not include portable classrooms

** FLEX Online does not have a building capacity

Dr. Tony Smith
Superintendent
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MEMORANDUM

To: Beaverton School Board
From: Dr. Tony Smith, Superintendent
Date: October 2026
Subject: Strong & Sustainable Beaverton: Financial Sustainability and Right-Sizing Framework

Purpose: Information, board participation and direction-setting for future work

This memo introduces a proposed two-part process to strengthen Beaverton School District's long-term educational and financial sustainability. The goal is to build a Strong & Sustainable Beaverton — a district that is educationally excellent, equitable, financially responsible, operationally coherent and positioned to serve students well for years to come.

This document is informational and is intended to invite board participation in shaping the framework, decision criteria, community engagement and future governance decisions.

The board *is not* being asked to establish budget reduction targets, approve school closures, or endorse a specific future configuration of the district at this time. The board *is* asked to give direction on moving forward with the proposed timeline, and commit to participation in shaping and engaging with the public process and making future governance decisions informed by the process.

Identifying the Problem

BSD is serving materially fewer students while facing an ongoing structural financial imbalance.

The district's enrollment peaked at 40,629 students (not including charter schools) in fall 2019, shortly before the start of the COVID-19 pandemic. In fall 2026, enrollment is 35,351 students — a decrease of 5,278 students or 13% over the past 7 years.

In that time span, two new schools have opened (Tumwater Middle School and Flex Online School) and one very small elementary school has closed (McKay Elementary School).

Enrollment is projected to decline by another 3,000 to 7,000 students over the next decade.

At the same time, the September 1, 2026 financial projection shows annual deficits of approximately:

Beaverton School District does not discriminate in any programs or activities 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.

- $17.3 million in 2026–27
- $42.1 million in 2027–28
- $46.3 million in 2028–29
- $60.1 million in 2029–30

The district is fortunate to have reserve funds – currently totaling nearly $168 million – to help mitigate the need to make sudden drastic budget cuts to align expenditures with incoming resources. In recent years, BSD has used budget reserves to phase in spending reductions over time, rather than making larger immediate cuts to fully align ongoing revenues and expenditures.

However, the district cannot indefinitely continue drawing down reserves to fund recurring expenditures. The growing structural budget deficit and continued enrollment decline mean that important decisions must be made to rightsize the district in the near future.

Establishing the Question

The first responsibility of the process should be to establish a common understanding of the size and causes of the structural imbalance, distinguish recurring challenges from temporary conditions, and understand the educational and operational implications of potential solutions.

Consequently, our focus extends far beyond determining which budget areas to reduce and how many schools we can sustain.

Instead, we must ask:

> *How do we design an educational system that ensures outstanding outcomes for every student while establishing long-term alignment across student enrollment, staffing models, academic offerings, facility operations and fiscal resources?*

Considering Previous Planning

Our efforts do not begin in a vacuum. The Right-Sizing Beaverton strategy expands upon and updates the district's 2021 Long-Range Facility Plan (LRFP). That foundational document identified educational programming, student enrollment, building capacity and facility conditions as core components of long-term operational planning. Furthermore, it embedded an equity lens while explicitly establishing the alignment of school capacity with projected student demographics as a key district priority. Additionally, the 2021 LRFP acknowledged that shifting demographics and reduced enrollment might lead to surplus facility capacity, proposing remedies including boundary realignments and, where conditions warrant, school consolidation.

The Long-Range Facility Planning Committee in 2024–2026 furthered this work and led to the development of guidelines for long-range planning, including school enrollment parameters to consider where solutions for enrollment balancing should be considered.

However, the contemporary challenges facing BSD compel us to broaden our approach beyond this initial scope.

While the previous endeavor functioned primarily as a capital-planning and facilities model, our current initiative must evolve into a comprehensive districtwide sustainability framework. This expanded vision systematically integrates:

- instructional excellence

- student enrollment trends
- staffing allocations
- academic programming
- attendance boundaries
- facility usage
- student transportation
- educational equity
- operational efficacy
- and multiyear fiscal health

Considering Recent Examples

We can gain valuable insights from other school districts that have successfully navigated comparable circumstances.

Our review of **Bellevue School District** reinforces the value of engaging the community before developing a specific financial proposal, presenting actual recommendations and alternatives, seeking *another* round of community feedback on those recommendations, and then explaining what changed as a result of that feedback.

Boulder Valley School District provides another useful lesson: When declining enrollment affects multiple schools and communities, engagement should begin with the values the community wants to protect *before* specific consolidation or closure recommendations are developed. Its experience also demonstrates the importance of looking at schools within a broader regional and system context rather than considering individual buildings in isolation.

Fulton County Schools' G.L.I.D.E. financial sustainability process offers a complementary model. Fulton treats financial sustainability as a districtwide responsibility involving cross-functional teams, stakeholder engagement, financial modeling, cost efficiencies, revenue strategies, board parameters and long-term sustainability tests.

We should learn from each without attempting to replicate any one district's approach. Beaverton's process must reflect our students, community, financial conditions, educational priorities and governance structure.

Maintaining What We Value

Financial sustainability is not separate from instructional improvement. A district that continually uses reserves to support recurring expenditures eventually has fewer choices about where resources can be invested. Similarly, maintaining programs, staffing models and facilities that are no longer appropriately aligned with enrollment can make it more difficult to concentrate resources on strong instruction and equitable student opportunities.

This work directly advances the superintendent priorities of:

- system coherence
- stronger Tier 1 instruction
- leadership development
- continuous improvement
- equity
- long-term sustainability

This work also represents an important transition in my 100-Day Plan and Look, Listen, Learn, Lead approach. One hundred days is a meaningful period of time, nearly half of a school year, and yet it is still a relatively short period in which to fully know and understand a community as large, diverse and complex as Beaverton.

The next phase should therefore not be a rush from learning to predetermined solutions. It should continue learning while moving toward action through a deliberate process designed to:

- restore trust
- make difficult tradeoffs transparent
- collaborate authentically with our community
- foster collective ownership of both the challenges we face and the future we create

Strong & Sustainable Beaverton: A Two-Phased Approach

I recommend two connected but distinct workstreams:

Financial Sustainability | October 2026 – March 2027

October 2026
Understand: Establish the financial and enrollment baseline and identify the major drivers of the structural deficit. Educate the community about current conditions and decisions to be made.

October–November 2026
Listen: Engage staff, students, families, school leaders and community members to provide open-ended input regarding educational priorities, services to protect, opportunities to work differently, and potential tradeoffs.

November–December 2026
Reflect: Synthesize engagement and report back to the community what we've heard. Apply community voice to development of potential options for budget changes.

December–January 2027
Design: Develop and model options across staffing, schools, programs, central services and operations, including seeking efficiencies and potential revenue strategies.

February 2027
Test & Refine: Engage the community to provide feedback on actual proposals and impacts. Consider community voice and make revisions where appropriate.

March 2027
Recommend: Bring forward a multiyear financial sustainability strategy that guides development of the 2027–28 budget and future financial planning.

May–June 2027
Adopt: Present the superintendent's recommended budget for consideration and action by the budget committee in May and adoption by the school board in June.

Right-Sizing Beaverton | March 2027 – December 2027

March–April 2027
Understand: Develop school-level profiles incorporating enrollment, projections, capacity,

utilization, facility condition, programs, staffing, costs, geography, transportation, demographics, boundaries and equity considerations.

May–June 2027
Listen: Engage community around the future student experience, educate about factors that impact school offerings, and ask the community to affirm the criteria that should guide potential changes. Report back to community about what we've heard.

July–September 2027
Design: Plan a public process and clear criteria for decisions. Apply the criteria and develop proposed high-level scenarios for consideration.

September–October 2027
Review: Present proposed high-level scenarios and gather community input.

November 2027
Refine & Recommend: Complete educational, equity, operational and financial analyses of potential options, and bring forward a superintendent recommendation of specific structural changes to best meet community values and operational realities.

November–December 2027
Listen & Consider: Engage community feedback on proposed structural changes.

December 2027
Decide: Deliberate and take board governance action on structural changes.

Fall 2028
Implement: Implement approved structural changes beginning in the 2028–29 school year, allowing sufficient time to support staff, students and families, including receiving school communities, through transitions.

How We Make Decisions

Community voice is critical to these processes. Before developing proposals and plans, we will seek input from our community about their ideas and values for the future of our schools. Before determining proposals, we will ask for community feedback on the possibilities. Before identifying recommended structural changes impacting specific schools, we will hear input on the potential impacts of such changes.

The right-sizing process may examine boundary changes, program relocation, grade reconfiguration, facility repurposing, and school closure and consolidation. While the district cannot continue to provide a full and rich educational experience with the same configuration of schools in the face of a substantial decline in the number of students attending them, no individual school and no specific number of schools are predetermined for closure.

Before moving toward decisions, I recommend that we develop a proposed set of clear criteria for decision-making and invite the board and community to affirm and refine them. Potential criteria should include educational quality; equity; enrollment projections; capacity and utilization; facility condition; geography and feeder coherence; program access; staffing and class size; transportation; community impact; net recurring financial impact; and implementation feasibility. However, no single metric should determine the future of a school.

Similarly, community engagement will be meaningful, but it should not be represented as a referendum. The community has a critical role in identifying values, consequences, priorities and perspectives. The administration has a responsibility to conduct the analysis and develop options. The superintendent has a responsibility to make a well-considered recommendation. Where board action is required, the board has the governance responsibility to deliberate and decide.

What We Expect

At the conclusion of this work, we should expect more than a balanced budget or a different configuration of buildings. We should have:

1. **A transparent and collaborative decision-making process** that strengthens trust and creates greater collective ownership of BSD's future.
2. **A sustainable multiyear financial model** that aligns recurring revenues and expenditures and maintains responsible reserves.
3. **A school system appropriately aligned with current and projected enrollment**, rather than enrollment patterns of the past.
4. **Resources increasingly concentrated on strong Tier 1 instruction**, student supports and equitable educational opportunities.
5. **Greater coherence** among enrollment, staffing, programs, boundaries, facilities, transportation and financial planning.
6. **A deliberate 2028–29 implementation strategy** that supports students, employees, families and communities affected by change.

Making Our Plan

At this stage, I am not asking the board to approve school closures, establish a predetermined reduction target, or endorse a particular future configuration of the district.

I am inviting the board to participate with me in shaping the process. That includes helping establish the questions we should answer, participating in community engagement, affirming the criteria and governance guardrails that will guide our analysis, examining the tradeoffs that emerge, and receiving regular public updates as the work progresses.

The decisions ahead will not all be easy. But our responsibility is larger than solving an immediate budget problem. It is to build a Strong & Sustainable Beaverton — one capable of delivering on our commitment to Belong, Believe, Achieve while creating the educational, organizational and financial conditions necessary for students to thrive for years to come.

The work ahead should therefore be grounded in a simple commitment:

- Understand our current reality.
- Listen to our community.
- Define what we value.
- Design the system our students need.
- Make responsible decisions.
- Build a Beaverton School District that is strong and sustainable for the future.

Strong & Sustainable Beaverton: A Two-Phased Approach

Two connected but distinct workstreams to build a sustainable financial future and right-size our schools, supporting the best possible experience for every student.

Financial Sustainability | October 2026 – March 2027

October 2026
Understand
Establish the financial and enrollment baseline and identify the major drivers of the structural deficit. Educate community about current conditions and decisions to be made.

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Engage staff, students, families, school leaders and community members to provide open-ended input regarding educational priorities, services to protect, opportunities to work differently, and potential tradeoffs.

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Synthesize engagement and report back to the community what we've heard. Apply community voice to development of potential options for budget changes.

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Develop and model options across staffing, schools, programs, central services and operations, including seeking efficiencies and potential revenue strategies.

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Beaverton School District | *Belong. Believe. Achieve.*

This infographic visualizing the proposed timeline was produced by generative artificial intelligence using human-provided text.

CONSENT AGENDA — ITEM FOR ACTION

PERSONNEL ACTIONS

SUMMARY
A list of employees is being recommended by the superintendent for approval of routine personnel actions, including employment, leaves of absence, and resignation/retirement of teachers and administrators.

RECOMMENDATION
The superintendent recommends the board approve the personnel actions as submitted in board materials.

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BEAVERTON SCHOOL DISTRICT
School Board Work Session
District Office, 1260 NW Waterhouse Ave.
Tuesday, September 15, 2026

DRAFT MEETING MINUTES – BOARD WORK SESSION SEPTEMBER 15, 2026

Board Members Present:
Justice Rajee, Chair
Dr. Melissa Potter, Vice-Chair
Sunita Garg
Dr. Vân Truong
Dr. Karen Pérez
Syed Qasim
Dr. Tammy Carpenter

Board Members Absent:

Staff Present:

Dr. Tony Smith	Superintendent
Dr. Shelly Reggiani	Associate Superintendent for Teaching & Learning
Casey Waletich	Associate Superintendent for Operations & Support Services
Jessica Jones	Chief Financial Officer
Kerry Delf	Chief of Staff
Steve Langford	Chief Information Officer
Steffanie Frost	Chief Human Resources Officer
Patrick Preston	Director of Communications
Karla Barrett-Curtis	Executive Assistant and School Board Secretary
Marcie Davis	Executive Assistant

The meeting was open to the public to attend in person or via livestream on YouTube.

I. OPEN MEETING

Chair Justice Rajee called the work session to order at 6:22 p.m. He noted that all seven board members were present.

II. BUDGET OVERVIEW & PLANNING PROCESS

Chief Financial Officer Jessica Jones presented an overview of the district's financial outlook and budget development process. She reviewed enrollment trends, revenue projections, staffing considerations, and anticipated financial challenges, including declining enrollment, increased retirement costs, and the loss of federal relief funding. Staff also discussed a multi-year budget reduction strategy, the timeline for budget development, and opportunities for stakeholder and community engagement.

III. CLOSE MEETING

Chair Justice Rajee adjourned the work session at 6:51 p.m.

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BEAVERTON SCHOOL DISTRICT
School Board Meeting
District Office, 1260 NW Waterhouse Ave.
Tuesday, September 15, 2026

DRAFT MEETING MINUTES – BOARD BUSINESS MEETING SEPTEMBER 15, 2026

Board Members Present:
Justice Rajee, Chair
Dr. Melissa Potter, Vice Chair
Sunita Garg
Dr. Vân Truong
Dr. Karen Pérez
Syed Qasim
Dr. Tammy Carpenter

Board Members Absent:

Staff Present:

Dr. Tony Smith	Superintendent
Dr. Shelly Reggiani	Associate Superintendent for Teaching & Learning
Casey Waletich	Associate Superintendent for Operations & Support Services
Kerry Delf	Chief of Staff
Steffanie Frost	Chief Human Resources Officer
Steve Langord	Chief Information Officer
Jessica Jones	Chief Financial Officer
Patrick Preston	Director of Communications
Lori Krumm	Executive Director for Student Services
Jill O'Neill	Executive Director for Teaching & Learning
Veronica Galvan	Director for Curriculum & Instruction
Andrew Robinson	Assistant Director for Multilingual Programs
Jason Guchereau	Manager of Finance
Rosa Garcia	TOSA, Student Behavior Specialist
Jenny Sanchez	Federal Program Facilitator
Aaron Boyle	Director of Facilities Development
Karla Barrett-Curtis	Executive Assistant and School Board Secretary
Marcie Davis	Executive Assistant

The meeting was open to the public to attend in person or via livestream on YouTube.

I. OPEN MEETING

Chair Justice Rajee called the meeting to order at 7:00 p.m. He noted that all seven board members were present. The board reviewed the agenda and did not request any changes.

II. STUDENT PERFORMANCES & RECOGNITIONS

A. Budget & Financial Reporting Excellence

Beaverton School District does not discriminate in any programs or activities 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.

Chief Financial Officer Jessica Jones and Finance Manager Jason Guchereau were acknowledged on behalf of the business office for the national recognitions awarded to the district by ASBO International and GFOA for excellence and transparency in budget development and financial reporting. The awards recognized the district's 2026-27 adopted budget and 2024-25 comprehensive financial report.

III. SUPERINTENDENT'S REPORT

Dr. Smith shared reflections from visits to district schools at the start of the school year and expressed appreciation for educators, support staff, administrators and families. He reaffirmed the district's commitment to transparency and student success through ongoing state funding challenges.

IV. PUBLIC COMMENTS

A. Comments by Employee Groups

BEA President Adam Oyster-Sands and OSEA representative Kyrsti Sackman commented to the board.

B. Comments by Community Members

The board heard public comments from nine speakers. The board also received 30 written comments.

V. ITEMS FOR INFORMATION

A. Summer Programs Report

Staff reported that more than 4,000 students participated in summer learning opportunities, including Extended School Year services, kindergarten readiness, multilingual learner programs, Native American enrichment and high school credit recovery. Students earned 1,237 high school credits through summer programming. The district was able to provide expanded summer programming thanks to having received state grant funding for summer learning.

B. Integrated Programs Annual Report

Oregon provides funds for certain integrated programs, including Student Investment Account, High School Success and Perkins-funded CTE programs, to help increase academic achievement for all students, reduce academic disparities for historically underserved groups of students, and meet students' academic and behavioral health needs. An annual report is presented to the board and the community. Staff presented the report for 2025-26, with updates including early literacy grant implementation, secondary reading supports, career pathway exploration and use of the Zello career planning platform under SB3 requirements.

C. Bond Program Update

Staff provided an update on 2022 bond projects, noting the completion of the Beaverton High School rebuild, HVAC improvements at Aloha and Sunset High Schools, ongoing seismic and roofing projects, and continued construction of the Allen Transportation maintenance facility.

D. Long-Range Facility Planning Guidelines

Staff reviewed the district's long-range facility planning guidelines approved by the board in March 2026, and discussed next steps including annual enrollment trend reporting, building utilization studies, and policy review. The board indicated that the superintendent should develop a process and timeline for engaging community and developing recommendations for the board to make long-range planning decisions.

E. Financial Report

Chief Financial Officer Jessica Jones presented the monthly financial report and provided an overview of the district's current financial position.

VI. CONSENT AGENDA

A. Personnel

B. Meeting Minutes

i. School Board Retreat, August 4, 2026
ii. School Board Work Session, August 11, 2026
iii. School Board Business Meeting, August 11, 2026

C. Public Contracts

Dr. Karen Pérez moved to approve the consent agenda as submitted. Dr. Melissa Potter seconded. The motion passed unanimously 7:0.

VII. ITEMS FOR ACTION

A. OSBA Board Nomination

Dr. Karen Pérez moved to nominate Syed Qasim for OSBA Board Position 15 representing the Washington Region. Dr. Melissa Potter seconded. The motion passed unanimously, 7:0.

B. Board Policy Revisions

i. KNA Immigration Enforcement on District Property

Dr. Karen Pérez moved to adopt the revised Board Policy KNA, Immigration Enforcement on District Property, including language clarifying that school property includes parking lots and grounds. Dr. Melissa Potter seconded. The motion passed unanimously 7:0.

VIII. ITEMS FOR ACTION AT A FUTURE MEETING

A. Board Goals

The board discussed proposed 2026-27 board goals focused on data-informed decision-making, legislative advocacy and supporting the superintendent's work.

B. Superintendent Goals & Evaluation Process

The board reviewed the superintendent's proposed priority goals and evaluation framework for 2026-27.

C. Declaration of Surplus Property

The board reviewed a proposed property disposition related to an equal-area property exchange involving a property lot line between Raleigh Park Elementary School and THPRD.

D. Board Policy Revisions

i. CBA Qualifications and Duties of the Superintendent
ii. CBG Evaluation of the Superintendent

The board reviewed OSBA-recommended revisions to Policies CBA and CBG for future consideration.

IX. BOARD COMMUNICATION

Board members shared updates regarding district events, school visits, community engagement activities and educational initiatives occurring throughout the district.

X. CLOSE MEETING

Chair Justice Rajee adjourned the meeting at 9:44 p.m.

draft

CONSENT AGENDA

REVIEW SCHOOL BOARD POLICY DFA

SUMMARY
Board Policy DFA Investment of Funds requires annual review by the administration and school board.

BACKGROUND
Board Policy DFA guides the investment of short-term operating funds and capital project funds. 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 review. There are no changes recommended.

RECOMMENDATION
The school board is required to annually review this policy. No changes are recommended and no other action is needed.

Beaverton School District does not discriminate in any programs or activities 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

ITEM FOR ACTION

2026–27 BOARD GOALS

SUMMARY
The board sets annual goals. In its fall retreat and a following board meeting, the board discussed goals for 2026–27 to be articulated and approved in a future meeting.

BACKGROUND
The board annually develops and approves goals for its work. The finalized goals will guide board focus and decision-making throughout the school year.

In the board's fall retreat, board members discussed potential goals for the board's work for the 2026–27 school year and invited additional board member input. The board again discussed the goals in the September business meeting, and reached consensus to establish goals regarding increasing incorporation of data in board processes and engaging in legislative advocacy in support of schools. Board leadership then worked to draft language articulating the goals the board had developed for the board to consider for approval.

The draft goals for consideration are as follows:

- **Strengthen Strategic Oversight Through Data:** The board will increase the use of data tools in our agendas for business meetings and work sessions. Board leadership will work with the superintendent to develop a process to review interim assessment data in public meetings three times per year. By April 2026, the board will establish a consistent strategic plan monitoring cycle that enables the board to assess progress toward strategic goals, identify emerging trends, and determine when adjustments to strategy or resource allocation are warranted. Board discussions will consistently move beyond "What is the data?" to "What is the data telling us, what are we learning, and what if anything should we do differently?"

- **Legislative Advocacy:** For the 2027 Legislative Session, the board will continue to collaborate with regional partners and advocate to legislators to advance state-level actions that support Oregon K-12 education, the Beaverton School District, and our students.

RECOMMENDATION
It is recommended that the board take action to approve board goals for 2026-27, formalizing the goals the board agreed on in earlier discussions.

SUGGESTED MOTION
I move to approve the board goals as submitted.

Beaverton School District does not discriminate in any programs or activities 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.

ITEM FOR ACTION

SUPERINTENDENT GOALS & EVALUATION PROCESS

SUMMARY
The board formally evaluates the superintendent's job performance each year. The superintendent's performance goals and process for evaluation are established in advance.

BACKGROUND
By board policy and contractual agreement, the board will formally evaluate the superintendent's job performance annually. The evaluation provides the opportunity for the board to assess progress on district priorities. The board and superintendent discussed the goals and process for evaluating the superintendent's performance in a work session on August 11 and the board meeting on September 15.

RECOMMENDATION
It is recommended that the board approve a process for evaluating the superintendent's performance.

SUGGESTED MOTION
I move to approve the superintendent evaluation process as submitted.

Beaverton School District does not discriminate in any programs or activities 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.

Beaverton School District
Superintendent Evaluation Process 2026–27
Dr. Tony Smith, Superintendent

By board policy and contractual agreement, the board will formally evaluate the superintendent's job performance once each year.

The time invested in providing meaningful feedback in the assessment of the superintendent's performance, and the progress made in meeting the goals specified by the board for the superintendent, is critical to the success of the district. The evaluation provides the opportunity for the board to assess the district's progress on district priorities. Included is the superintendent's assessment and self-evaluation of progress made toward accomplishing district priorities.

The evaluation for the 2026–27 school year includes the following goal areas established with the superintendent:

Pillar I – Instructional Excellence
- Goal 1: Build a Coherent Continuous Improvement System
- Goal 2: Strengthen Tier I Instruction
- Goal 3: Develop Leadership Capacity Through Reciprocal Accountability

Pillar 2 – Organizational Excellence
- Goal 4: Optimize District Resources
- Goal 5: Optimize District Facilities
- Goal 6: Build Public Trust Through Transparency and Collaboration

Evaluation Process

Board leadership will schedule two executive sessions to conduct the evaluation of the superintendent.

During the first executive session, board members will first meet with the superintendent to share his self-assessment and evidence of achievement. The superintendent then will depart from the executive session, and the board will discuss the evaluation and assessment of the superintendent's job performance. Based upon this discussion the board chair or designee will prepare the final evaluation from the board to share and discuss with the superintendent at a subsequent executive session.

The board will strive for consensus when developing the final evaluation, but in cases where consensus cannot be reached, the majority opinion will be reflected in the final written evaluation. Comments that are not agreed on by a majority of the board will not be included.

In a second executive session, the board will meet with the superintendent to share and discuss the performance evaluation.

Board leadership will develop a summary report on the outcome of the annual evaluation of the superintendent and will present it in a public meeting.

Timeline

Fall 2026
Board approves annual goals for the superintendent
Board approves the process and instrument for the superintendent performance evaluation

January–February 2027
Superintendent provides mid-year report on progress toward goals in public session
Board meets with superintendent in executive session for mid-year performance check-in

March 2027
Board reviews evaluation process, timeline and instrument

April 2027
Superintendent meets with board in executive session and provides a self-evaluation
Board meets in executive session to develop the performance evaluation

May 2027
Board meets with superintendent in executive session and conducts the evaluation

May–June 2027
Summary of final evaluation is prepared for public distribution
Evaluation summary is presented during a public board meeting

draft

STRATEGIC INITIATIVE 1

Build a Coherent Continuous Improvement System

Purpose

Develop one districtwide continuous improvement system that aligns the strategic plan, school improvement plans, departmental priorities, performance management, progress monitoring and differentiated supports around a common improvement process.

Priority Actions

Year One

- Develop plan to align district priorities, school improvement plans and department goals to the strategic plan.
- Develop districtwide data protocols that promote learning, reflection and improvement rather than compliance.
- Establish district baseline measures and organizational routines that will inform future performance targets.

Year Two

- Align district priorities, school improvement plans and department goals into a coherent improvement framework aligned to the strategic plan.
- Establish common planning and continuous improvement cycles across the district.
- Implement consistent progress-monitoring routines across schools and departments.
- Differentiate supports based on school context, implementation evidence and identified needs.

Comments:

draft

STRATEGIC INITIATIVE 2

Strengthen Tier I Instruction

Purpose

Establish consistent districtwide expectations for high-quality Tier I instruction by aligning curriculum, instructional practices, professional learning, coaching, supervision and feedback around evidence-based teaching and learning.

Priority Actions

Year One

- Establish a shared instructional framework that defines high-quality teaching and learning.
- Reinforce literacy and mathematics as foundational instructional priorities while supporting excellence across all content areas.
- Ensure consistent implementation of high-quality instructional materials.
- Strengthen classroom observation and feedback practices.

Year Two

- Strengthen instructional practices that reduce opportunity gaps and prepare students with the knowledge, skills and dispositions necessary for college, careers and civic life.
- Expand job-embedded professional learning and instructional coaching.
- Increase student engagement, belonging and rigorous learning experiences.

Comments:

draft

STRATEGIC INITIATIVE 3

Develop Leadership Capacity Through Reciprocal Accountability

Purpose

Develop leadership capacity throughout the organization by establishing clear expectations, differentiated coaching, meaningful feedback and reciprocal accountability so every adult contributes to continuous improvement and organizational excellence.

Priorities

Year One

Teachers

- Curriculum-aligned professional learning

School Leaders

- Leadership coaching
- Instructional leadership development
- Strategic use of evidence

Principal Supervisors & Central Office Leaders

- Coach and develop school leaders and instructional leaders
- Strengthen cross-functional collaboration

Year Two

Teachers

- Clear instructional expectations
- Ongoing coaching and feedback

School Leaders

- Continuous improvement planning
- Strengthening collaborative school cultures

Principal Supervisors & Central Office Leaders

- Align district supports across departments
- Build a consistent district leadership model

Comments:

draft

STRATEGIC INITIATIVE 4

Optimize District Resources

Purpose

Champion a transparent and sustainable resource allocation and support model that aligns financial, human and organizational resources with district priorities while supporting long-term fiscal sustainability.

Priority Actions

Year One

- Modernize systems and technology.
- Maintain multi-year financial planning processes.
- Establish program review and resource evaluation processes.
- Enhance transparency throughout the budget development process.

Year Two

- Streamline organizational processes.
- Align staffing with enrollment trends and district priorities.
- Protect investments closest to students and classrooms.
- Strengthen strategic resource allocation.

Comments:

draft

STRATEGIC INITIATIVE 5

Optimize District Facilities

Purpose

Implement a long-range facilities planning framework that aligns enrollment trends, educational programming, facility conditions and community priorities to support exceptional learning environments and long-term sustainability.

Priority Actions

Year One

- Maintain robust long-range enrollment forecasting.
- Conduct facility utilization reviews.
- Develop transparent decision-making criteria for future facilities decisions.
- Evaluate attendance boundary opportunities.
- Evaluate multiple strategies before considering school consolidation.
- Engage students, staff, families and community members throughout the planning process.

Year Two

- Plan for a potential capital bond measure to support high-quality learning environments.
- Prioritize deferred maintenance planning.
- Align capital planning with long-term enrollment trends.

Comments:

draft

STRATEGIC INITIATIVE 6

Build Public Trust Through Transparency and Collaboration

Purpose

Strengthen trust through authentic engagement, transparent communication, evidence-informed decision-making and meaningful partnerships with students, staff, families, labor partners and the broader community.

Priority Actions

Year One & Two

- Communicate openly and consistently.
- Engage stakeholders early in decision-making processes.
- Build collaborative partnerships with employee associations and community organizations.
- Increase transparency around district priorities and resource decisions.
- Create consistent opportunities for feedback and dialogue.
- Clearly communicate district progress throughout the year

Comments:

A. Overall effectiveness summary statement:

B. Suggestions for areas of focus for the upcoming year.:

draft

ITEM FOR ACTION

DECLARATION OF SURPLUS PROPERTY: RALEIGH PARK ELEMENTARY SCHOOL

SUMMARY
Board authorization is required to dispose of any real property. At Raleigh Park Elementary School, a property line survey identified that improvements by THPRD and the district have been constructed across the common property line. It is recommended that the board make a declaration of surplus property and authorize its disposition, to allow the lot line to be adjusted to address this condition.

BACKGROUND
In June 2021, the board allocated 2014 capital bond reserve to enhance security at elementary schools by installing fencing where gaps in perimeter fencing existed. Raleigh Park Elementary School was identified as a site requiring additional perimeter security fencing. In 2024, as a part of the security fencing project, the Facilities Development team completed a property line survey of the school property, and it was discovered that both Beaverton School District and Tualatin Hills Park and Recreation District (THPRD) have constructed improvements across a common property line.

District staff have met with THPRD staff and have agreed to pursue a lot line adjustment application with Washington County. The lot line adjustment will move the property line so that each district's improvements are located on the appropriate district property. The districts have submitted a proposed lot line adjustment and have received approval of the lot line adjustment application from the county.

To finalize the adjusted property line, the districts must submit a final plat survey with the Washington County Surveyor Office. Prior to submitting the survey to the county, board policy DN requires the school board to declare the subject portion of the Raleigh Park Elementary School property as surplus. The THPRD board will do the same for its property. If approved, once the surplus declarations are made, the district will file the survey with the county to finalize the new property line.

Because the encroachments along the common property line between Raleigh Park Elementary School and THPRD's Raleigh Park have existed for many years without prior comment from Beaverton School District, and an agreement is pending to adjust lot lines with a neutral impact on net property holdings, it is recommended for the board to declare the subject area as surplus to enable this lot line adjustment.

RECOMMENDATION
It is recommended that the board take action to declare the identified property along the common property line at Raleigh Park Elementary School as surplus and authorize the district to take steps to correct the existing condition.

SUGGESTED MOTION
I move to declare the identified common property line at Raleigh Park Elementary School as surplus and authorize its disposition as presented.

Beaverton School District does not discriminate in any programs or activities 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.

Surplus Property at Raleigh Park Elementary School

School Board Business Meeting

September 15, 2026

BEAVERTON SCHOOL DISTRICT

Overview

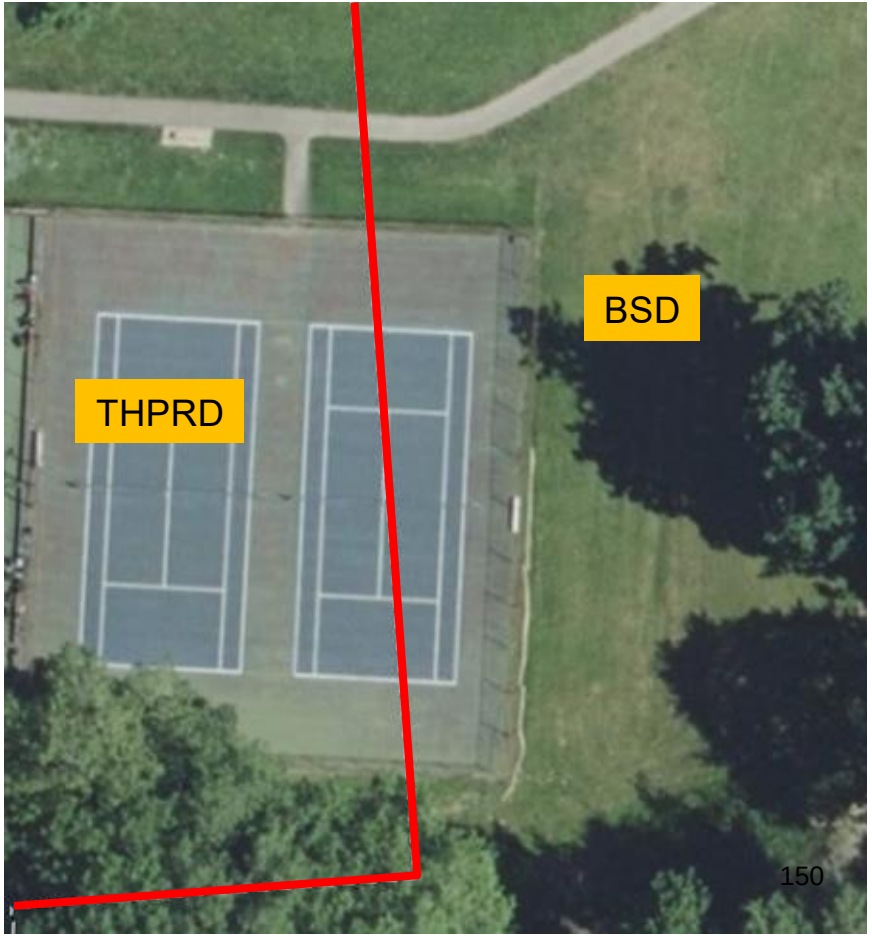
- THPRD maintains approximately 6 acres of BSD north of the school's field. The 6 acres effectively operate as a part of THPRD's Raleigh Park.
- There exist long term district encroachments on both BSD and THPRD properties.
- Move property lines to place district improvements on district property.



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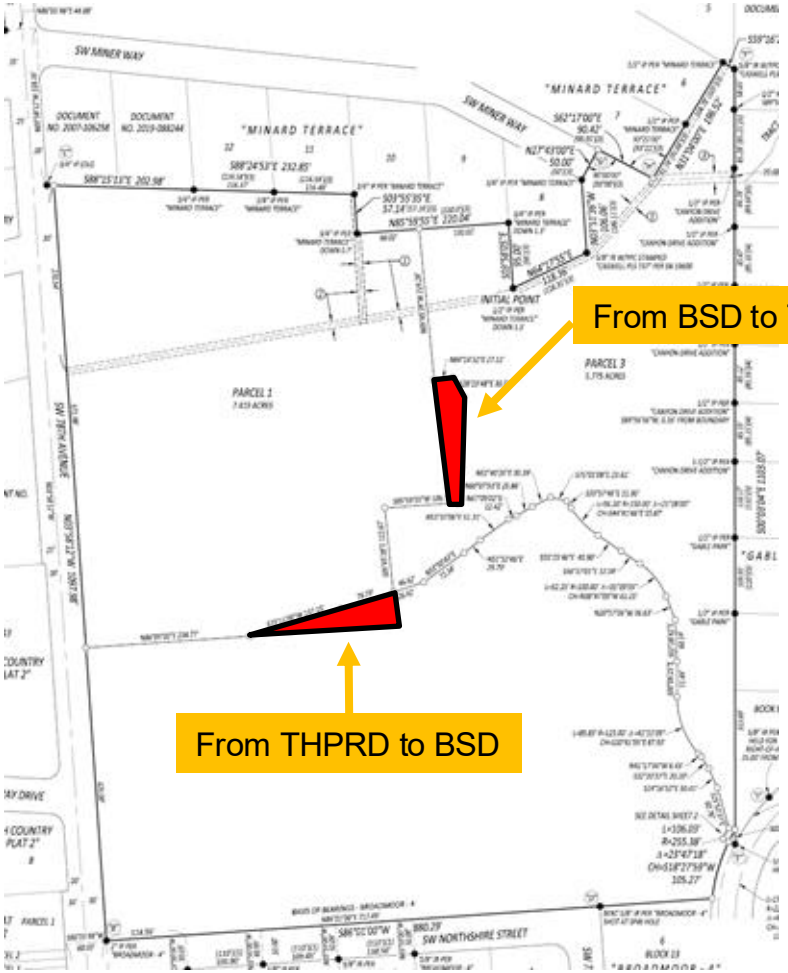
Areas of Encroachment





BEAVERTON SCHOOL DISTRICT

Proposed Surplus Area



BEAVERTON SCHOOL DISTRICT

Next Steps

- Board takes action on declaration of surplus property in October 2026.
- If approved, staff proceed with final lot line adjustment application with Washington County.
- Staff record new plat for Raleigh Park and Raleigh Park Elementary School properties.

Thank you!

Questions?

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BEAVERTON SCHOOL DISTRICT

ITEM FOR ACTION

APPROVE REVISIONS TO BOARD POLICIES CBA, CBG

SUMMARY
Revisions are recommended to update school board policies CBA and CBG. Changes were generated by the Oregon School Boards Association, which provides policy recommendations to reflect changes in state statutes and/or regulations and best practices, and integrated and recommended by staff.

POLICY DRAFT KEY

Blue Underlined	Recommended language additions or changes
~~Red Strikethrough~~	Removed outdated language
Black Italicized	Existing language moved within policy

BACKGROUND

CBA – Qualifications and Duties of the Superintendent
Revisions are recommended to update the structure of the introductory section to reflect updates in OSBA model policy, and to articulate the superintendent's delegation authority and responsibility, while maintaining the specific superintendent qualifications and duties established by this district.

CBG – Evaluation of the Superintendent
Revisions are recommended to align with OSBA model policy. The revisions clarify the superintendent evaluation process, establishment of criteria for evaluation, notice requirements, and topics allowable and nonallowable in executive session, consistent with the district's established practices.

RECOMMENDATION
It is recommended that the board approve the proposed revisions to board policies:

- Revisions to board policy CBA
- Revisions to board policy CBG

SUGGESTED MOTION
I move to approve the policy revisions as submitted.

Beaverton School District does not discriminate in any programs or activities 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.

BEAVERTON SCHOOL DISTRICT

Code: CBA
Adopted: 5/08/13
Readopted: 5/15/17
Orig. Code(s): CBA

Qualifications and Duties of the Superintendent

~~POSITION: Superintendent of Schools~~

~~QUALIFICATIONS:~~

The board requires the superintendent to be a strong educational leader who has the following professional experience and training:

1. A current ~~Oregon administrative~~ license that qualifies them to serve as superintendent of the district; ~~with an authorization for all levels, a superintendent's endorsement or a transitional superintendent license~~.
2. Successful experience as an educational leader and administrator.
3. Other qualifications as determined by the board.

In lieu of experience and training requirements above, the board may consider as a candidate for its superintendent's position an individual who meets ~~transitional or exceptional administrator~~ alternative licensure requirements. The board may take steps to assist an individual to qualify for such a license. ~~The board may, jointly with the individual, submit an application for such license for Teacher Standards and 5. Practices Commission (TSPC) approval pursuant to Oregon Administrative Rule (OAR) 584-080-0151 and 584-080-0161.~~

~~REPORTS TO: Board of Directors~~

~~SUPERVISES: Central office administrators and school principals; and through them, all district personnel.~~

~~JOB GOAL: Provide for effective administration of all schools and departments, and educational leadership throughout the school system and community.~~

Performance Responsibilities

The superintendent has the authority to formulate and delegate duties and responsibilities to subordinate administrative personnel. The delegation of such duties and responsibilities, however, will not relieve the superintendent of responsibility for the action taken under such delegation.

The superintendent:

1. Serves as chief executive officer of the district except as otherwise provided by law, makes rules not in conflict with law or with board policies, and decides all matters of administrative and supervisory detail in connection with the operation and maintenance of the schools;

2. Initiates and directs the development of policies for approval by the board, delegating such responsibility to associates and subordinates as deemed desirable;

3. Attends all meetings of the board and takes part in the deliberations, except those concerned with ~~his/her~~ their own contract status, but does not vote;

4. Assists the board in reaching sound judgments, establishing policies and approving those matters which the law requires the board to approve; places before the board necessary and helpful facts, comparisons, investigations, information and reports and makes available ~~the personal~~ advice on special or technical matters by those persons who are qualified to furnish it;

5. Implements and interprets board policies;

6. Recommends the appointment, renewal, nonrenewal, extension, nonextension, discharge and/or suspension of licensed employees of the district as provided by law, ~~and~~ board policies~~,~~ and the employee's collective bargaining agreement, as applicable, with such recommendations reported to the board;

7. Assigns or transfers licensed employees as provided by state law, board policies, collective bargaining agreements and meet and confer agreements, as applicable;

8. Appoints, assigns, transfers, promotes, demotes or discharges classified and nonrepresented employees as provided by state law, board policies, collective bargaining agreements and meet and confer agreements, as applicable;

9. Directs the professional supervisory staff in visits to the schools under ~~his/her~~ their charge; through this staff, directs, assigns and assists teachers and all other educational employees in the performance of their duties; classifies, assigns and controls the promotion of students; and performs such other duties as the board determines;

10. Directs the work of the professional staff in evaluating curriculum and instructional materials and, upon the basis of such study, makes recommendations to the board;

11. Supervises the establishment or modification of attendance and transportation area boundaries subject to board approval;

12. Directs the preparation of a budget showing the estimated receipts and disbursements necessary to cover the needs of the district for the ensuing budget period and submits this estimate to the board in accordance with law;

13. Approves and directs, in accordance with law and board regulations, purchases and expenditures, within the limits of the budget;

14. Exercises leadership in directing studies of sites and buildings, considering the population trend and the educational and cultural needs of the district, to ensure timely decisions by the board and electorate regarding construction and renovation projects;

15. Represents the district in dealings with other school systems, social institutions, business firms, government agencies and the general public;

16. Keeps the public informed about current educational practices, educational trends and the practices and problems in the district.

The superintendent will not engage in, or have financial interest in, any activity that raises a reasonable question of a conflict of interest.

The specific enumeration of the superintendent's duties as detailed above will not act to limit the broad authority and responsibility of the office.

END OF POLICY

Legal Reference(s):
ORS 332.075
ORS 342.143
ORS 342.173
~~ORS 342.175~~
ORS 342.850
~~OAR 581-023-0006 to -0041~~
~~OAR 581-023-0104~~
~~OAR 581-023-0112~~
~~OAR 581-023-0220 to -0240~~
~~OAR 584-020-0000 to -0045~~
OAR 584-036-0035(1)
OAR 584-046-0003 to -0024
OAR 584-080-0151
OAR 584-080-0152
OAR 584-080-0161

Cross Reference(s):
CBG - Evaluation of the Superintendent

BEAVERTON SCHOOL DISTRICT

Code: CBG
Adopted: 5/18/15
Readopted: 5/15/17
Orig. Code(s): CBG

Evaluation of the Superintendent

The board will formally evaluate the superintendent's job performance at least once each year. The evaluation will be based on ~~achievement measured against district performance standards and~~ the superintendent's job description, any applicable standards of performance, board policy and progress in attaining any goals for the year established by the superintendent and/or the board. ~~The evaluation process provides the public with transparent information about the superintendent's performance and serves as a constructive guide for the superintendent to continually improve his or her performance.~~

Additional criteria for the evaluation, if any, will be developed at a public board meeting prior to conducting the evaluation. The superintendent will be notified of the additional criteria prior to the evaluation.

~~The board chair shall solicit individual board member input in determining the attainment of the goals and measuring performance. Board members will gather feedback from district stakeholders to inform their evaluation. Results of the evaluation will be written, shared with the superintendent by the board chair and may be discussed~~ The board's discussion and conferences with and about the superintendent and their performance will be conducted in an executive session, unless the superintendent requests a session open to the public.[1] Such an executive session will not include a general evaluation of any district goal, objective or operation, or of any directive to personnel concerning district goals, objectives, operations or programs. Results of the evaluation will be written and placed in the superintendent's personnel file.

At the board's discretion, it may ~~Any time the superintendent's performance is deemed to be unsatisfactory, the board will~~ notify the superintendent in writing of specific areas to be remedied, and the superintendent may be given an opportunity to correct the problem(s). Where the board provided written notice pursuant to the prior sentence, if the board determines the superintendent's performance ~~continues to be~~ remains unsatisfactory, the board may dismiss or non-renew the superintendent pursuant to board policy, the superintendent's employment contract ~~with the superintendent~~, and state law and rules. In those situations where the superintendent's employment contract includes an evaluation, dismissal or non-renewal provision, it shall take precedence over this policy.

END OF POLICY

Legal Reference(s):

ORS 192.660~~(2), (8)~~
ORS 332.107

[1] Notice must be provided to the superintendent in accordance with OAR 199-0040-0030. The superintendent must receive written notice of the meeting no less than one business day or 24 hours, whichever is greater, in advance of the meeting.

ORS 332.505
~~ORS 342.513~~
~~ORS 342.815~~
OAR 581-022-2405
OAR 199-040-0027
OAR 199-040-0030

Hanson v. Culver Sch. Dist. (FDAB 1975).

Cross Reference(s):
BDC - Executive Sessions
CB - Superintendent
CBA - Qualifications and Duties of the Superintendent

ITEM FOR ACTION AT A FUTURE MEETING

AUTHORIZE PENSION OBLIGATION BONDS

SUMMARY
Oregon law allows public bodies, including school districts, to issue bonds to finance pension liabilities. It is proposed that the school board authorize the district to issue pension bonds if the market conditions support the district's financial objectives.

BACKGROUND
Oregon law allows public bodies, including school districts, to issue bonds to finance pension liabilities. Pension obligation bonds are a financing tool that allows an Oregon public employer to borrow money through bonds and deposit the proceeds into a PERS side account.

The intended purpose is to reduce a portion of the employer's unfunded PERS liability and, in turn, its required PERS employer contribution rates. The strategy is based on the expectation that long-term investment earnings within the pension system will exceed the interest cost of the bonds. If investment returns outperform borrowing costs, the employer can reduce future pension contribution costs and improve long-term budget stability. Recent financial projections do not include an assumption of new side accounts, only the expiration of current ones.

The district is currently exploring whether issuing new pension obligation bonds may be beneficial if market conditions are favorable. It is proposed that the school board authorize the district to issue pension bonds if the market conditions support the district's financial objectives, within the limitations established in the resolution. Authorization would not obligate the district to issue bonds; rather, it would provide flexibility to do so should market conditions support the district's financial objectives.

RECOMMENDATION
This is presented for initial consideration and will come before the board for approval at its next meeting.

Beaverton School District does not discriminate in any programs or activities 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.

RESOLUTION NO.

A RESOLUTION OF THE BOARD OF DIRECTORS OF BEAVERTON SCHOOL DISTRICT NO. 48J, WASHINGTON AND MULTNOMAH COUNTIES, OREGON, AUTHORIZING PARTICIPATION IN THE OREGON EDUCATION DISTRICTS PENSION BOND PROGRAM; AUTHORIZING A FULL FAITH AND CREDIT PENSION BOND AND RELATED FULL FAITH AND CREDIT PENSION OBLIGATIONS, TO BE ISSUED IN ONE OR MORE SERIES.

WHEREAS, the Board of Directors of Beaverton School District No. 48J, Washington and Multnomah Counties, Oregon, is authorized by Oregon Revised Statutes ("ORS") 238.692 to 238.698, including any amendments thereto (the "Act"), to issue revenue bonds under ORS Chapter 287A to finance its pension liability;

WHEREAS, the Act and ORS 287A.315 permit the District to pledge its full faith and credit and taxing power within the limitations of Sections 11 and 11b of Article XI of the Oregon Constitution to pay those bonds;

WHEREAS, school districts and education service districts have a pooled unfunded pension liability to the Oregon Public Employees Retirement System ("OPERS") and, based on the District's portion of the total school district and education service district payroll, the District's allocated portion of the unfunded pension liability (the "Pension Liability") is estimated to be $513,573,975 as of December 31, 2024;

WHEREAS, ORS 238.697 requires that the District (1) obtain a statistically based assessment from an independent economic or financial consulting firm regarding the likelihood that investment returns on bond proceeds will exceed the interest cost of the bonds under various market conditions and (2) make a report (the "Report") available to the general public that (a) describes the result of the assessment and (b) discloses whether the District has retained the services of an independent SEC-registered advisor;

WHEREAS the Report is attached hereto as Exhibit A and the District has obtained an assessment (the "Assessment"), dated June 11, 2026, from ECONorthwest, an independent economic consulting firm, which is attached to the Report;

WHEREAS, current interest rates in the bond market may be low enough to create the opportunity for the District to finance all or a portion of its unfunded pension liability and potentially reduce its costs;

WHEREAS, the Oregon Education Districts Full Faith and Credit Pension Bond Program (the "Program") is a structure whereby Oregon public school districts and education service districts electing to participate in the Program (the "Participating Districts") may simultaneously issue their full faith and credit pension bonds and, collectively, provide for the issuance, sale and delivery of Full Faith and Credit Pension Obligations, Series 2027A (the "Program Obligations") representing proportionate interests of the registered owners of the Program Obligations in the aggregate amount of full faith and credit pension bonds of the Participating Districts; and

WHEREAS, the Program provides that each Participating District will be responsible solely for its obligations under its pension bond and/or bonds, and not for the obligations of any other Participating District under any other pension bond and/or bonds, except to the extent assumed as a surviving district; now therefore,

THE BOARD OF DIRECTORS OF BEAVERTON SCHOOL DISTRICT NO. 48J, WASHINGTON AND MULTNOMAH COUNTIES, OREGON RESOLVES:

Section 1. Definitions.

Unless the context clearly requires otherwise, the following terms shall have the following meanings:

"Additional Charges" means the fees and other charges of the Program Trustee, as defined in the Program Trust Agreement and any indemnity payments due under Section 6(3) hereof.

"Bond" means the District's Full Faith and Credit Pension Bond, Series 2027A that is authorized by Section 2 of this Resolution.

"Bond Payment Date" means a date on which a Bond Payment is due.

"Bond Payments" means the principal and interest payments, including accreted interest under any deferred interest bond, due under the Bond, and any prepayment premium which is due if Bond principal is prepaid.

"Business Day" means any day other than a Saturday, Sunday or a day on which the Trustee is authorized by law to remain closed.

"District" means Beaverton School District No. 48J, Washington and Multnomah Counties, Oregon, or its successors.

"Event of Default" refers to an Event of Default listed in Section 9(1) of this Resolution.

"Government Obligations" means direct noncallable obligations of the United States of America or noncallable obligations the principal of and interest on which are unconditionally guaranteed by the United States of America.

"Intercept Agreement" means the Intercept Agreement dated as of October 31, 2002, as amended and supplemented.

"Intercept Payment" means the amount paid by the State to the Program Trustee on behalf of the District under the Intercept Agreement.

"Participants" or "Participating Districts" means school districts and education service districts that participate in the Program.

"Program Obligations" means the Full Faith and Credit Pension Obligations issued by the Program Trustee under the Program Trust Agreement which represent proportionate and undivided interest into right to receive Bond Payments and similar pension bond payments made by the other Participants in the Program.

"Program Trust Agreement" means a trust agreement between the Program Trustee and the Participants, in which the Program Trustee agrees to hold the Bond and distribute the Bond Payments to the owners of Program Obligations.

"Program Trustee" means U.S. Bank Trust Company, National Association, as trustee under the Program Trust Agreement, or its successors.

"Qualified Consultant" means an independent certified public accountant, an independent municipal advisor, and having experience and expertise in the analysis of defeasance escrows, who is selected by the District.

"Resolution" means this Resolution, including any amendments made in accordance with Section 7 of this Resolution.

"School District Official" means the Superintendent or Chief Financial Officer of the School District or the Superintendent's designee.

"Security Payments" means the payments, if any, the District is required to make under the Program Trust Agreement that are equal to the amount invoiced by the Program Trustee in order to meet the District's Bond payments, less payments received by the Program Trustee pursuant to the Intercept Agreement, plus any prepayments received by the Program Trustee pursuant to the Program Trust Agreement.

"Special Counsel" means Hawkins Delafield & Wood LLP, Portland, Oregon

"State" means the State of Oregon, or any agency thereof.

"State Education Revenues" means any state funding for school districts and education service districts legally available to pay debt service on the pension bonds. Currently, such funds are appropriated each biennium and designated as the "State School Fund".

"Underwriter" means Piper Sandler & Co., Portland, Oregon and any co-managers to be determined at their discretion.

Section 2. Bond Authorized.

(1) The District hereby authorizes the issuance, sale and delivery of its Bond, in accordance with this Resolution and in an amount which does not exceed the amount necessary to produce net proceeds equal to the District's Pension Liability as reported by the OPERS's actuary as of the expected date of the lump sum payment, plus the costs of issuing and selling the Bond and the District's allocated share of the costs of issuing and selling the Program Obligations.

(2) Bond proceeds shall be used to pay all or a portion of the District's Pension Liability to OPERS and to pay costs of issuing and selling the Bond and the District's allocated share of the costs of issuing and selling the Program Obligations. The District may direct that a portion of the Bond proceeds be directly paid to OPERS after closing and a portion be retained by the Program Trustee for payment to OPERS over time as directed by the School District Official. The issuance of the Bond and participation in the Program shall not obligate the District to pay any portion of another school district's liability.

(3) The Bond shall be a "federally taxable bond" which bears interest that is not excludable from gross income under Section 103(a) of the Internal Revenue Code of 1986, as amended. Interest will, however, be exempt from Oregon personal income taxation.

(4) OPERS currently charges the District a rate of 6.90 percent per annum on its unfunded liability because that is the assumed rate of return that OPERS expects, over the long term, to earn on its investments. Issuing Bonds at a lower rate of interest and depositing proceeds at OPERS in a Side Account ("Side Account") may reduce costs for the District if the rate of return on the Bond proceeds deposited in the Side Account exceeds the borrowing costs. To maximize the potential for the rate of return on the OPERS fund to exceed the rate of interest on the Bond, the Bond shall not be sold at a true interest cost of more than 5.00% per annum.

(5) The School District Official shall compare the cash flows required to pay the Bond to the payroll rate credit currently estimated from the Side Account and determine a Bond structure which the School District Official estimates will be advantageous to the District.

(6) The School District Official is authorized to execute a letter to be sent to OPERS requesting the necessary payoff figures and to pay any fees required in connection therewith or, if such letter has been executed prior hereto, the Board hereby ratifies such action.

Section 3. Delegation.

The School District Official may, on behalf of the District, and without further action by the Board:

(1) Participate in the preparation of, authorize the distribution of, and deem final any official statement or other disclosure documents relating to the Bond or the Program Obligations.

(2) Establish the final principal amount, Bond Payment schedule, interest rates, sale price and discount, prepayment terms, payment terms and dates, and other terms of the Bond.

(3) Negotiate the terms of, and enter into a bond purchase agreement which provides for the acquisition of the Bond by the Program Trustee and, if required, execute a letter of intent prior to the sale.

(4) Execute and deliver the Program Trust Agreement, which authorizes the Program Trustee to issue the Program Obligations, and any other agreements or documents which may be required for participation in the pension bond program.

(5) Execute and deliver the Bond to the Program Trustee, provided the Bond shall also be executed with the facsimile signature of the Chair of the Board of Directors of the District.

(6) Undertake to provide continuing disclosure for the Bond and the Program Obligations in accordance with Rule 15c2-12 of the United States Securities and Exchange Commission.

(7) Apply for ratings on the Bond or the Program Obligations and purchase municipal bond insurance or obtain other forms of credit enhancements for the Bond or the Program Obligations, enter into agreements with the providers of credit enhancement, and execute and deliver related documents.

(8) Execute and deliver the Intercept Agreement and any related documents, including a certificate demonstrating that the State Education Revenues distributed to the District in each of the three most recently completed fiscal years are not less than two (2.0) times the average annual debt service on the Bond and any other outstanding pension bonds issued under the Intercept Agreement.

(9) Execute and deliver any agreements or certificates and take any other action in connection with the Bond, the Program Obligations, the Intercept Agreement and OPERS administrative rules which the School District Official finds is desirable to permit the sale and issuance of the Bond and the Program Obligations in accordance with this Resolution.

Section 4. Security for Bond.

(1) The District shall pay the amounts due under the Bond from any and all of its legally available taxes, revenues and other funds as authorized by the Act. The District hereby pledges its full faith and credit and taxing power within the limitations of Sections 11 and 11b of Article XI of the Oregon Constitution to pay the amounts due under the Bond pursuant to ORS 287A.315.

(2) To provide additional security for the Bond, the District agrees to enter into the Intercept Agreement.

(3) In the event funds under the Intercept Agreement are insufficient or unavailable or the Intercept Agreement is not in full force and effect for any reason, the District shall make Security Payments to the Program Trustee in accordance with the terms of the Program Trust Agreement.

(4) This Resolution shall constitute a contract with the Program Trustee, and the owners of the Program Obligations shall be third-party beneficiaries of that contract.

Section 5. Prepayment.

The principal component of Bond Payments shall be subject to prepayment on the dates and at the prices established by the School District Official pursuant to Section 3(2) and in accordance with the Program Trust Agreement.

Section 6. Covenants.

The District hereby covenants and agrees with the Program Trustee for the benefit of the owners of the Program Obligations as follows:

(1) The District shall promptly cause Security Payments and the principal, premium, if any, and interest on the Bond to be paid as they become due in accordance with the provisions of this Resolution and the Bond.

(2) The District covenants for the benefit of the Program Trustee to pay the Additional Charges reasonably allocated to it by the Program Trustee, in accordance with the invoices for such Additional Charges which are provided by the Program Trustee.

(3) To the extent permitted by law, the District covenants and agrees to indemnify and save the Program Trustee harmless against any loss, expense or liability which is reasonably allocable to the District and which the Program Trustee may incur arising out of or in the exercise or performance of its duties and powers under the Program Trust Agreement relating to the Bond, including the costs and expenses of defending against any claim or liability, or enforcing any of the rights or remedies granted to it under the terms of the Program Trust Agreement in connection with the Bond, excluding any losses or expenses which are due to the Trustee's breach of fiduciary duties, negligence or willful misconduct. The obligations of the District under this Section 6(3) shall survive the resignation or removal of the Program Trustee under the Program Trust Agreement and the payment of the Program Obligations and discharge under the Program Trust Agreement. The damages claimed against the District shall not exceed the damages which may be allowed under the Oregon Tort Claims Act, Oregon Revised Statutes Section 30.260, et seq., unless the provisions and limitations of such act are preempted by federal law, including, but not limited to the federal securities laws.

(4) The District covenants not to merge, consolidate or dissolve unless the District's Bond has been defeased or the obligation for payment of the Bond has been assumed by the successor entity.

Section 7. Amendment of Resolution.

The District may amend this Resolution only with the consent of the Program Trustee.

Section 8. State Intercept Agreement.

The School District Official is hereby authorized to negotiate and enter into the Intercept Agreement with the State whereby appropriations from the State that would otherwise be paid to the District are diverted to the Program Trustee for the purpose of payment of debt service on the Bond. Any such agreement with the State does not relieve the District of its liability to make payments on the Bond.

Section 9. Default and Remedies.

(1) The occurrence of one or more of the following shall constitute an Event of Default under this Resolution:

(A) Failure by the District to pay Bond principal, interest or premium when due (whether at maturity, or upon prepayment after principal components of Bond Payments have been properly called for prepayment);

(B) Except as provided in Section 9(1)(A) above, failure by the District to observe and perform any other covenant, condition or agreement which this Resolution requires the District to observe or perform for the benefit of Program Trustee, which failure continues for a period of 60 days after written notice to the District by the Program Trustee specifying such failure and requesting that it be remedied; provided however, that if the failure stated in the notice cannot be corrected within such 60 day period, it shall not constitute an Event of Default so long as corrective action is instituted by the District within the 60 day period and diligently pursued, and the default is corrected as promptly as practicable after the written notice referred to in this Section 9(1)(B); or,

(C) The District is adjudged insolvent by a court of competent jurisdiction, admits in writing its inability to pay its debts generally as they become due, files a petition in bankruptcy, or consents to the appointment of a receiver for the installment payments.

(2) The District's failure to make Bond Payments or Security Payments constitutes an Event of Default as set forth above independently of whether or not the State complies with the provisions of the Intercept Agreement.

(3) The Program Trustee may waive any Event of Default and its consequences, except an Event of Default described in Section 9(1)(A).

(4) If an Event of Default occurs and is continuing the Program Trustee may exercise any remedy available at law or in equity; however, the Bond Payments shall not be subject to acceleration, and the District shall be responsible solely for its Bond Payments and any Additional Charges reasonably allocated to it.

(5) No remedy in this Resolution conferred upon or reserved to the Program Trustee is intended to be exclusive and every such remedy shall be cumulative and shall be in addition to every other remedy given under this Resolution or now or hereafter existing at law or in equity, including allowing the State to withhold future payments. No delay or omission to exercise any right or power accruing upon any default shall be construed to be a waiver thereof, but any such right and power may be exercised from time to time and as often as may be deemed expedient. To entitle the Program Trustee to exercise any remedy reserved to it, it shall not be necessary to give any notice other than such notice as may be required by this Resolution or by law.

Section 10. Defeasance.

(1) The District may defease all or any portion of the Bond Payments in accordance with this Section 10. The District shall be obligated to pay any Bond Payments that are defeased in accordance with this Section 10 solely from the money and Government Obligations which are deposited in escrow pursuant to this Section 10, unless the amounts available in escrow are

insufficient to make the Bond Payments. Bond Payments shall be deemed defeased if the District:

(A) irrevocably deposits money or noncallable Government Obligations in escrow:

(i) with an independent trustee or escrow agent which mature and pay interest in amounts which are calculated to be sufficient, without reinvestment, to make all the Security Payments associated with the Bond Payments which are to be defeased on their maturity dates, and to make any prepayments of Bond Payments described in Section 5 on the dates those prepayments are required to be made if any principal components of defeased Bond Payments are to be prepaid; or

(ii) with the Program Trustee, which mature and pay interest in amounts which are calculated to be sufficient, without reinvestment, to make when due all the Bond Payments which are to be defeased on their maturity or prepayment dates; and,

(B) provides irrevocable notice of any prepayments which are to occur in connection with the defeasance to the Program Trustee at least 50 days prior to the prepayment; and,

(C) files with the escrow agent or trustee an opinion from a Qualified Consultant to the effect that the money and the principal and interest to be received from the Government Obligations are calculated to be sufficient, without further reinvestment, to pay the Security Payments and prepayments of Bond Payments described in Section 10(1)(A).

(2) The District shall notify the Program Trustee promptly of any defeasance of Bond Payments.

Section 11. Rules of Construction.

In determining the meaning of provisions of this Resolution, the following rules shall apply unless the context clearly requires application of a different meaning:

(1) References to section numbers shall be construed as references to sections of this Resolution.

(2) References to one gender shall include all genders.

(3) References to the singular shall include the plural, and references to the plural shall include the singular.

Section 12. Effective Date.

This resolution shall take effect on the date of its passage by the District.

ADOPTED by the Board of Directors of Beaverton School District No. 48J, located in Washington and Multnomah Counties, Oregon this 10th day of November, 2026.

BEAVERTON SCHOOL DISTRICT NO. 48J
WASHINGTON AND MULTNOMAH
COUNTIES, OREGON

By: _____
Chair

ATTEST:

By: _____
Superintendent

Exhibit A

Report on Pension Bonds

Prior to the issuance of pension obligation bonds, the Beaverton School District No. 48J (the "District") has obtained a statistically based assessment from ECONorthwest entitled "Issuance of Pension Obligation Bonds – A Risk/Reward Analysis" dated as of June 11, 2026 (the "Assessment") pursuant to ORS 238.697(1)(a).

The District has prepared this report pursuant to ORS 238.697(1)(b) (the "Report").

In connection with the issuance of pension obligation bonds, the District has retained the services of Special Districts Association of Oregon Advisory Services LLC, an independent municipal advisor registered with the Securities and Exchange Commission.

The Assessment is attached to this Report as Exhibit 1. Results of the Assessment are as follows:

ECOnorthwest

DATE:	June 11, 2026
FROM:	ECOnorthwest
SUBJECT:	Pension Obligation Bond Analysis Executive Summary

Introduction

ECOnorthwest recently conducted an analysis to evaluate the risks and rewards of issuance of Pension Obligation Bonds (POBs) by public employers that are part of the Oregon Public Employee Retirement System (OPERS).[1] For this analysis, we assumed that officials of governmental entities receiving our report are in a position to finance such bonds. Proceeds from the POBs would be added to, or used to create, side account balances to be managed in the same way as other PERS assets, by the Investment Division of the Oregon Treasury under the guidance of the Oregon Investment Council (OIC). This executive summary outlines the motivation for issuing POBs, our analytic methodology, and findings from our analysis. Additional details about the analysis are presented in our main report.

Background

Like many other states, Oregon's PERS has seen a growing gap between the cost of PERS benefits promised to participating public employees and the funding available for those benefits, resulting in an unfunded actuarial liability (UAL). Resolving the UAL will require increasing contributions from participating public employers over a long period of time. Pension obligation bonds, if issued in an economical manner and invested in a higher yielding portfolio, can potentially improve the ability of employers to pay their share of PERS obligations to the OPERS fund. Whether or not issuance of POBs makes sense in this setting will depend upon the likely evolution of side account returns relative to true interest cost (TIC) of the POBs.

Employers may benefit if the TIC of a bond issue is low relative to the potential return opportunities of a PERS side account over the same future period as the bond issues. However, this outcome is by no means assured. The true interest cost of carrying the POB debt would be known, but the employer also must consider the risks associated with the fact that the future rate of returns to side account deposits are not known with certainty. This

[1] The analysis provided in this document was developed by ECONorthwest for informational purposes only. All possible professional care was taken to prepare a realistic emulation of the likely POB side account behavior, and the OPERS procedures for accommodating POBs. State of the art modeling and statistical software was employed in this exercise. It should be recognized, however, that there are practical limits to the precision with which market and agency behavior can be modeled. The generic nature of the modeling performed may or may not be relevant to the circumstances of any one public employer. Additionally, nothing herein should be construed as offering investment advice or fairness opinions for the purpose of issuing securities. For this, interested parties should seek out professional counsel.

uncertainty may have consequences for future expenses of the PERS system and revenues needed to pay the POB debt.

Portfolio allocation and other decisions made by the OIC influence the performance of the OPERS assets, as can the timing of the issuance of POBs. The primary determinants of the risk to POB issuers are (1) uncertainty in the performance of the asset classes that comprise the side account, (2) asset allocation choices made by the trustees of that account, and (3) the interactions of these factors with the POB strategy of the public employer(s).

To quantify these risks, our analysis models side account performance over time under various market conditions and bond issuance scenarios. The results quantify the potential risks and rewards of POBs under the assumed conditions.

Methodology

The model simulates side account performance using portfolio allocation targets obtained from OIC documents, and on forecasts of anticipated asset returns, based on reports from Oregon Treasury Investment Division staff, their consultants, and OPERS actuaries. We combine this information with assumptions about side account management. Specifically, we assume:

1. Side account balances are amortized at a constant share of payroll over the remaining life of the side account (assumed to expire on 12/31/2046, during fiscal year 2047).
2. Funds equal to the relevant percent of payroll are removed from the account as employer rate relief.
3. Earnings on side account deposits are credited annually.

To characterize the distribution of potential benefits to employers of POB issuance, we conduct 10,000 simulations of side account performance over the life of the account for each of four assumed POB TICs, three of which amortize over 20 years (4.25 percent, 4.75 percent, and 5.25 percent) and one which amortizes over 15 years (4.50%). Each simulation represents a different, potential future path of account returns over time. For each simulation, we compare the benefits provided to employers in the form of rate relief to the cost of bond repayment. In doing so, we quantify two important measures of risk and reward:

- **The net present value (NPV) of POB issuance.** This measure identifies the current value to employers of future benefits of POB issuance (the extent to which rate relief obtained exceeds bond repayments).

- **The probability that NPV is greater than zero.** This measure of risk identifies the likelihood, given the assumptions in the model, that the current value of POB issuance would prove beneficial to the employer (if NPV falls below zero, POB issuance is more costly to the employer than not issuing bonds).

Summary of findings

The findings presented below refer to an initial side account deposit of $1 million. The results can be scaled to approximate the potential risks and rewards of larger or smaller deposits. For example, a $2 million deposit would generate a benefit or loss of two times the dollar amounts shown in the charts and tables below. The probability that the NPV is greater than zero depends on the TIC, not on the size of the initial deposit.

Our analysis assumes a maturity date for the bonds in fiscal year 2047. **The projected annualized geometric mean return over the term of the bonds is 7.3 percent**,[2] with a 5th percentile annualized return of 4.3 percent and a 95th percentile annualized return of 10.6 percent.

Figure 1 shows the probability that the net present value of POB issuance is greater than zero. As the chart demonstrates, this probability declines as the TIC increases for a given amortization period (e.g., 20 years). Figure 2 illustrates the range (5th percentile, median, and 95th percentile) of net present values obtained from the simulations for each TIC. This distribution shifts downward as TIC increases, for a given amortization period.

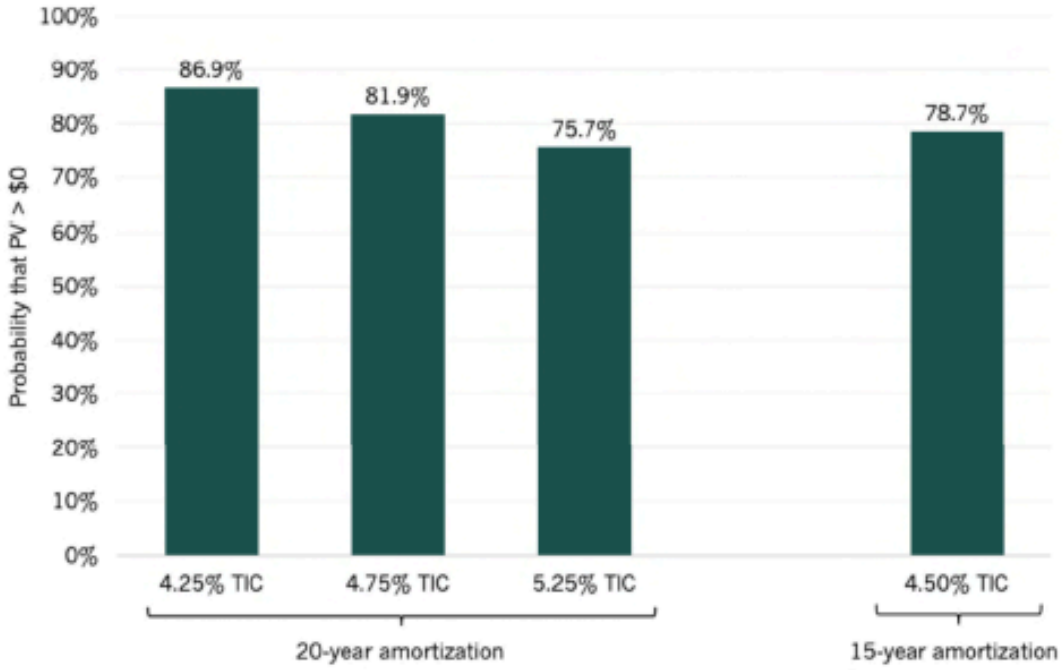
The 5th percentile net present value falls below zero at every TIC, rising as a share of the initial deposit as the TIC increases for a given amortization period. For example, with a TIC of 4.25 percent, the 5th percentile net present value is 9.7 percent of the initial deposit, rising to 17.4 percent at a TIC of 5.25. These values, in combination with the probabilities described above, quantify some of the financial risks of POB issuance.

Figure 3 provides additional detail about the distribution of outcomes. As illustrated in earlier figures, outcomes at every point in the distribution are more positive at lower TICs for a given amortization period. Net present values are also somewhat more volatile at lower TICs, as evidenced by the higher standard deviation of the calculated net present value.

[2] The geometric mean return is a required statistic that borrowers will need to supply annually to the State Treasurer under ORS 238.697.

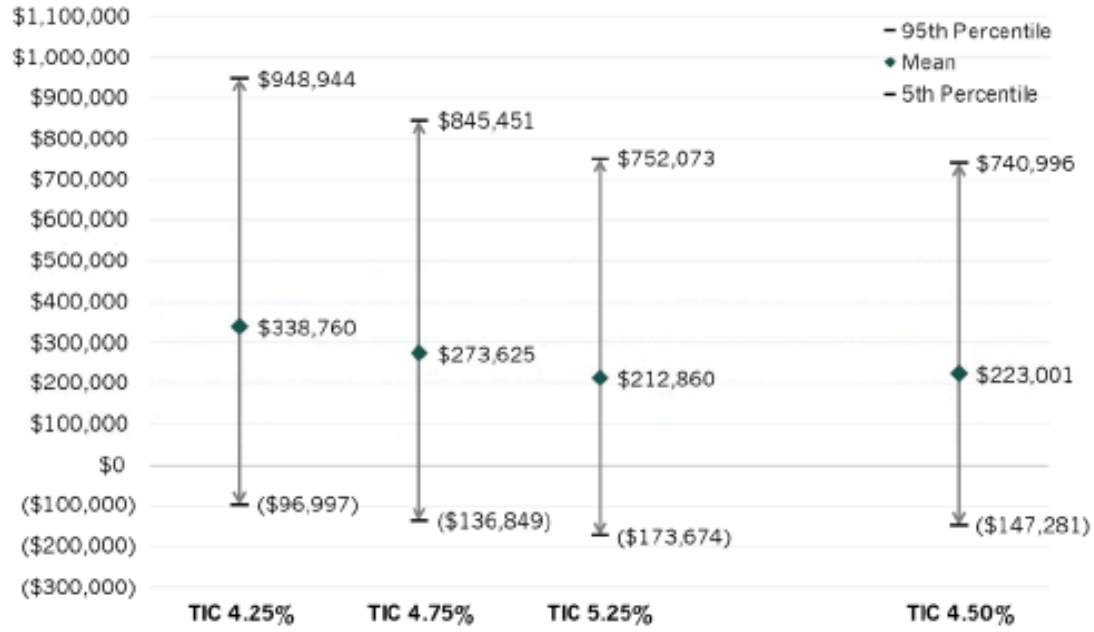


Figure 1: Probability that the net present value of POB issuance is greater than zero, various TICs



Source: ECOnorthwest.

Figure 2: 5th percentile, mean, and 95th percentile net present value, various TICs



Source: ECOnorthwest.

Figure 3: Distribution of net present value and probability of a positive net present value, various TICs

No. of Tranches	1	1	1	1
Rate (TIC)	4.25%	4.75%	5.25%	4.50%
Amortization	20-year	20-year	20-year	15-year
Mean	$338,760	$273,625	$212,860	$223,001
Standard Deviation	$331,749	$311,615	$292,967	$277,432
Maximum	$2,852,079	$2,624,188	$2,412,621	$2,313,506
Minimum	-$360,859	-$385,237	-$408,140	-$350,110
95th percentile	$948,944	$845,451	$752,073	$740,996
90th percentile	$772,437	$681,309	$597,553	$588,324
75th percentile	$513,522	$439,198	$369,087	$374,365
50th percentile	$286,353	$224,666	$166,977	$180,804
25th percentile	$102,273	$51,484	$5,132	$26,369
10th percentile	-$29,659	-$73,001	-$113,778	-$88,167
5th percentile (VaR)	-$96,997	-$136,849	-$173,674	-$147,281
Zero Bound percentile	86.9%	81.9%	75.7%	78.7%

Source: ECONorthwest.

For the modeled scenarios, the expected value to employers of a POB strategy is positive in net present value terms, with the expect value being a non-trivial proportion of POB funding under the scenarios modeled in this summary. However, there is also a non-trivial probability that the net present value of POBs is zero or less. This probability increases as the TIC increases.

In determining whether to pursue a POB issue, employers should also assess the potential effect of several additional considerations on the anticipated benefits:

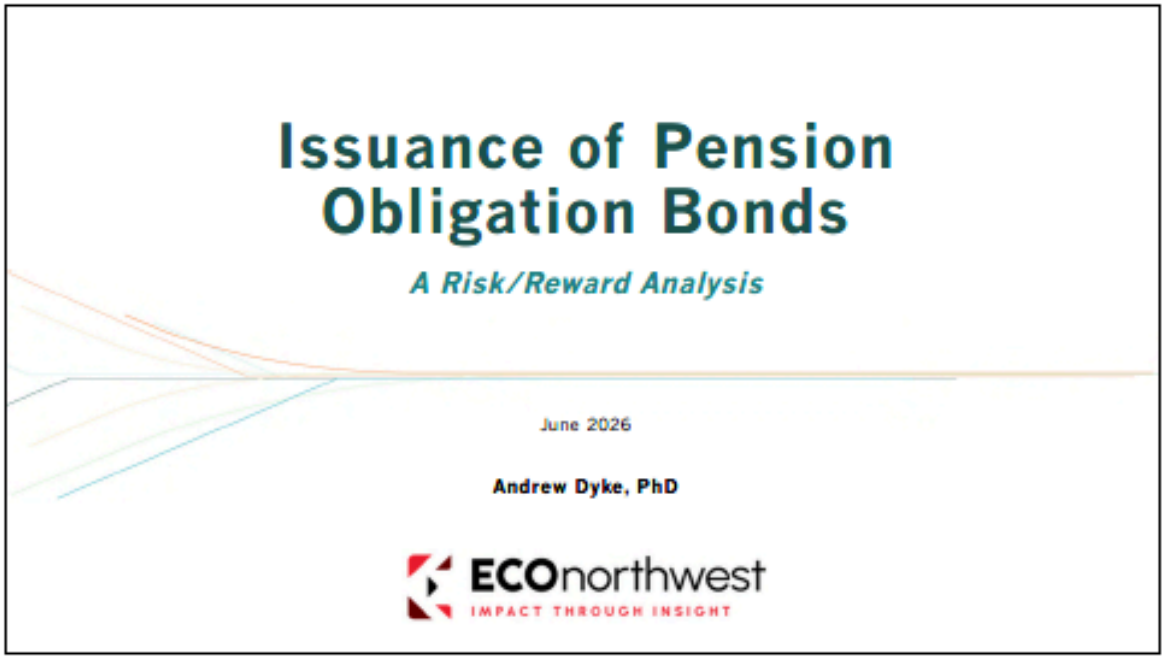
- Actual issuance TIC may differ from those in the scenarios
- The TIC does not capture some issuance costs
- The employer's payroll growth rate may differ significantly from that assumed by the PERS actuary[3]

[3] As of June 2026, the assumed payroll growth rate was 3.4 percent. This assumption was retrieved from the Oregon PERS Board Meeting held on May 20, 2025, which can be accessed here: *https://www.oregon.gov/pers/Documents/Board-Meetings/2025/05-30-2025-PERS-Board-Meeting-Packet.pdf.*



Exhibit 1 to the Report

Assessment



1



2

Presentation Outline

- Introduction and purpose of this analysis
- Modeling Approach
  - Monte Carlo Methodology
  - Asset Return and Allocation Assumptions
  - Alternative Scenarios Modeled
- Model Findings
  - Side account performance and the potential benefits of POBs to employers
- Implications
- Acknowledgements, Caveats, and Disclaimers

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Basics of POBs

- POBs are bonds issued by state or local governments to fund public employee pension obligations
  - First issued by City of Oakland in 1986 to arbitrage between tax-exempt borrowing rates and higher market investment yields of pension assets.
  - The public employer benefits if the returns on investments of bond funds are greater than the costs of borrowing.
- The Tax Reform Act of 1986 eliminated tax exemption for POBs
  - Higher yields of diversified portfolios relative to borrowing costs revived POB arbitrage opportunities in 1990s.
- Still seen as a potential way to lower cost of pension funding
  - Use is heaviest by high-UAL plans, including Oregon.

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Purpose of this analysis

- POBs are bonds issued by state or local governments to fund public employee pension obligations to arbitrage between borrowing rates and the presumed higher market investment yields of pension assets
- This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. **Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.**
- The potential advantages of POBs to public employers depend upon the relative performance of the investment vehicle ("side account") and POB issuance costs
  - Issuance of POBs may reduce employer costs of pension funding
  - However, high side account yields are not achieved without risk
- Key measures of POB performance
  - The mean expected net present value (NPV) of side account returns relative to POB total interest costs
  - The risk profile of the NPV given uncertainty about side account returns

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Approach

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Approach

- Quantifying advantages to issuers is complex
  - The future path of asset yields is not known precisely
  - Side account management and actuarial treatment of POB contributions must be emulated
- ECOnorthwest uses Monte Carlo techniques to simulate uncertainty in side account performance
  - Individual asset class returns are stochastic
  - Rebalancing behaviors are linked to asset returns paths
- ECOnorthwest POB model also emulates POB and Plan features
  - Alternative True Interest Cost (TIC) of the POB issue
  - Actuarial treatment of POB contributions

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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The Model

- Scenarios:
  - Three issuance cost (TIC) assumptions with a 20-year amortization: 4.25%, 4.75%, and 5.25%
  - One issuance cost assumption with a 15-year amortization: 4.50%
- Our analysis uses the portfolio target and assumed asset returns characteristics current as of April 2026.
- Initial portfolio allocation based on OPERF assets as of 04/30/2026.
- All analyses assume a $1M total POB contribution to facilitate scaling.
- Net present value calculations include calculated earnings through December 2046 (assumed end of the side account) and bond costs through June 2047.

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Asset Return and Allocation Assumptions

Asset Class	Future Returns and Volatility		Portfolio Allocation		
	Mean	Std. Dev.	Range	Target	Current *
Public Equity	6.9%	17.1%	22.5 - 32.5%	27.5%	24.4%
Real Assets	8.0%	14.0%	2.5 - 10.0%	7.5%	10.3%
Diversifying Strategies	5.7%	6.0%	2.5 - 10.0%	7.5%	5.4%
Fixed Income	4.4%	4.7%	20.0 - 30.0%	25.0%	18.7%
Private Equity	9.6%	22.0%	15.0 - 27.5%	20.0%	24.1%
Real Estate	6.7%	14.0%	7.5 - 17.5%	12.5%	13.1%
Credit	6.7%	9.5%	--	--	4.0%

Source: ECOnorthwest from OIC data.

Note: (*) Current allocation as of 04/30/2026.

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Asset Return and Allocation Assumptions

Asset Class Returns Correlation over Time

Asset Class	Public Equity	Fixed Income	Private Equity	Real Estate	Real Assets	Diversifying Strategies	Credit
Public Equity	**1.00**	0.27	0.91	0.53	0.69	0.12	0.77
Fixed Income	0.27	**1.00**	0.00	0.26	0.26	0.17	0.17
Private Equity	0.91	0.00	**1.00**	0.47	0.54	0.09	0.71
Real Estate	0.53	0.26	0.47	**1.00**	0.64	0.03	0.52
Real Assets	0.69	0.26	0.54	0.64	**1.00**	0.04	0.61
Diversifying Strategies	0.12	0.17	0.09	0.03	0.04	**1.00**	0.13
Credit	0.77	0.17	0.71	0.52	0.61	0.13	**1.00**

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Asset Return and Allocation Assumptions

Asset Class	Expected Annual Return (Current Market Assumptions as of...)			Difference (percentage points)	
	October 2021	May 2025	April 2026	2026 vs. 2021	2026 vs. 2025
Public Equity	6.5%	6.8%	6.9%	0.4	0.1
Real Assets	7.5%	7.9%	8.0%	0.5	0.1
Diversifying Strategies	4.4%	5.6%	5.7%	1.3	0.1
Fixed Income	1.7%	5.1%	4.4%	2.7	-0.7
Private Equity	8.5%	9.5%	9.6%	1.1	0.1
Real Estate	6.2%	6.5%	6.7%	0.5	0.2
Risk Parity	5.2%	NA	NA	NA	NA
Opportunity Portfolio	--	NA	NA	NA	NA
Credit	NA	NA	6.7%	NA	NA

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Account Amortization

- Side account balances are influenced by amortization procedures
  - Balances amortized as a constant percent of payroll over remaining life of the side account (the account is assumed to end on 12/31/2046)
  - Each year, the percent of payroll that is determined by the amortization is taken out of the modeled side account balance for employer rate relief
  - Assumed earnings rate of 6.9% and 3.4% payroll growth rate are used in amortization
- Current plan procedures are incorporated:
  - Credited earnings and deducted transfers to the Employer Reserve for rate relief are accommodated
- Earnings are credited annually at the simulated portfolio rate of return
  - Applied to the beginning balance for the year minus one half of the amount taken out for rate relief

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Model Results

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Mean Annual Side Account Returns

- The forecast extends to fiscal year 2047, the last year the side account exists
  - **Trend in mean annual return:** Stays constant at 6.8% in 2027, varying slightly through the end of the forecast horizon
  - **Trend in 95th percentile return:** Increases from 29.0% in 2027 to 29.6% as of the forecast horizon
  - **Trend in 5th percentile return:** Increases from -10.1% in 2027 to -9.9% as of the forecast horizon
- Trends are similar to recent forecasts by consultants to OIC/OST and OPERS

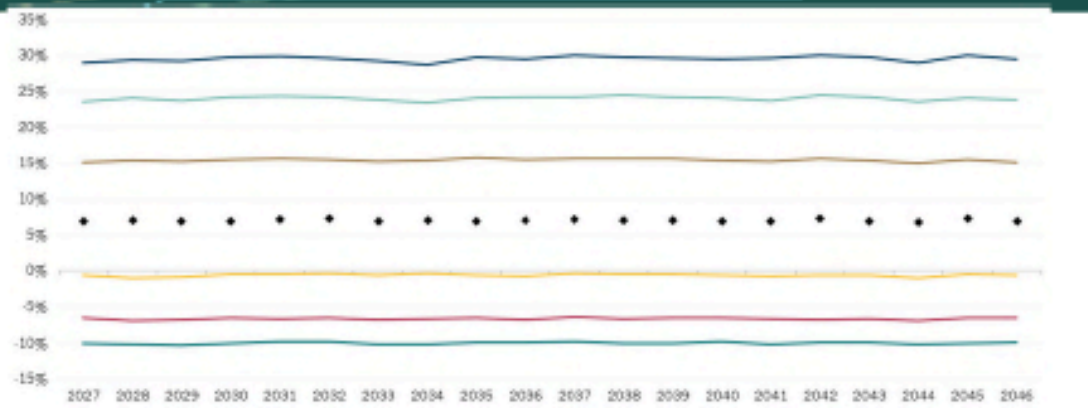
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Mean Annual Side Account Returns



Percentile	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
95th	29.9%	29.4%	29.3%	29.8%	29.9%	29.7%	29.2%	28.7%	29.7%	29.6%	30.1%	29.7%	29.6%	29.5%	29.6%	30.0%	29.7%	29.8%	30.1%	29.6%
80th	23.6%	24.1%	23.7%	24.2%	24.3%	24.2%	23.9%	23.5%	24.1%	24.2%	24.2%	24.5%	24.1%	24.0%	23.7%	24.5%	24.3%	23.6%	24.1%	23.8%
75th	15.2%	15.4%	15.3%	15.5%	15.7%	15.6%	15.3%	15.4%	15.7%	15.6%	15.6%	15.7%	15.7%	15.4%	15.3%	15.7%	15.4%	15.0%	15.5%	15.1%
50th	6.8%	7.0%	6.8%	6.9%	7.1%	7.2%	6.8%	7.0%	6.9%	7.0%	7.1%	7.0%	7.0%	6.8%	6.8%	7.2%	6.8%	6.7%	7.1%	6.8%
25th	-0.6%	-1.3%	-0.8%	-0.5%	-0.5%	-0.4%	-0.7%	-0.4%	-0.6%	-0.8%	-0.3%	-0.5%	-0.5%	-0.6%	-0.8%	-0.6%	-0.6%	-1.0%	-0.5%	-0.4%
10th	-6.6%	-6.9%	-6.8%	-6.5%	-6.7%	-6.5%	-6.8%	-6.8%	-6.5%	-6.8%	-6.5%	-6.7%	-6.6%	-6.6%	-6.8%	-6.8%	-6.7%	-7.0%	-6.6%	-6.6%
5th	-10.1%	-10.2%	-10.3%	-10.1%	-9.8%	-9.8%	-10.1%	-10.2%	-10.0%	-9.9%	-9.7%	-10.0%	-10.0%	-9.8%	-10.2%	-9.9%	-10.3%	-10.2%	-10.0%	-9.9%

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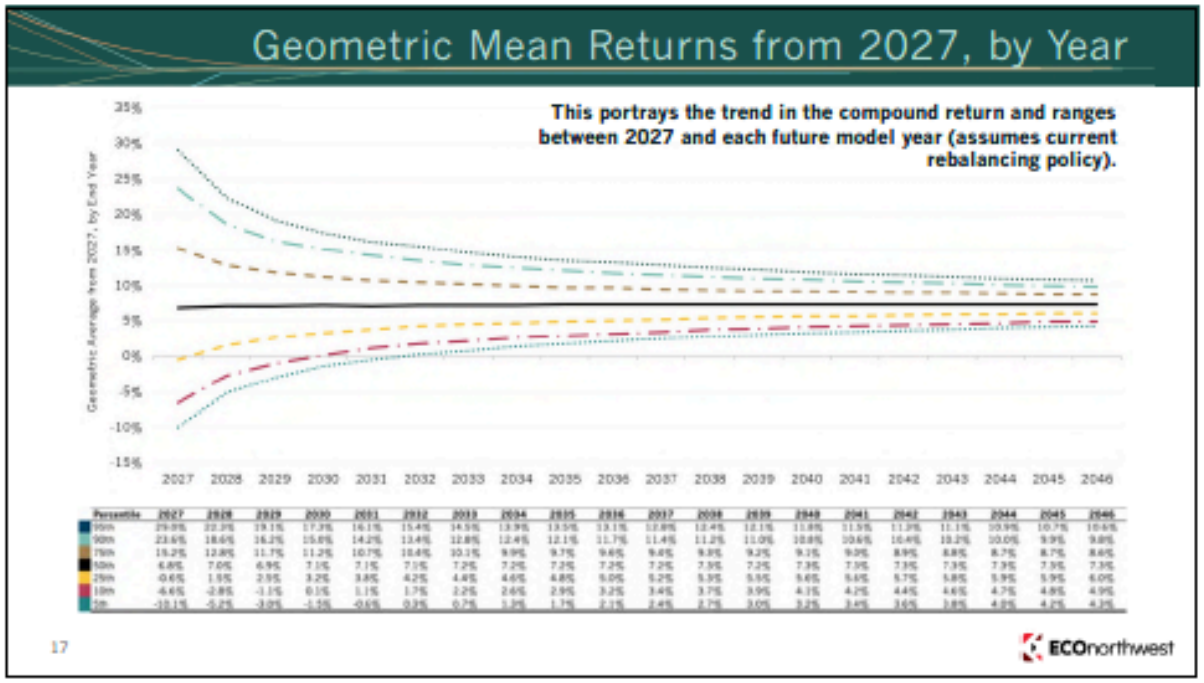
Geometric Mean Returns

- Fiscal year 2047 is the assumed final year of bonds
  - The projected annualized geometric mean return over the term of the bonds is 7.3%
  - The 95th percentile return is 10.6%
  - The 5th percentile return is 4.3%
- These forecast returns are also similar to those derived by other consultants to OIC and OPERS

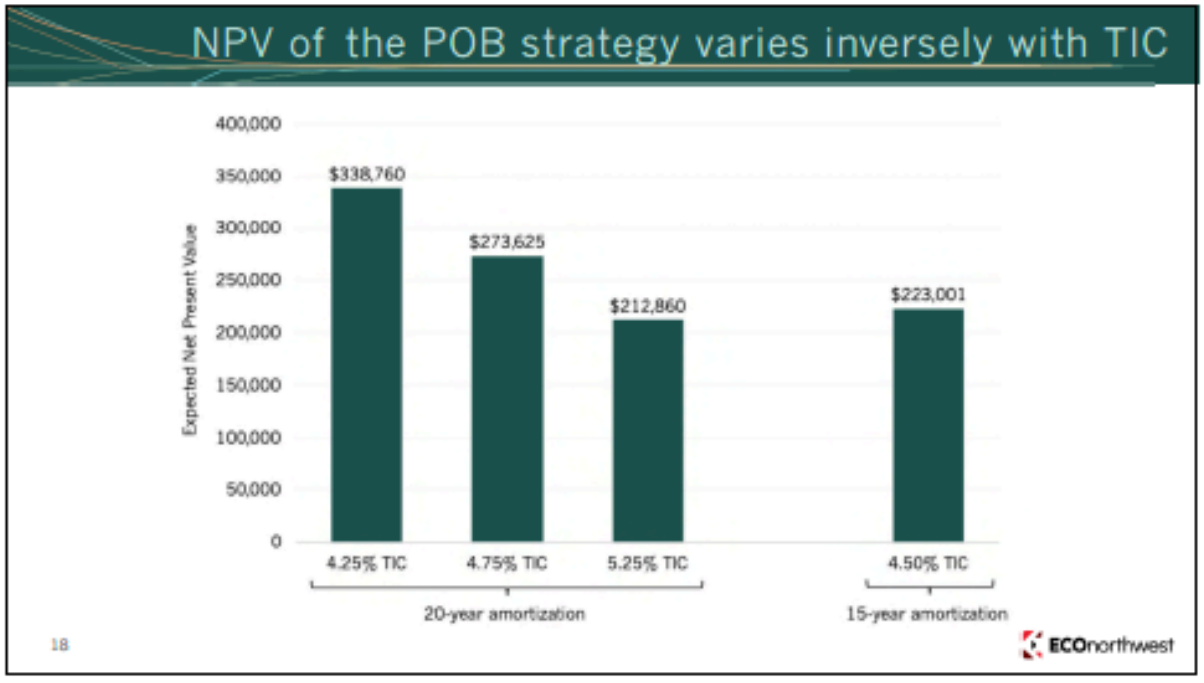
This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Geometric Mean Returns from 2027, by Year
This portrays the trend in the compound return and ranges between 2027 and each future model year (assumes current rebalancing policy).
Geometric Average from 2027, by End Year
35%
30%
25%
20%
15%
10%
5%
0%
-5%
-10%
-15%
2027 2028 2029 2030 2031 2032 2033 2034 2035 2036 2037 2038 2039 2040 2041 2042 2043 2044 2045 2046
Percentile
95th
90th
75th
50th
25th
10th
5th
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NPV of the POB strategy varies inversely with TIC
Expected Net Present Value
400,000
350,000
300,000
250,000
200,000
150,000
100,000
50,000
0
$338,760
$273,625
$212,860
$223,001
4.25% TIC
4.75% TIC
5.25% TIC
4.50% TIC
20-year amortization
15-year amortization
18
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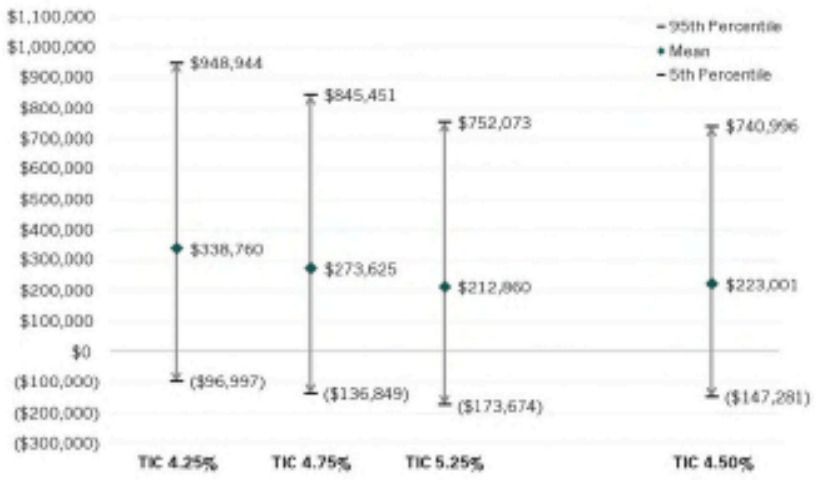
Measuring the risk of POBs

- Value at risk (VaR) provides a useful measure for the risk of POB issuance
- The 5th percentile VaR identifies the NPV that the model indicates would be exceeded with a 95 percent probability
- In other words, there is a 95 percent chance the net present value will be positive or reflect a smaller loss than the VaR and a 5 percent chance the NPV will be a larger loss.

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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The Effect of TIC on NPV of POBs



This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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POB Probability of Success: NPV > $0

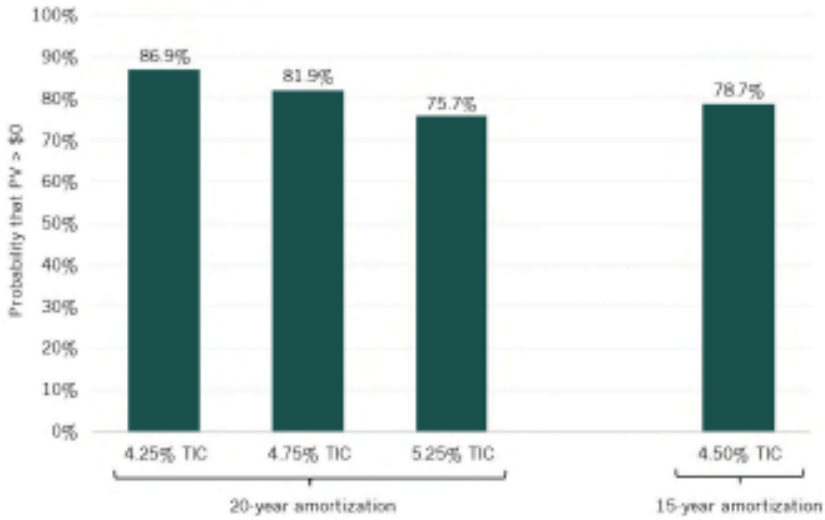
- The "probability of success" is another perspective on risk
  - The VaR measures the 5th percentile dollar value at risk
  - The "probability of success" or zero-bound identifies the overall probability that the NPV benefit is greater than zero (i.e., a success)
- Model results
  - The probability of a positive NPV is lower for higher TICs
  - Probabilities of being above zero range from a high of 86.9 percent (TIC 4.25%) to 75.7 percent (TIC 5.25%).

21 This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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21

Probability that NPV is More than $0

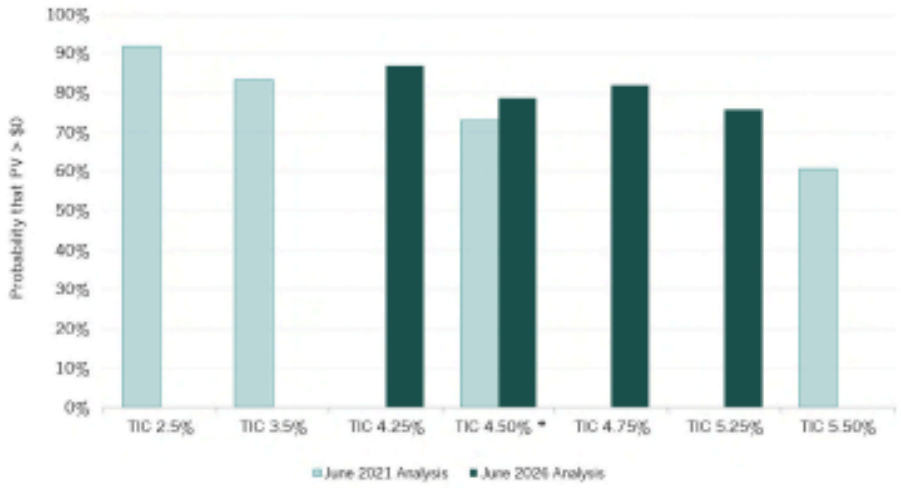


22

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Probability that NPV is More than $0



23

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23

Summary Statistics, by Scenario

No. of Tranches	1	1	1	1
Rate (TIC)	**4.25%**	**4.75%**	**5.25%**	**4.50%**
Amortization	20-year	20-year	20-year	15-year
Mean	$338,760	$273,625	$212,860	$223,001
Standard Deviation	$331,749	$311,615	$292,967	$277,432
Maximum	$2,852,079	$2,624,188	$2,412,621	$2,313,506
Minimum	-$360,859	-$385,237	-$408,140	-$350,110
95th percentile	$948,944	$845,451	$752,073	$740,996
90th percentile	$772,437	$681,309	$597,553	$588,324
75th percentile	$513,522	$439,198	$369,087	$374,365
50th percentile	$286,353	$224,666	$166,977	$180,804
25th percentile	$102,273	$51,484	$5,132	$26,369
10th percentile	-$29,659	-$73,001	-$113,778	-$88,167
5th percentile (VaR)	-$96,997	-$136,849	-$173,674	-$147,281
Zero Bound percentile	86.9%	81.9%	75.7%	78.7%

This table summarizes the simulations of the net present value of potential gains from implementing a POB strategy. All dollar amounts are per $1 million of POB funding.

24

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24

Conclusions

- The expected value to employers of a POB strategy is positive in net present value terms
  - The expected value is non-trivial proportion of POB funding under the scenarios modeled (from 21 to 34 percent)
- However, there is also a non-trivial probability that the net present value of POBs is zero or less, and the probability increases with TIC
- Important considerations for individual employers
  - The actual issuance TIC
  - Some issuance costs are not included in TIC
  - Whether the employer's payroll growth rate is the same as currently assumed by the PERS actuary
  - Systematic deviation of OPERS investment decisions and/or market outcomes from those embedded in the model will reduce model accuracy

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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Acknowledgements, Caveats, and Disclaimers

The authors wish to acknowledge the kind assistance of staff of the Oregon State Treasury, Investment Division for their kind assistance and generous provision of capital market assumptions. We also wish to thank Carol Samuels of Piper Sandler & Co. for her assistance in providing insight into muni market conditions. None of the statements or analysis herein should be attributed to anyone other than ECONorthwest staff.

The analysis provided in this document was developed by ECONorthwest for informational purposes only. All possible professional care was taken to prepare a realistic emulation of the likely POB side account behavior, and the OPERS procedures for accommodating POBs. State of the art modeling and statistical software was employed in this exercise. It should be recognized, however, that there are practical limits to the precision with which market and agency behavior can be modeled. The generic nature of the modeling performed may or may not be relevant to the circumstances of any one public employer. Additionally, nothing herein should be construed as offering investment advice or fairness opinions for the purpose of issuing securities. For this, interested parties should seek out professional counsel.

This analysis takes the narrow perspective of measuring the potential benefits of POB issuance to current employers and taxpayers. Whether use of pension obligation bonds is good public policy is a matter of professional debate and is not addressed herein.

This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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ITEM FOR ACTION AT A FUTURE MEETING

TIGARD ENTERPRISE ZONE FEE

SUMMARY
Legislation passed in 2023 requires school districts with identified enterprise zones within the district boundaries to establish a "school support fee" rate that applies only to businesses that qualify for both the enterprise zone and extended benefits beyond the standard enterprise zone duration. Any revenues received from the fee will be redistributed statewide via the school funding equalization formula.

BACKGROUND
House Bill 2009, passed during the 2023 legislative session, included provisions that created a new "school support fee" to be paid to school districts in lieu of property tax by businesses that are granted tax exemptions in enterprise zones. This does not apply during the standard enterprise zone duration, only to years 4 and 5 if a company applies and qualifies for extended benefits.

The school support fee rate must be set between 15% and 30% of the amount the qualifying business would otherwise have paid in property taxes. For example, if the business were waived $10,000 in property taxes in year 4 of the exemption, that business would now pay between $1,500 and $3,000 in the form of a school support fee instead.

The school support fee will be paid to school districts and will be counted as district local revenue in the State School Fund formula, similar to the existing process in which locally collected property taxes are calculated into the State School Fund formula. The effect is that any revenue received from the school support fee will be redistributed statewide via the school funding equalization formula rather than solely benefiting the individual districts.

Based on an assessment of several commercial properties around the affected area, the total average assessed value for the commercial properties was about $2.5 million and had an average property tax payment of about $46,000, without enterprise zone tax reductions. Hence, if the school support fee applied to any properties in our district, the estimated impact would be roughly:

Per $1 million assessed value of improvements	**Total waived taxes, including school taxes**	**Estimated revenue to Oregon schools**	**Estimated revenue to Beaverton schools**
Year 1	$18,400	$0	$0
Year 2	$18,400	$0	$0
Year 3	$18,400	$0	$0
Year 4, if EZ is extended	$18,400	$2,760–$5,520	$190–$381
Year 5, if EZ is extended	$18,400	$2,760–$5,520	$190–$381
After EZ benefits expire	Increased property tax revenues based on value of improvements		

Beaverton School District does not discriminate in any programs or activities 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.

RECOMMENDATION

The administration recommends establishing the rate of 15% for enterprise zones within our district boundaries, consistent with the City of Beaverton, the City of Hillsboro, and the rate established by the Tigard-Tualatin School District.

This is presented for initial consideration and will come before the board for approval at its next meeting.

Memorandum

TO: **Beaverton School District Board**

FROM: **Sean Farrelly, Redevelopment Manager, City of Tigard**

DATE: **Thursday, October 8, 2026**

RE: **Tigard Enterprise Zone and Beaverton School District**

The City of Tigard has asked both Tigard Tualatin School District and the Beaverton School District to consider a school support fee of between 15% to 30% so that it can re-designate its Enterprise Zone (EZ). This would enable us to continue to offer this incentive, which has already resulted in significant investment and job creation.

On September 14th, the Tigard-Tualatin School District Board of Directors approved a resolution establishing a school support fee of 15% for the Tigard EZ. The packet of materials from that meeting is attached.

We hope the information provided in our September 14, 2026 memo (attached) and the attached Resolution addresses any questions. The supplemental information supports that the Tigard EZ will likely have minimal financial impact on the Beaverton School District.

We appreciate your support of an economic tool that will help not only Tigard but the surrounding communities with an increase in family wage jobs.

Contact: If you have any questions please contact Redevelopment Manager, Sean Farrelly, 971.268.0980, sean@tigard-or.gov 13125 SW Hall Boulevard. Tigard, Oregon 97223 • tigard.or.gov

Tigard-Tualatin School District 23J
6960 SW Sandburg Street
Tigard, OR 97223

September 14, 2026

TO: Board of Directors
FR: Jessica Seay
RE: Resolution 2627-04 – Establishing a School Support Fee for the City of Tigard Enterprise Zone

BACKGROUND:
In the 2023 legislative session, HB 2009 passed resulting in:

- The creation of a limited research and development tax credit for semiconductor companies;
- Modifications to the Strategic Investment Program; and
- Extensions and modifications to Standard Enterprise Zone and Long-Term Rural Enterprise Zone programs.

HB 2009 (2023) institutes a new requirement that enterprise zone programs (Standard and Long-Term Rural) establish school support fees to address some property tax abatement matters.

Depending on the program, eligible businesses in zone programs have proscribed years of tax abatement with later years imposing a school support fee. Districts and sponsoring cities must establish a school support fee ranging from 15 to 30 percent to charge businesses in their later years of participation. This fee is considered revenue in lieu of property taxes and is included in the district's general purpose grant formula as a tax resource.

The attached resolution proposes that the District establish a 15 percent school support fee which is consistent with other districts in Washington County. The school support fee will impact Tigard's Enterprise Zone which covers areas in both Tigard-Tualatin and Beaverton School Districts' respective boundaries.

PREPARER:	Jessica Seay, Chief Financial Officer
SUPPLEMENTARY MATERIALS:	Oregon Economic Development Association and League of Oregon Cities' HB 2009 Primer; Resolution 2627-04 - A Resolution Establishing a School Support Fee for the City of Tigard Enterprise Zone
RECOMMENDATION:	Approve Resolution 2627-04
PROPOSED MOTION:	I move to accept resolution 2627-04 -A Resolution Establishing a School Support Fee for the City of Tigard Enterprise Zone

OREGON ECONOMIC DEVELOPMENT ASSOCIATION

League of Oregon Cities

IMPLEMENTATION OF NEW E-ZONE SCHOOL SUPPORT FEE

Background: In 2023, the Oregon Legislature passed HB 2009, a broad tax incentives package. The bill created a limited research & development tax credit for semiconductor companies, modified the Strategic Investment Program, and extended and modified the 3- to 5-year Standard Enterprise Zone (SEZ) and 7- to 15-year Long Term Rural Enterprise Zone (LTREZ) programs.

Key Enterprise Zone Components: HB 2009 extended the E-Zone programs through June 30, 2032. The new law now requires publication of the terms of agreements with businesses and notification to other affected local governments; eliminates eligibility for retail fulfillment centers delivering products within the region of the zone, and implements a new "school support fee" for some property tax abatement recipients.

School Support Fee: During the 4th and 5th year of abatement in the SEZ program and in the 6th year and later for the LTREZ program, companies must pay a school support fee to the local school district. Zone sponsors (cities, counties, ports, or tribes) will need to set the rate of the fee with any affected district. The fee applies the same to all abatements within the E-Zone and the particular district. The fee rate must be between 15% and 30% of the property taxes that would have otherwise been paid without the abatement in a given year. Each fee applies for all subsequent exemption agreements, in that **zone sponsors may not sign new agreements for an extended abatement or LTREZ facility after September 23rd until a fee has been established with the affected district**. Standard three-year exemptions do not require an agreement between the sponsor and company and are not affected. School districts will be responsible for annually billing the company for payments when due, and failure to remit payment can result in interest or penalties for the company.

Implementation Timing and Relevant Dates: No fees will be collected until the 4th and 5th years of tax exemption under SEZ agreements or the 6th year and beyond for LTREZ agreements, meaning no company will be invoiced until 2027 at the earliest. However, the fee will need to be established and included in any E-Zone agreement entered into after September 23rd, 2023. After that date, without an established fee rate to include in the agreement, companies will only be eligible for standard 3-year exemption periods. Zone sponsors must also set a fee rate with all applicable school districts before creating a new zone or re-designating an existing zone. For existing zones, the fee must be otherwise established between September 24th, 2023, and December 31st, 2027—***if not, the area inside the E-Zone within that school district boundary will be limited to offering 3-year tax abatements, until the zone is re-designated***.

Zone Sponsor Requirements: Zone sponsors will be responsible for including the applicable fee rate in agreements with businesses, along with possible provisions for delinquent payment, in

addition to providing information to the school district to calculate the fee for each applicable year. This must be done by November 1.

Effect on Local School Districts: School districts will be required to invoice the companies directly for any required fees. It's possible the fees will not increase local district budgets, as fees must be included as local revenue in school funding formula calculations and in most cases will be offset by reduced State School Fund distributions. Districts will still be responsible for collecting the fee, refunding overpayments and notifying local assessors of delinquent payment.

Company/Recipient Requirements: Extended SEZ and LTREZ recipients will be responsible for remitting the applicable fee to the affected school districts.

FAQ's

What if the district is not interested in charging the fee because they value the economic development benefits? Does this put the zone in a position where it can't offer extended abatements?

- HB 2009 is not permissive. All extended SEZ and LTREZ abatements will require paying the school support fee. Certainly, one impact of HB 2009 may be the reduced use of extensions to recruit and investment from existing businesses and new companies within E-Zones.

How does the fee benefit schools?

- While the increased fees to local districts will likely be offset by the reduced State School Fund distributions, statewide funding for schools may marginally increase: depending on whether zone sponsors elect to negotiate the fee and offer and extended abatement. The Legislature determines allocations of the State School Fund during its biennial budget process.

Do we know how the state will use the revenue from the fee?

- Proceeds will be directed to the statewide school equalization system.

Will districts look to streamline the billing process or use a third-party vendor?

- *We are still working with schools and school district organizations to understand implementation.*

How will the fee be calculated and what is the timeline for billing?

- The amount of the school support fee of each affected school district shall equal the respective rate agreed to by the Zone sponsor and affected school district (a rate between 15-30%),

multiplied by the property taxes that would, but for the exemption, be due on the qualified property for each property tax year to which the agreement relates. Districts are to give notice to the business by December 1 of each year, and to have collected the fee no later than December 31.

Are penalties allowed if the company fails to pay, and will it impact on E-zone qualification?

- Yes. The Zone sponsor and business may agree on interest rates and penalties for late payments, as well as means and schedule to cure delinquency. If payments are 60 days past any delinquency date (which would be December 31 if nothing else is provided for in the agreement with the business), the district shall notify the county assessor. Once the assessor is notified the company will be disqualified from any future year of abatement and the amount of any unpaid fee amount added to the business's tax liability.

What are the implications on lessors of property subject to the fee and how can responsibility be allocated amongst parties?

- Ultimately, the company receiving the abatement is responsible for paying the school support fee. Nothing in the statute dictates how parties may allocate the fee between lessors and lessees. Owners of leased enterprise zone property should not ultimately owe the property taxes, so that payment of the fee naturally falls to the business leasing the property and enjoying the property tax savings from using the enterprise zone

Are existing E-Zone abatement recipients affected by the fee or required to pay?

- Not unless the business enters into a new agreement on a new project.

Should we contact our local districts soon?

- Yes. It is possible many districts are unaware of the changes or the implications of this new law. OEDA, AOC and LOC are working to coordinate with Business Oregon and statewide school district organizations to try and standardize and streamline the process for agreeing up on rates.

Tigard-Tualatin School District 23J
Resolution 2627-04

A Resolution Establishing A School Support Fee For The City Of Tigard Enterprise Zone

WHEREAS, House Bill 2009 (2023) was enacted in 2023 and became part of ORS 285C.067;

WHEREAS, HB 2009 (2023) requires the governing body of each school district along with the governing body of the zone sponsor to set a rate for the school support fee imposed pursuant to Sections 48 (2) and 51 (2) of HB 2009 (2023); and

WHEREAS, the rate must be at least 15 percent and not more than 30 percent; and

WHEREAS, the District has coordinated with the City of Tigard to set the rate;

WHEREAS, by November 1 in any applicable year, the governing body of the zone sponsor will provide the District with all information necessary for the District to collect the fee directly from the business firm;

WHEREAS, by December 1 in any applicable year, the District shall send the business firm a notice of the required fee, with a due date not later than December 31 of the same year;

WHEREAS the District shall be responsible for making refunds to business firms of overpayments;

WHEREAS, if a fee payment is delinquent for more than 60 days following the date of delinquency or any later date allowed for curing the delinquency, the Board shall give written notice of the delinquency to the business firm and the assessor of the county;

BE IT THEREFORE RESOLVED that the Tigard-Tualatin School District Board and the governing body of the City of Tigard establish the rate of the school support fee of 15 percent, effective November 1, 2026.

ADOPTED this 14th day of September, 2026, by Tigard-Tualatin School District 23J.

David Jaimes, Board Chair Signature

Iton Udosenata, Superintendent Signature

Memorandum

Tigard Enterprise Zone and Beaverton School District

TO: **Steven A. Sparks, AICP, Executive Director for Long Range Planning, Beaverton School District**

FROM: **Sean Farrelly, Redevelopment Manager, City of Tigard**

DATE: **Monday, September 14, 2026**

RE: **Tigard Enterprise Zone and Beaverton School District**

This is a brief explanation of how the Tigard Enterprise Zone (EZ) overlaps with the Beaverton School District and the implications of that designation.

Background: The Tigard EZ was originally adopted in 2014 and has been in place for over a decade. The EZ offers tax exemption benefits for a limited duration to eligible companies that make an investment of at least $500k and increase employment that meets income and benefits standards within the zone.

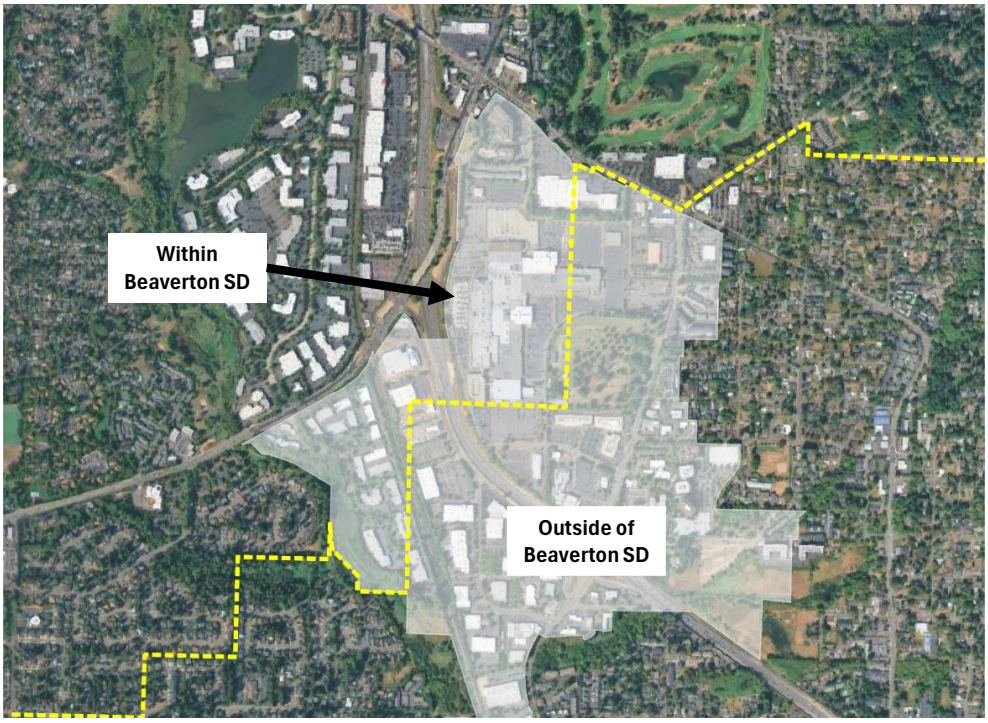
The requirement to establish a "school support fee" is relatively new (2023), and as Tigard looks to renew its EZ, this fee would be a new benefit to the school district, that wasn't previously in place.

The portion of Tigard's EZ within the Beaverton School District is small (*see Map 1 below*). It includes the Washington Square Mall and some adjacent parcels, as well as some properties across Hwy 217 to the west. Map 2 shows the Tigard EZ boundary, with the portion that overlaps with Beaverton SD at the far north end.

In practice: Since 2014, no company within the portion of the Enterprise Zone that is in Beaverton School District has applied for, or used, EZ tax benefits. Therefore, up to this point, the zone has not had any impact on taxing jurisdictions in that area, including the school district.

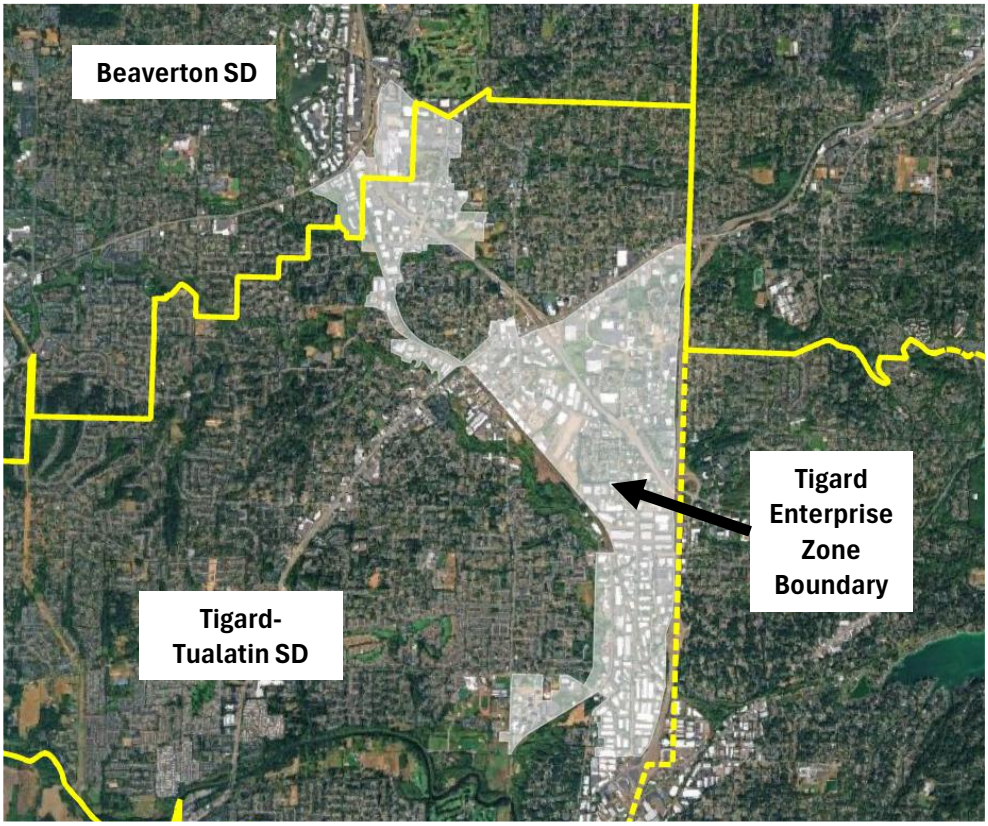
As Map 1 shows, that area of overlap is now essentially built out. The odds that a new high-investment business meeting the eligibility criteria for EZ benefits will develop in that area are probably low. While it's possible a company in this area may apply for the EZ program in the future, the most likely outcome is that the Tigard EZ program continues to have no impact on Beaverton SD (or other taxing jurisdictions in that area of overlap).

Map 1: Portion of Tigard EZ with the Beaverton School District



Source: Metro RLIS GIS

Map 2: Boundaries of Tigard EZ and School Districts



Source: Metro RLIS GIS

Establishing a School Support Fee: New rules require the sponsor of a new or re-designated Enterprise Zone to reach an agreement with any school district(s) included in the boundary. The school support fee does not apply during the standard duration of EZ benefits (3 years) but applies if the company applies for extended benefits for years four and/or five. If the company does extend its participation, it *currently* will pay a "community support fee" to the city. Under these new rules, it would also pay a "school support fee" to the school district in which the company is located.

The school support fee can be set at a rate from 15% to 30% of the company's total exempted taxes for that year. The current permanent tax levy of the Beaverton School District in the relevant tax code area was an estimated 25.8% of the total levy in the 2025 tax year. This means that if the school support fee for the EZ program is set at 26% or higher, there would be no net revenue impact on the school district in extension years.

Does the School District Actually Lose Tax Revenue? Not directly. The Oregon statewide school funding system pools revenue from districts across the state into the State School Fund. The Fund then disperses money for all K-12 public schools in the state, allocating monies to districts on a per-pupil basis, not based on the total taxes collected in that district. In practice, reductions in taxes collected in Oregon school districts caused by programs like enterprise zones, or urban renewal districts, are not felt directly by the individual school districts, but absorbed by the much larger state school system.

The goal of an enterprise zone program is attracting new investment that qualifies the company to participate in an EZ, resulting in a new, higher tax base for that property once a company's eligibility ends (after 3 to 5 years). All taxing jurisdictions, including the school district, then benefit from this new higher tax base from the company's investment.

Why Does Tigard Need the School District's Help? The 2023 statute states that the EZ sponsor (the city) shall come to an agreement with the school districts on the rate of a school support fee [ORS 285C.067(1)(b)]. It does not specify what happens if the sponsor and district can't come to agreement.

The City of Tigard is asking the Beaverton School District to agree to a school support fee so that it can re-designate the Enterprise Zone and continue to offer this incentive, which has already resulted in significant investment and job creation in other parts of the Enterprise Zone. The Tigard-Tualatin School District is concurrently agreeing to a school support fee of 15%.

These agreements are the last component needed by the City of Tigard to re-designate the EZ, which we hope to complete in December 2026. The city is asking the school district to

consider agreeing to a school support fee of 15% to 30%. For the reasons discussed above, the ultimate impact on the school district may be very minimal or even have no impact.

Contact: If you have any questions please contact Redevelopment Manager, Sean Farrelly, 971.268.0980, sean@tigard-or.gov 13125 SW Hall Boulevard. Tigard, Oregon 97223 • tigard.or.gov

Beaverton School District Board of Education

Resolution No. 26-____

WHEREAS, HB 2009 (2023) was passed in 2023 and became part of ORS 285C.067;

WHEREAS, HB 2009 (2023) requires the governing body of each school district along with the governing body of the zone sponsor to set a rate for the school support fee imposed pursuant to Sections 48 (2) and 51 (2) of HB 2009 (2023);

WHEREAS, this rate must be at least 15 percent and not more than 30 percent;

WHEREAS, the district has coordinated with the governing body of the City of Tigard to set the rate;

WHEREAS, by November 1 in any applicable year, the governing body of the zone sponsor will provide the district will all information necessary for the district to collect the fee directly from the business firm;

WHEREAS, by December 1 in any applicable year, the district shall send to the business firm a notice of the required fee, with a due date not later than December 31 of the same year;

WHEREAS, the district shall be responsible for making refunds to business firms of overpayments;

WHEREAS, if a fee payment is delinquent for more than 60 days following the date of delinquency or any later date allowed for curing the delinquency, the Board shall give written notice of the delinquency to the business firm and the assessor of the county;

BE IT THEREFORE RESOLVED that the Beaverton School District Board and the governing body of the City of Tigard establish the rate of the school support fee of 15 percent, effective December 1, 2026.

ATTEST: Board of Directors

_____

Board Chair: _____

City of Tigard

_____

Board Chair: _____

ITEM FOR ACTION AT A FUTURE MEETING

OREGON SCHOOL BOARDS ASSOCIATION ELECTION

SUMMARY
At the next business meeting, the board will vote in the Oregon School Boards Association 2026 election on OSBA board position 15 and a resolution to amend OSBA's bylaws.

BACKGROUND
Beaverton School District is a member of the Oregon School Boards Association, a statewide association that supports K–12 public school boards, education service district boards, community college boards and the state board of education.

OSBA is governed by a member-elected board with 23 representatives elected from geographic regions across the state and representatives of two established caucuses (board members of color and rural school boards). Beaverton is in OSBA's Washington Region, which is represented by three board positions: Position 15, currently held by Clinton Nelson from Gaston; Position 16, Tristan Irvin from Tigard-Tualatin; and Position 20, Nancy Thomas from Hillsboro. Position 15 is up for election in 2026.

Candidates for election must be nominated by official action of a member board within the region. Member boards in each region then vote to elect candidates to their region's board positions.

Member boards vote on candidates and resolutions during OSBA's annual election period in the fall. Voting is open from October 15 through December 15, 2026. Candidates are voted on by member boards in their region, and each board has one vote. Resolutions are voted on statewide, with a weighted voting system based on student population, so as a large district Beaverton has multiple votes. Boards vote as a body, not as individuals; a majority vote determines how the board's votes will be cast with OSBA.

The board is asked to vote on OSBA board position 15, which has three candidates:
- David Jaimes (Tigard-Tualatin School Board)
- Clinton Nelson – Incumbent (Gaston School Board)
- Syed Qasim (Beaverton School Board)

The board also is asked to vote on one resolution:
- Resolution 1 – Amend the OSBA Bylaws

The proposed resolution and candidate information are included in the agenda packet.

RECOMMENDATION
This is presented for initial consideration and discussion. At the next meeting in November the board will vote as a body on the board position and resolution, and staff will record the board's votes with OSBA.

Beaverton School District does not discriminate in any programs or activities 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.

Tigard-Tualatin School District 23J
6960 SW Sandburg Street
Tigard, OR 97223

Date: September 14, 2026

TO: Board of Directors

FR: David Jaimes, Board Chair

RE: Oregon School Boards Association Board of Directors Nomination

EXPLANATION: The Oregon School Boards Association (OSBA) Board of Directors has 20 representatives from 14 regions throughout the state. The Tigard-Tualatin School District is located in the Washington Region.

Board Director David Jaimes has expressed an interest in being nominated for position #15 in the Washington County Region. Nominations are due to OSBA no later than September 30, 2026. Voting will occur between October 15, 2026 through December 15, 2026. A nomination to the OSBA Board of Directors will require official action of our board of directors. This evening we ask the Board to provide a motion to nominate Board Director David Jaimes for the OSBA Board of Directors position #15.

PRESENTER: Chair David Jaimes

SUPPLEMENTARY MATERIALS: OSBA's Election Calendar, and Board Director David Jaimes's Nomination Form

RECOMMENDATION: Board Director David Jaimes for Position #15 on the Oregon School Boards Association Board of Directors, as presented.

PROPOSED MOTION: I move that the Tigard-Tualatin School Board of Directors recommends the nomination of Board Director Jaimes for Position #15 on the Oregon School Boards Association Board of Directors, as presented

NOMINATION FORM
OSBA BOARD OF DIRECTORS
REGIONAL MEMBER

Date: 09/14/2026

TO:
José Gamero-Georgeson
OSBA President-Elect
Oregon School Boards Association
1201 Court St NE, #400
Salem, OR 97301
Fax: 503-588-2813
E-mail: *elections@osba.org*

Nominations are due by 5 pm, September 30, 2026

Return this form and all candidate information forms to the OSBA office by email at *elections@osba.org*, or mail to Oregon School Boards Association, 1201 Court St. NE, #400, Salem, OR 97301

Dear José Gamero-Georgeson:

With this letter, our board nominates the candidate named below to a position on the OSBA Board of Directors for the Washington Region, Position # 15.

BOARD CANDIDATE INFORMATION

Name: David Jaimes
District/ESD/Community College: Tigard Tualatin School District
Address: 16596 SW 134th terrace
City: Tigard Oregon ZIP: 97224
E-mail: board.member.jaimes@ttsd.k12.or.us Phone: 503-475-9847

This nomination was approved by official action of our board of directors at a duly called meeting on 09/14/2026.
(date)

(Board Chair signature)

Board Chair name: David Jaimes
District: Tigard Tualatin School District
Address: 6960 SW Sandburg st
City, State, Zip: Tigard, OR, 97223

OSBA Board of Directors
CANDIDATE QUESTIONNAIRE

Name: David Jaimes

Date: _____

Address: [redacted]

City/Zip: [redacted]

Business phone: [redacted]

Residence phone: [redacted]

Cell phone: [redacted]

E-mail: boardmember.jaimes@ttsd.k12.or.us

District/ESD/CC: Tigard Tualatin School District

Term expires: 2029 Years on board: 5

Region: Washington

Position #: 15



I certify that if elected I will faithfully serve as a member of the OSBA Board of Directors. My nomination form has been submitted to OSBA (or is attached to this document) as evidence.

David Jaimes

Name

9/14/2026

Date

Be brief; please limit your responses to 50 words per question.

1. Describe in your own words the mission and goals of OSBA.

   The Oregon School Boards Association (OSBA) centers its mission around empowering public school board members across Oregon by equipping them with the practical skills, resources, and governance tools needed to foster high student achievement and advance educational equity. Rather than managing day-to-day school operations, OSBA focuses on helping local school boards govern effectively and advocate for public education at the state level. OSBA also ensures that race is not a predetermined outcome of success for students, by helping focus on the racial opportunity gap. Moreover, they maintain that local-control is a must to ensure that school distrcits thrive and have autonomy in their decision making.

2. What do you want to accomplish by serving on the OSBA board of directors?

   Serving on the OSBA Board of Directors is an opportunity to elevate school board governance across Oregon, ensuring every local board has the support, advocacy, and resources needed to drive high student achievement. I will focus on: Strengthening State-Level Advocacy, Advancing Educational Equity, Empowering Local Governance, and Building Coalition & Community Engagement with in the Washington region as well as throughout the state of Oregon.

3. What leadership skills do you believe you bring to the board of directors? Give an example of a situation in which you demonstrated these skills.

   Throughout my five years on my local school board, alongside my work on the OSBA Board, COSA Equity Board, and Members of Color Caucus, I have consistently championed equity and inclusive representation at every level of decision-making. When our region faced the complex challenge of aligning local strategic plans with statewide educational standards and equitable funding goals, I drew directly on my multi-board background to lead key discussions. Leveraging my perspective from TSPC and the Members of Color Caucus, I helped facilitate cross-organizational dialogues between local board members, administrators, and community leaders. By grounding our work in systemic equity and practical policy oversight, I helped guide the board to establish clear, measurable equity outcomes in our strategic planning while ensuring that the voices of historically underrepresented students and educators directly shaped our statewide advocacy

OSBA Board of Directors

4. What do you see as the two most challenging issues faced by OSBA?

   1. Securing Right-Sized, Sustainable Funding, Often fails to keep pace with rising operational costs. Districts across the state face structural budget deficits driven by declining post-pandemic enrollment, mounting PERS retirement liabilities, expanding special education needs, and unfunded state mandates.

   2. Overcoming Stagnant Academic Achievement & Opportunity Gaps.Across Oregon, student proficiency levels in core subjects like math, reading, and science remain lagging, compounded by chronic absenteeism and persistent opportunity gaps for historically underserved student groups.OSBA must equip local board members with data-driven governance tools, policy frameworks, and equity-focused training.

5. What do you see as the two most challenging issues faced by your region?

   Unfunded mandates like unemployment insurance obligations and rising benefit cost drivers continuously pull dollars away from the general fund. When statewide funding mechanisms fail to absorb these mandatory cost spikes, suburban and mid-sized districts like Tigard Tualatin, are forced to absorb the difference through painful budget cuts, reserve drawdowns, and staff reductions. High Cost Disability Account only reimburses a fraction (often around 40%) of the actual expenditures districts incur for students requiring intensive, specialized care and dedicated support staff. In Tigard-Tualatin alone, high-cost special education services create millions in net unfunded annual liabilities.

6. What is your plan for communicating with boards in your region?

   Monthly Board Chairs Roundtable: Leverage the monthly meetings with regional board chairs as a primary two-way feedback loop—sharing OSBA legislative updates, policy tools, and statewide initiatives while gathering real-time regional concerns. Utilize this space to collaborate on shared suburban and mid-sized district challenges (such as high-cost disability funding liabilities and unfunded operational mandates), brainstorming collective solutions and unified advocacy strategies.

   Targeted OSBA Briefings: Send concise, actionable post-meeting summaries or monthly digest updates to all school board members across the region, highlighting key OSBA resources, upcoming equity trainings, and board development opportunities.

Please continue to the next section.

2026 OSBA Elections Calendar
Adopted by the Board: January 23, 2026

Nomination and election of regional members of the OSBA board of directors holding odd-numbered positions and any positions made necessary by vacancy or appointment.		
August 1, 2026		Notice of position vacancies, candidate information packets, and official nomination forms shall be distributed to all incumbent directors and boards in eligible regions.
August 1, 2026, through September 30, 2026		A school board nominating one or more of its regional board members to the OSBA board of directors must do so by formal resolution of the board and timely submission of the nomination forms to the office of the OSBA. Nominations are closed after this date.
No later than October 15, 2026		Official ballots are distributed to member boards in each region, but no later than October 15.
Upon receipt of ballot through December 15, 2026		Submission of votes to OSBA. Each member board will vote as a board on each item of OSBA business and submit the votes to OSBA via the OSBA website prior to December 15, 2026. Each member board in the appropriate region shall have one vote in the regional elections for members of the OSBA board of directors. The person receiving a majority of the votes cast for any position on the OSBA board of directors shall be elected.
As soon as possible		In cases where there are more than two candidates nominated for any position, and none receives a majority of the votes cast, a second ballot shall be required between the two candidates receiving the highest number of votes. The one receiving a majority of the votes cast shall be declared elected.
January 1, 2027		Newly elected officers and regional members of the OSBA board of directors officially take office.

OSBA Resolution Election		
No later than September 30, 2026		All resolutions to be submitted to the membership for a vote must be received at the OSBA offices.
No later than October 15, 2026		Resolution details, along with an official ballot, will be sent to the membership.
Upon receipt of ballot, through December 15, 2026		Each member board in the state shall vote in the general election on resolutions.

OSBA Officer Elections		
September 18-20, 2026, or no later than October 31, 2026		The currently seated OSBA board of directors meets to elect officers. Candidates receiving a majority of the votes cast for any officer position on the OSBA board shall be elected.

OSBA Board of Directors
CANDIDATE PERSONAL/PROFESSIONAL RESUME

Work or service performed for OSBA or local district (include committee name and if you were chair):

Board Chair for Tigard Tualatin School District. Member of the TTSD Financial Oversight Committee. Former Vice president of the Members of Color Caucus. Former OSBA board member.

Other education board positions held/dates:

Former Member of the COSA Equity board. Former TSPC Commisioner. Former member of OABE board.

Occupation (Include at least the past five years):

Employers:	Dates:
Salem Keizer Public Schools	08/01/2024 - present
Reynolds School District	02/15/2022 - 06/15/2024
Newberg Public Schools	08/01/2020 - 02/15/2022

Schools attended (Include official name of school, where and when):

High school: North Eugene High School

College: University of Oregon, Portland State University

Degrees earned: Business Administration, Educational Masters

Education honors and/or awards:

Other applicable training or education:

Administrator's License

Professional Administrator's License

Activities, other state and local community services:

Hobbies/special interests:

Oregon Ducks Football

Golf

Hiking

Business/professional/civic group memberships; offices held and dates:

Additional comments:

NOMINATION FORM
OSBA BOARD OF DIRECTORS
REGIONAL MEMBER

Date: 9/8/2026

TO:
José Gamero-Georgeson
OSBA President-Elect
Oregon School Boards Association
1201 Court St NE, #400
Salem, OR 97301
Fax: 503-588-2813
E-mail: elections@osba.org

Nominations are due by 5 pm, September 30, 2026

Return this form and all candidate information forms to the OSBA office by email at elections@osba.org, or mail to Oregon School Boards Association, 1201 Court St. NE, #400, Salem, OR 97301

Dear José Gamero-Georgeson:

With this letter, our board nominates the candidate named below to a position on the OSBA Board of Directors for the Washington Region, Position # 15.

BOARD CANDIDATE INFORMATION

Name: Clinton Nelson
District/ESD/Community College: Gaston School District
Address: PO Box 186
City: Gaston Oregon ZIP: 97119
E-mail: clinton.nelson@gastonk12.org Phone: 503-528-4671

This nomination was approved by official action of our board of directors at a duly called meeting on 9/8/2026.
(date)

Jessica L Clark
(Board Chair signature)

Board Chair name: Jessica Clark
District: Gaston
Address: 300 Park St.
City, State, Zip: Gaston, OR 97119

OSBA Board of Directors
CANDIDATE QUESTIONNAIRE

Name: CLINTON NELSON Date: 9-23-2026

Address: [redacted]

City/Zip: [redacted]

Business phone: [redacted]

Residence phone: SAME

Cell phone: SAME

E-mail: CLINTON.NELSON@GASTONK12.ORG

District/ESD/CC: GASTON SD 511J

Term expires: 2027 Years on board: 16

Region: WASHINGTON Position #: ~~8~~ 15



I certify that if elected I will faithfully serve as a member of the OSBA Board of Directors. My nomination form has been submitted to OSBA (or is attached to this document) as evidence.

CLINTON Nelson

Name

09-23-2026

Date

Be brief; please limit your responses to 50 words per question.

1. Describe in your own words the mission and goals of OSBA.

HELP OREGON SCHOOL BOARDS GOVERN AND ADVOCATE FOR STUDENT SUCCESS.

SECURE FUNDING THATS ADEQUATE TO KEEP SCHOOLS OPEN, AND LOBBY FOR IMPROVED LEGISLATIVE CONDITIONS FOR SCHOOLS

2. What do you want to accomplish by serving on the OSBA board of directors?

ASSISTING IN THE FULFILLMENT OF THE OSBA MISSION AND GOALS, BY PROVIDING A VOICE AND PERSPECTIVE FOR THE SMALLER SCHOOL DISTRICTS IN WESTERN WASHINGTON REGION

3. What leadership skills do you believe you bring to the board of directors? Give an example of a situation in which you demonstrated these skills.

COURAGE AND RISK TOLERANCE.

WHEN IT WAS TIME TO REBUILD A PORTION OF MY DISTRICT, I CHALLENGED SUGGESTED CONSTRUCTION IDEAS WITH OTHER OPTIONS SAVING MY DISTRICT THOUSANDS OF DOLLARS.

OSBA Board of Directors

4. What do you see as the two most challenging issues faced by OSBA?

SEVERE BUDGETARY ISSUES DRIVEN BY OUTDATED SCHOOL FUNDING FORMULAS.

DECLINING ENROLLMENT WITH SOARING OPERATIONAL AND LABOR COSTS FOR DISTRICTS.

5. What do you see as the two most challenging issues faced by your region?

DRAMATIC INCREASES IN SPED

UNREASONABLE RATE INCREASES IN PERS

6. What is your plan for communicating with boards in your region?

I WILL CONVEY NECESSARY INFORMATION IN-PERSON BY ATTENDING BOARD MEETINGS, E-MAILING MEMBERS IN MY REGION, AND PARTICIPATING IN ONLINE GATHERINGS.

Please continue to the next section.

OSBA Board of Directors
CANDIDATE PERSONAL/PROFESSIONAL RESUME

Work or service performed for OSBA or local district (include committee name and if you were chair):
SINCE MY APPOINTMENT, I HAVE ATTENDED EVERY BOARD AND LPC MEETINGS IN PERSON OR ONLINE.

Other education board positions held/dates:
SCHOOL BOARD MEMBER 07/2011 - 07/2027
BOARD CHAIR 07/2021 - 07/2026
POLICY, NEGOTIATIONS, CIRRICULUM, PUBLIC RELATIONS COMMITTEES

Occupation (Include at least the past five years):
Employers: STOLLER FAMILY ESTATE VINEYARD TECHNICIAN Dates: 06/2017 - PRESENT

Schools attended (Include official name of school, where and when):
High school: LOMPOC UNIFIED High School
College: —
Degrees earned: —

Education honors and/or awards:
HighSchool LETTER IN ORCHESTRA AS 1ST CHAIR VIOLA
"GOLDEN G" AWARD FOR PARTICIPATION IN BOND OVERSIGHT COMMITTEE
OSBA BRONZE, SILVER, GOLD, PLATINUM - LEADERSHIP INSITUTE GRAD

Other applicable training or education:
OLCC ALCOHOL SERVER/MONITOR LICENSE
WASHINGTON CO. PARENTING CERTIFICATE
MANDITORY REPORTING TRAINING

Activities, other state and local community services:
VOLUNTEER - CARLTON COMMUNITY FOUNDATION
PARENT VOLUNTEER - GASTON ELEMENTRY PARENT TEACHER ORG
VOLUNTEER - WAPATO SHOWDOWN CARSHOW 2012 - PRESENT

Hobbies/special interests:
HIKING THE ABANDONED TILLIMOOK RR TRACKS
GROWING PRODUCE TO DONATE TO MY COMMUNITY
SPENDING TIME WITH MY NEW GRANDKIDS.

Business/professional/civic group memberships, offices held and dates:
KNIGHTS OF PYTHIAS MEMBER 2012 - PRESENT / SECRETARY 2018 - PRES
OREGON PYTHIAN FOUNDATION TRUSTEE 10/2025 - PRESENT
KNIGHTS of PYTHIAS GRAND LODGE OF OREGON - MASTER AT ARMS 2025-NO

Additional comments:
I HOPE TO RETAIN MY POSITION ON THE OSBA BOARD REPRESENTING THE VOICE OF OUR SMALLER AND RURAL DISTRICTS IN THIS REGION

Email to elections@osba.org, or mail to: Oregon School Boards Association, 1201 Court St NE, #400, Salem, OR 97301
Materials submitted by the candidate on this form may be subject to a public information request under ORS Chapter 192.

NOMINATION FORM
OSBA BOARD OF DIRECTORS
REGIONAL MEMBER

Date: September 15, 2026

TO:
José Gamero-Georgeson
OSBA President-Elect
Oregon School Boards Association
1201 Court St NE, #400
Salem, OR 97301
Fax: 503-588-2813
E-mail: elections@osba.org

Nominations are due by 5 pm, September 30, 2026

Return this form and all candidate information forms to the OSBA office by email at elections@osba.org, or mail to Oregon School Boards Association, 1201 Court St. NE, #400, Salem, OR 97301

Dear José Gamero-Georgeson:

With this letter, our board nominates the candidate named below to a position on the OSBA Board of Directors for the Washington Region, Position # 15.

BOARD CANDIDATE INFORMATION

Name: Syed Qasim
District/ESD/Community College: Beaverton School District
Address: 1260 NW Waterhouse Ave
City: Beaverton Oregon ZIP: 97006
E-mail: syed_qasim@beaverton.k12.or.us Phone: 503-356-4401

This nomination was approved by official action of our board of directors at a duly called meeting on September 15, 2026 .
(date)

(Board Chair signature)
Board Chair name: Justice Rajee
District: Beaverton School District
Address: 1260 NW Waterhouse Ave
City, State, Zip: Beaverton, OR 97006

OSBA Board of Directors
CANDIDATE QUESTIONNAIRE

Name: Syed Qasim

Date: 09/25/2026

Address: [redacted]

City/Zip: [redacted]

Business phone:

Residence phone:

Cell phone: [redacted]

E-mail:

District/ESD/CC: Beaverton School District

Term expires: June 2029 Years on board: 1

Region: Washington

Position #: 15



is
me

I certify that if elected I will faithfully serve as a member of the OSBA Board of Directors. My nomination form has been submitted to OSBA (or is attached to this document) as evidence.

Syed Qasim

Name

09/25/2026

Date

Be brief; please limit your responses to 50 words per question.

1. Describe in your own words the mission and goals of OSBA.

   OSBA exists so Oregon's school boards can govern well and speak with one voice in Salem. It trains us, offers policy and legal support, and advocates for students. It helps boards connect the dots between goals, funding and results, so every student gets a fair shot at success.

2. What do you want to accomplish by serving on the OSBA board of directors?

   I want to help OSBA support boards get ahead of AI and education technology instead of playing catch-up: model policy, student privacy protections and shared vendor vetting. I want state funding tied to what students actually need. And I want every board to see clearly which investments are working.

3. What leadership skills do you believe you bring to the board of directors? Give an example of a situation in which you demonstrated these skills.

   Systems thinking. As a technology architect, I look at how parts connect before fixing one. I've brought that lens to the Oregon Network for Education Excellence, helping frame our challenges as one chain linking governance, goals, funding and student results. On my board, I push for lasting structures.

Email to elections@osba.org, or mail to: Oregon School Boards Association, 1201 Court St NE, #400, Salem, OR 97301

Materials submitted by the candidate on this form may be subject to a public information request under ORS Chapter 192.

OSBA Board of Directors

4. What do you see as the two most challenging issues faced by OSBA?

First, funding. Oregon spends more per student than most states, yet outcomes lag, and our formula is 35 years old. Second, edtech and AI are outpacing policy: devices, screen time, student data, AI tools. OSBA can help boards connect goals, dollars and results instead of each district deciding alone.

5. What do you see as the two most challenging issues faced by your region?

First, Washington County districts are losing students while pension and staffing costs rise, forcing cuts that reach classrooms. Second, we are Oregon's technology hub, yet capacity is uneven: small rural districts like Gaston have far less than Beaverton. Shared regional expertise on technology helps every board.

6. What is your plan for communicating with boards in your region?

Within a week of every OSBA board meeting, each of our eight boards gets a one-page brief: decisions, what's next, where your input matters. In year one, I'll attend a meeting of every board. I'll host monthly virtual office hours and survey the region's priorities before each legislative session.

Please continue to the next section.

Materials submitted by the candidate on this form may be subject to a public information request under ORS Chapter 192.

OSBA Board of Directors
CANDIDATE PERSONAL/PROFESSIONAL RESUME

Work or service performed for OSBA or local district (include committee name and if you were chair):

Beaverton School District Board of Directors, Zone 5 — elected May 2025; serving July 2025 to present (term through June 2029).
Committees: Legislative Advocacy Committee (2026-27); Budget Committee (2025 to present); Audit Committee (2025-26).

Other education board positions held/dates:

Board Member, Cool Islam - a Community based education organization providing access to education for Arabic.

Occupation (Include at least the past five years):

Employers:	Dates:
Salesforce - Senior Technology Consultant	09/2020 - Present
Planar Systems - Business Systems Manager	03/2019 - 09/2020
Nike - Product Owner for Product Data Reporting	10/2018 - 03/2019

Schools attended (Include official name of school, where and when):

High school:

College: Portland State University

Degrees earned: Bachelor of Arts, Philosophy

Education honors and/or awards:

Other applicable training or education:

Technology and Systems Certifications across Microsoft, Google and other ecosystems

Activities, other state and local community services:

Co-chair, City of Beaverton Climate Action Task Force (2021–2024)
Beaverton Inclusive Housing cohort, City of Beaverton (2020)
Board member / advisor to local nonprofits including Cool Islam and Wake Up Beaverton
Oregon Network for Education Excellence (ONE) — contributor to its statewide content and framing on education governance and funding, as

Hobbies/special interests:

Watching movies and tv shows
Playing Cricket
Community connections

Business/professional/civic group memberships; offices held and dates:

Co-chair, City of Beaverton Climate Action Task Force (2021–2024)
Beaverton Inclusive Housing cohort (2020)

Additional comments:

2026 OSBA BYLAWS BALLOT MEASURE

OSBA Governance Changes

A summary for member boards: what would change, why, and what comes next

To OSBA member boards,

In 2026, OSBA's Board Governance Committee led a review of how the association is governed. On September 19, 2026, the OSBA Board of Directors adopted a resolution to amend the OSBA Bylaws and referred it to you, our members, for a vote during the 2026 election cycle.

This summary explains what the amendments would change, why, and what would stay the same. The bylaws set the overall framework. Many supporting details would be worked out afterward through Board policy and operating procedures, with input from the people most affected. Each section lists those open details and who will decide them.

Each member board will vote on the amended bylaws as a single ballot measure. Approval requires two-thirds of returned ballots. The full text of the Board's resolution is included in the voting packet.

We encourage every member board to read the "At a Glance" page and discuss it before voting.

OSBA Board Governance Committee

At a Glance

The ballot measure contains four central changes, plus several smaller technical updates described later in this summary.

THE FOUR CENTRAL CHANGES

1

Ex-officio advisor seats. Would end the standing list of named,non-voting advisors on the Board. The Board could still invite advisors when needed.

2

Caucuses. Caucuses would advise the executive director instead of the Board. The executive director would establish caucuses using criteria the Board sets in policy. Today, adding or removing a caucus requires a member vote to amend the bylaws.

3

Caucus Council. Would create a new Caucus Council, with one representative from each caucus, to advise the Board. The two caucus seats on the Board would become two seats filled by the Board on the Council's recommendation. The Council would also have new pathways to additional leadership.

4

Legislative Policy Committee (LPC). Board members would choose whether to serve on the LPC instead of being required to. The Caucus Council would also have LPC seats (number determined in policy).

WHAT IS NOT CHANGING

Board size. The Board would keep up to 25 voting directors: up to 22 elected by region, plus 2 recommended by the Caucus Council.

Caucus seats during the transition. The two established caucuses would keep their Board seats until the new Caucus Council directors are appointed, or until the end of 2027, whichever comes first.

Caucus voice in governance. Caucuses would continue to have a path to leadership through the two Caucus Council seats and committee seats.

Board oversight of funding. The Board would continue to set caucus funding through the annual budget.

Why these changes

Members told us that the Board's size, unclear roles, and confusion between governance and advocacy are the biggest barriers to an effective Board. These changes are a first, measured step. The Governance Committee will review their impact after one year before recommending anything further, including any change to Board size.

Background

How the review was done

As part of OSBA's regular governance review cycle, the Board engaged Coraggio Group in 2026 to assess OSBA's governance structure. The assessment gathered input from:

> 188 survey respondents, 12 stakeholder interviews, and 7 focus groups, representing the Board, staff, member districts of every size, the caucuses, and the PRIDE Advisory Committee

> A review of school board association bylaws in more than 30 states

Coraggio Group reported its findings in June 2026. The Governance Committee then held a design retreat on August 3, recommended bylaws amendments on August 24, and the Board adopted and took action to refer them to the membership on September 19.

Guiding principles

Four principles, set at the start of the review, shaped which changes moved forward:

Efficiency

Design structures that make purposeful use of staff resources and board member time. Every committee, caucus, and process should add clear value.

Effectiveness

Ensure governance structures enable the board to fulfill its core responsibilities: strategic oversight, policy governance, fiduciary accountability, and organizational leadership.

Engagement

Ensure boards as entities have genuine opportunities to participate and inform decisions without creating administrative burden or unnecessary complexity.

Representation

Balance representation between boards as fundamental units and districts serving larger student populations, ensuring all member voices carry appropriate weight while maintaining geographic practicality.

What we heard

- Board size was named by every member group as the greatest opportunity to improve efficiency, and **69%** of Board and staff respondents named it as a structure that should be re-evaluated.
- Confusion between governance and advocacy was the most-cited barrier to Board effectiveness (**29%** of all respondents), followed by unclear roles (**26%**).
- Board and staff rated the Board's understanding of OSBA's Board work **2.6 out of 5**, though they rated orientation **3.9**.
- The non-voting ex-officio seats were rated the least active and least impactful Board roles. **39%** of Board and staff respondents flagged them.
- Both caucuses and the advisory committee received below-target effectiveness ratings. Members of each group flagged their own group's structure for re-evaluation: **69%** of advisory committee respondents, **63%** of Rural Caucus respondents, and **56%** of Members of Color Caucus respondents flagged their own body's structure for re-evaluation.

The Four Central Changes

1. Ex-officio advisor seats

TODAY

Up to 25 voting directors: 22 elected by region, plus one from the Oregon School Board Members of Color Caucus and one from the Oregon Rural School Board Members Caucus. The bylaws cap the Board at 25 voting persons (Sec. 3.3).

Five named, non-voting ex-officio advisors: an NSBA director elected from Oregon; the executive director of the Coalition of Oregon School Administrators; the chair-elect of the Oregon Association of Education Service Districts; the board president of the Oregon Community College Association; and the chair of the State Board of Education.

WHAT WOULD CHANGE

The named list of ex-officio advisors would be removed.

The Board could designate non-voting ex-officio advisors as needed (Sec. 3.5.4).

WHY

The ex-officio role and its relationship to the Board were never clearly defined. These seats were rated the least active and least impactful Board roles, and 39% of Board and staff respondents flagged them. Peer state associations seat 14 to 19 voting directors; OSBA seats up to 25.

2. Caucuses would advise the executive director

TODAY

Two caucuses are named in the bylaws: the Oregon School Board Members of Color Caucus and the Oregon Rural School Board Members Caucus.

Each holds a guaranteed Board seat and LPC seat and advises the Board directly.

A caucus can be created or eliminated only by a bylaws amendment approved by members.

The PRIDE Advisory Committee is not named in the bylaws. It advises the Board and has no guaranteed Board or LPC seat.

WHAT WOULD CHANGE

The executive director would establish caucuses that support OSBA's vision, mission, and goals, following criteria the Board adopts in policy.

Caucuses would advise the executive director instead of the Board. The Caucuses would no longer be approved by the membership.

The two current caucuses would no longer be named in the bylaws. The expectation is that they would be re-established under the new framework, but that would happen through policy, not through this ballot measure.

The PRIDE Advisory Committee is not addressed in the bylaws, so this measure has no immediate effect on its status. Any change would come through Board policy.

Staff support would be defined in caucus operating procedures and an executive director framework rather than in the bylaws.

The Board would continue to evaluate the executive director, providing accountability for groups that report to that position.

WHY

Today the two caucuses and the advisory committee have different budgets, seats, authority, and resources. A single framework would give every caucus the same pathway and the same rules.

Reporting to the executive director would connect caucuses more directly to OSBA staff and day-to-day operations, providing greater flexibility in how they conduct their work while supporting effective coordination and implementation.

STILL TO BE DECIDED

- Criteria and safeguards for establishing a caucus, grounds for dissolving one, and an appeal to the Board if a caucus request is denied or is dissolved (OSBA Policy Committee)
- How caucus leaders are selected, how long they serve, and how leadership rotates (caucus operating procedures)
- What staff provide to caucuses and how staff take part in their meetings (caucus operating procedures and executive director framework)
- How Oregon public meetings law applies to caucus meetings (OSBA Policy Committee, with legal review)

3. A new Caucus Council, and caucus seats on the Board

TODAY

Each of the two caucuses designates one voting director to the Board and Legislative Policy Committee.

Each caucus manages its own budget.

Adding a caucus adds a seat on both the Board and the LPC.

WHAT WOULD CHANGE

A new Caucus Council, advisory to the Board, composed of one Board-approved representative from each caucus, (Sec. 4.4.4).

The Council would recommend two people for the Board to appoint as full voting directors (Secs. 3.5, 3.5.3). These replace the two current caucus seats.

The Council would have the option to recommend a Finance Committee member, LPC members, and members to other Board committees. Recommendations would be subject to the approval of the Board.

The Council would adopt operating procedures (Sec. 4.4.2), keep minutes, report at Board meetings, follow public meetings law (Sec. 4.5), and file a year-end report (Sec. 4.4.6).

The Board would set the Council's budget (Sec. 4.4.5), as it sets caucus budgets today.

New caucuses would join the Council without adding Board seats.

Filling seats and the transition

Officer overlap. If the president or immediate past president is a Caucus Council director, the Council would select an additional director for that term (Sec. 3.5.3).

Start date. The new structure would take effect July 1, 2027, to allow time to develop the supporting policies and procedures

Transition. The two current caucus directors would keep their seats until the Board appoints the two Council directors, or until the end of 2027, whichever comes first.

WHY

One Council would give every caucus, current and future, the same pathways to leadership. The Council structure allows new caucuses to be added without expanding the Board or revising the bylaws each time a caucus is created. This provides greater flexibility while addressing member concerns about Board size.

STILL TO BE DECIDED

- The Council's operating procedures, including how it selects candidates for its two Board seats (OSBA Policy Committee)
- How Caucus Council budget is distributed to individual Caucuses (Caucus Council)

4. Legislative Policy Committee (LPC)

TODAY

Members: all voting Board members, elected regional representatives (Sec. 4.1.3(c)–(e)), the President as an ex-officio voting member, and one designee from each caucus.

Board policy (Policy 2100) requires every director to serve on the LPC.

The bylaws set two-year terms for LPC seats, with terms starting in January 1 of even-numbered years.

WHAT WOULD CHANGE

Members: Board members who choose to serve; the president (ex officio, voting); all Executive Committee members (required to serve); elected regional representatives; and members recommended by the Caucus Council (Sec. 4.1.3(b)).

Two-year terms starting January 1 of even-numbered years, with members being limited to up to five consecutive terms, then eligible again after a two-year break (Sec. 4.1.3(f)).

WHY

Requiring every director to serve on the LPC blurred the line between governance and advocacy, the barrier to effectiveness respondents named most often. Voluntary service would place directors on the LPC who are ready and have capacity for the advocacy role. Term limits would create predictable rotation and new leadership pathways. Seating Council designees would keep caucus representation on the LPC through one consistent process.

STILL TO BE DECIDED

- How directors indicate interest in LPC service, and how seats are filled (OSBA Policy Committee)
- How many Caucus Council designees serve on the LPC (Board and Caucus Council)
- How current members, and directors who join mid-cycle, move into the new term cycle (OSBA Policy Committee)

Other Changes on the Same Ballot

These technical updates are part of the same ballot measure. Items already covered above are noted, not repeated.

CHANGE	WHAT IT DOES
Resolution deadline (2.5)	Moves the deadline for submitting resolutions to the Board from September 30 to September 15.
Region declaration (2.6.2)	Clarifies that if a member has a main administrative office in more than one region, the member must declare which region it intends to vote and shall only vote in that region.
Regional review (2.7)	Formal review of OSBA's regions would happen at least every five years instead of every three.
Annual meeting (2.8)	Keeps the annual members' meeting but drops the requirement that it be in person in November. OSBA would still report on its activities and finances at least once a year.
Quorum and approval (2.13, 2.14)	Blank ballots and abstentions would count toward quorum but would not count as "no" votes.
Board vacancies (3.6)	Clarifies that the Board would be able to fill any vacant director seat by appointment, except an extra seat created under Sec. 3.5.1(e) when the president or immediate past president is no longer from that region.
Contiguous regions (3.6)	Ends the option of appointing a director from a neighboring region. Directors would have to come from the region they represent.
Finance Committee term limits (4.1.2)	Members starting on or after January 1, 2027, would be able to serve five consecutive two-year terms, then return after a two-year break. Current members would not be affected.
Officer reelection (5.4)	Clarifies that an officer (other than the past president) whose Board seat is up for election would have to be reelected by their region to remain an officer.
Also on the ballot	Caucus director transition (3.5.3) and Finance Committee Council designee (4.1.2): see Change 3. LPC terms (4.1.3(f)): see Change 4.

Improvements Already Underway (No Vote Needed)

These improvements fall within the Board's and staff's existing authority. Several are already in progress.

AREA	WHAT IS CHANGING
Onboarding	Written role descriptions at recruitment, mentoring for new directors, and a check-in at six to eight months.
Board and LPC expectations	Written attendance and engagement expectations and a way to track them, applying equally to regional and Caucus Council directors.
Regional director role	Clarifies that regional directors are a point of contact for member boards, not their delegates, and owe their primary duty to the association as a whole as its fiduciaries.
Governance training	Ongoing training on Board, staff, and officer roles, fiduciary duty, and officer eligibility.
Member communication	Clear ownership of member communication, a regular governance digest and legislative updates, and roadshows redesigned for two-way dialogue.
Meetings	In-person sessions for complex decisions and more emphasis on preparation before meetings.

Timeline

June 2026	Coraggio Group delivered governance review report
August 3, 2026	Governance Committee design retreat
August 24, 2026	Governance Committee recommended bylaws amendments
September 19, 2026	Board adopted resolution and referred it to members
2026 election cycle	Member vote Oct. 15 – Dec. 15
January 1, 2027	New Finance Committee term limits apply to incoming members
July 1, 2027	New caucus and Caucus Council structure takes effect
By December 31, 2027	Caucus Council directors seated on the Board
One year after implementation	Governance Committee reviews impact

Resolution to Amend the 2024 OSBA Bylaws

WHEREAS, the Oregon School Boards Association (OSBA) was formed in 1946 as a volunteer association of locally elected public school boards;

WHEREAS, in 2017, through a vote of the OSBA membership, OSBA was incorporated under ORS chapter 65 as a public benefit non-profit corporation and the OSBA bylaws replaced the OSBA constitution;

WHEREAS, in 2018, through a vote of the OSBA membership, the OSBA bylaws were amended to expand the OSBA board of directors and legislative policy committee with representatives from the Oregon school board members of color caucus;

WHEREAS, in 2023, through a vote of the OSBA membership, the OSBA bylaws were amended to expand the OSBA board of directors and legislative policy committee with representatives from the Oregon rural school board members caucus and additional revisions to the bylaws;

WHEREAS, in 2024, through a vote of the OSBA membership, the OSBA bylaws were amended to include the following substantive changes:

- Allowing caucuses to have an additional director on the OSBA board of directors in the circumstance where the OSBA president or immediate president is a director from a caucus. This revision is intended to provide the same opportunity for representation for caucuses as is currently provided to regionally elected directors.
- Clarify that OSBA board of directors must comply with the Oregon government ethics laws with respect to conflicts-of-interest.
- Require OSBA caucuses to submit an annual year end fiscal report to the OSBA board of directors.
- Create officer eligibility criteria that requires candidates for officer positions and directors in officer positions to be voting members of the OSBA board of directors.
- Edits to grammar, punctuation, and language for readability.

WHEREAS, in 2026, the OSBA board reviewed its governing structure as per Bylaws 2.7 and proposes to amend the OSBA bylaws as reflected in the attached draft OSBA bylaws with changes highlighted in the attached summary document; and

WHEREAS, the substantive changes to the draft OSBA bylaws are the following:

- Change deadline for members or board directors to submit resolutions to the OSBA board from September 30 to September 15.
- Clarify that if a member has a main administrative office in more than one region, the member board must declare which region it intends to vote and shall vote only in that region.
- Change the requirement of an in-person annual meeting of the members in November to a requirement that the annual meeting be held on a date and time and in a manner fixed by the board of directors and stated in the notice of the meeting.

- Clarify that returned blank ballots will count towards establishing a quorum but will not count as a “yes” or “no” vote.
- Replace the current caucus structure with a Caucus Council composed of designated representatives from caucuses that report to the OSBA executive director. The Caucus Council will retain two director seats on the OSBA board, replacing the two current caucus seats. The current two caucus directors will remain in their seats until the Caucus Council designates their first positions, or until December 31, 2027, whichever occurs first. The Caucus Council will have the option of designating a representative to serve on the finance committee. The Caucus Council will have the option of recommending seats on the OSBA legislative policy committee.
- Eliminate ex-officio positions and replace them with the option of appointment of nonvoting advisors to the board of directors as determined by resolution of the board of directors.
- Allow the OSBA board of directors the option of appointing directors to all vacant director positions except for the additional directors created pursuant to Section 3.5.1(e) if the president or immediate past president is no longer from the region to which the position is assigned.
- Eliminate the ability to appoint a director from a contiguous region.
- Add term limits to the finance and legislative policy committee positions.
- Clarify that OSBA officers, other than the past-president, must be reelected by their regions to continue serving as OSBA officers.
- Change OSBA board director participation on the legislative policy committee from a requirement to optional participation except that executive committee members continue to be required to serve on the LPC.

THEREFORE, BE IT RESOLVED by the OSBA board of directors that the proposed draft OSBA bylaws be submitted to the membership for consideration during the 2026 OSBA election; and

BE IT FURTHER RESOLVED that the proposed draft OSBA bylaws, the draft OSBA bylaws summary document, and a copy of this resolution be forwarded to all OSBA member boards in accordance with the OSBA board of directors’ adopted elections calendar.

Submitted by: OSBA Board of Directors



BYLAWS

As Amended by the Membership: December 2024
Proposed Edits: September 19, 2026

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SECTION 1 PURPOSE

The Oregon School Boards Association (the "Association" or "OSBA") exists solely to perform essential governmental functions and all of its income accrues to the State of Oregon or its political subdivisions as required under IRC Section 115. In particular, the Association's mission and purpose are as follows:

A. To work for the general advancement and improvement of the education of all public school children of the State of Oregon.

B. To gather and disseminate information pertinent to the successful operation of public schools.

C. To work for the most efficient and effective organization of public schools of this state. "Public schools" include local school districts, education service districts, the State Board of Education, and community colleges classified as a political subdivision.

D. To work for adequate and dependable financial support for the public schools of this state.

E. To study all legislation which affects the public schools of Oregon and to support and work for that which appears to be desirable and to keep members informed thereof. To propose and work for the enactment of proper educational legislation.

F. To encourage the establishment and maintenance of best practices and high standards in the conduct and operation of the public school educational system.

G. To study and interpret educational programs and to relate them to the needs of pupils.

H. To promote public understanding of the role of school boards and school board members in the improvement of education.

I. To conduct seminars, conferences, and research projects in the various aspects of education for the benefit of members.

J. To endeavor to implement the policies, beliefs, and resolutions of the Association members and board of directors.

K. To do such other things as the member boards or board of directors may deem appropriate for the accomplishment of these and other purposes which tend to improve public education.

L. To enter into such cooperative agreement with members for the pooling of resources and the provision of services as may result in the more efficient utilization of district resources and accrue to their financial advantage.

SECTION 2 MEMBERS

2.1 Admission. All members must qualify as (1) a "political subdivision" as defined under Treas Reg § 1.103-1(b) and Revenue Ruling 78-276, 1978-2 CB 256 and (2) as one of the following:

2.1.1 School District as defined under ORS Chapter 332;
2.1.2 Education Service District as defined under ORS Chapter 334;
2.1.3 Community College District as defined under ORS Chapter 341;
2.1.4 State Board of Education as defined under ORS Chapter 326; and
2.1.5 Any other governmental educational organization qualifying as a political subdivision, as approved by resolution of the board of directors.

2.2 Dues. Annual dues shall be set by majority vote of the members and shall be based on resident Average Daily Membership (ADMr) as of December 31 of the preceding year as reported to the Oregon Department of Education. Dues shall be payable on July 1 of each year and shall become delinquent on September 1 of each year. Member status shall automatically terminate for members failing to pay dues by September 1 unless an extension is requested and granted by the board of directors.

2.3 Reserved Powers of the Members. The following corporate actions require the consent and approval of the members:

2.3.1 Election and removal of directors except as set forth in Section 3.8;
2.3.2 Election and removal of the Legislative Policy Committee ("LPC") members except as set forth in Section 4.1.3(g);
2.3.3 Approval of resolutions to effectuate any of the following:

(a) Adoption, amendment, or restatement of the articles of incorporation or bylaws;
(b) Modification to the region descriptions set forth in Section 2.6.1; and
(c) Dissolution, merger, or the sale, pledge, or transfer of all or substantially all of the Association's assets.

2.4 Voting Power.

2.4.1 Election of Directors and LPC Members. For the purposes of nominating and electing directors and LPC members, each member shall have one vote.
2.4.2 Resolution. For the purposes of approving a resolution, each member shall have one vote on all resolutions except as follows:

(a) K-12 Local Districts with an ADMr between 15,600 and 23,400 shall have two votes.
(b) K-12 Local Districts with an ADMr between 23,400.1 and 31,200 shall have three votes.
(c) K-12 Local Districts with an ADMr between 31,200.1 and 39,000 shall have four votes.
(d) K-12 Local Districts with an ADMr of 39,000.1 or more shall have five votes.

2.5 Process of Approval of Member Resolutions. Generally, members shall approve resolutions annually by ballot vote. Members or the board of directors may submit a resolution for member approval. Such resolutions shall be submitted to the board of directors no later than September ~~30~~15. The board of directors shall distribute all timely submitted resolutions, together with an official ballot, to the members no later than October 15. Members shall vote by ballot submitted to the board of directors no later than December 15.

2.6 Regional Election of Directors and LPC Members.

2.6.1 Regional Voting. For the purposes of nominating and electing the board of directors and LPC members, the Association members shall be organized into and represented by region:

(a) Eastern Region includes all of the members located in the counties of Baker, Grant, Malheur, Union, Wallowa, and Wheeler.
(b) Gorge Region includes all of the members located in the counties of Gilliam, Morrow, Sherman, Umatilla, and Wasco.
(c) Central Region includes all of the members located in the counties of Crook, Deschutes, and Jefferson.
(d) Southeast Region includes all of the members located in the counties of Harney, Klamath, and Lake.
(e) Southern Region includes all of the members located in the counties of Jackson and Josephine.
(f) Lane Region includes all of the members located in the county of Lane.
(g) Clackamas Region includes all of the members located in the counties of Clackamas and Hood River.
(h) Douglas/South Coast Region includes all of the members located in the counties of Coos, Curry, and Douglas.
(i) Linn, Benton, Lincoln Region includes all of the members located in the counties of Benton, Lincoln, and Linn.
(j) Marion Region includes all of the members located in the county of Marion.
(k) Yamhill, Polk Region includes all of the members located in the counties of Polk and Yamhill.
(l) North Coast Region includes all of the members located in the counties of Clatsop, Columbia, and Tillamook.
(m) Washington Region includes all of the members located in the county of Washington.
(n) Multnomah Region includes all of the members located in the county of Multnomah.

2.6.2 Members shall be assigned to the region in which their main administrative office is located. If a member~~'s district boundaries span~~ has a main administrative office in more than one region, the member board must declare which region it intends to vote and shall vote only in that region.

2.6.3 Regional elections shall be determined by a majority of votes cast by members within the region.

2.7 Modification of Regions. A formal review of the regional organizations described in Section 2.6.1 shall be conducted by the board of directors at least every ~~three~~five years commencing with 2017. Any recommended changes to the regional organization shall be submitted to the members in the form of a resolution in accordance with the provisions of Section 2.5.

2.8 Annual Meetings. ~~An annual meeting of members shall be held in November of each year unless a different date or time is fixed by the board of directors and stated in the notice of the meeting. Failure to hold an annual meeting on the stated date shall not affect the validity of any corporate action. At the annual meeting,~~ An annual meeting of members will be held each calendar year on a date and time and in a manner fixed by the board of directors and stated in the notice of the meeting. At the annual meeting, the president and secretary-treasurer of the board of directors

and any other officer or person whom the president may designate, shall report on the state of the Association, its activities, and its financial condition.

2.9 **Special Meetings.** A special meeting of members shall be held upon the call of the president or 25 percent of the board of directors. All members shall be officially notified of a special meeting by written notice, mailed via U.S. mail or electronic mail, to all members at least 15 days prior to the date of the meeting. Such notice shall include a description of all agenda items and any matters to be voted upon by the members, the place and time of the meeting, and instructions describing the method by which members can participate by telephone or video. Notice shall also comply with all procedures and include any information as required by ORS Chapter 192.

2.10 **Telephonic/Video Meetings.** The board of directors may permit any member to participate in any annual or special meeting of the membership, or conduct the meetings through the use of any means of communication by which all persons participating may simultaneously hear each other during the meeting. A member participating in the meeting by this means is deemed to be present at the meeting.

2.11 **Place of Meetings.** Meetings of the members shall be held at any place, in Oregon, designated by the board of directors. If a meeting place is not designated by the board of directors, the meeting shall be held at the Association's principal office.

2.12 **Action by Written Ballot.** Any action required of the members will be taken by written ballot, and the Association will deliver a written ballot to every member entitled to vote on the matter. Once delivered, a written ballot may not be revoked.

2.13 **Quorum.** A quorum of the members shall consist of a majority of members in good standing at the time the ballots are to be returned to the A~~a~~ssociation. If there is more than one item on a single ballot, the returned ballot will count towards establishing a quorum for each item on the ballot. A blank ballot or a ballot with an abstention counts for purposes of establishing a quorum if it is returned to the association.

2.14 **Approval.** With the exception of approving amendments to the Association's bylaws as outlined in Section 8.1, and with the exception of regional elections outlined in 2.6.3, approval of an item by written ballot is effective at the end of the voting period when:

(a) T~~he number of votes cast by ballot equals or exceeds a quorum of the members~~ A quorum is established pursuant to Section 2.13; and

(b) The number of ~~approvals equals or exceeds a majority of the number of returned ballots~~"yes" votes exceeds the number of "no" votes for the item.

An abstention or a blank ballot returned to the association does not count as a "yes" or "no" vote.

SECTION 3 DIRECTORS

3.1 **Powers.** Except as provided under Section 2.3, all corporate powers shall be exercised by or under the authority of the board of directors. The board of directors shall adopt policies defining specific obligations of the board of directors.

3.2 **Qualifications.** Directors must serve on the board of a member of the Association throughout the duration of their term, with the exception of the director serving as past president.

3.3 **Number.** The board of directors shall consist of not fewer than three nor more than 25 persons. The number of directors may be fixed or changed periodically, within the minimum and maximum, by the members.

3.4 **Term.** Directors shall take office on January 1 and shall serve for a term of two calendar years or until their successors are elected and qualified. Terms shall be staggered as per the election calendar.

3.4.1 Directors who took office prior to January 1, 2018, and are re-elected may serve for any number of terms as long as they continuously remain members of the board of directors.
3.4.2 Directors taking office on or after January 1, 2018, may serve five consecutive two-year terms and, if eligible, may rerun after a two-year hiatus.
3.4.3 If a director serving as immediate past president requires additional time beyond the term limits outlined above, the term limits will be held in abeyance to allow the director to complete their term as immediate past president.

3.5 **Composition.** The board of directors will be comprised of up to 22 regionally elected directors and:

(a) Until June 30, 2027, ~~,~~ one designated director as defined in the bylaws of the Oregon School Board Members of Color Caucus, and one designated director as defined in the bylaws of the Oregon Rural School Board Members Caucus.
(b) Effective July 1, 2027, ~~and~~ two designated directors from the Caucus Council appointed pursuant to the operating procedures of the Caucus Council. Directors designated by the Oregon School Board Members of Color Caucus and the Oregon Rural School Board Members Caucus as of June 30, 2027, shall continue as directors until the Caucus Council designates its first two directors pursuant to this paragraph or until December 31, 2027, whichever occurs first.

3.5.1 Regional Elected Directors. Each region, as described under Section 2.6.1, shall elect one director except as follows:

(a) Clackamas Region shall elect two directors;
(b) Marion Region shall elect two directors;
(c) Washington Region shall elect three directors; and
(d) Multnomah Region shall elect three directors.
(e) If the president or immediate past president of the board of directors is a representative director from a region that elects only one director, that region shall elect an additional director or directors to serve for the duration of the president and/or the immediate past president's term.

3.5.2 Regional Election.

(a) The nomination and election of directors shall be in accordance with the elections calendar annually adopted by the board. The board of directors shall distribute notice

of position vacancies, candidate information packets, and official nomination forms to all incumbent directors and members in electing regions.

(b) Each regional candidate for a director position shall be nominated by a member within the region by means of a nomination form. To nominate a director candidate, one or more of the members in the region must timely submit to the board of directors a formal resolution or motion of the member and the completed nomination form(s). Nominations in regions where there is more than one open director position shall indicate the numbered position for which the nomination is being submitted.

(c) Each member in a region shall have one vote in the regional elections for the board of directors. The director candidate receiving a majority of the votes cast by the members within the region shall be elected.

(d) In cases where there are more than two candidates nominated for any position, and none receives a majority of the votes cast, a second regional ballot shall be required between the two candidates receiving the highest number of votes; the one receiving a majority of the votes is elected.

3.5.3 Caucus Council Representatives. In accordance with their ~~bylaws~~operating procedures, the ~~caucuses of OSBA shall~~ Caucus Council may appoint ~~a~~ up to two representatives of the Caucus Council to serve as a directors of the Association. The representatives must be an elected or appointed member of any public board of education in Oregon that is an active member in good standing with the Association. All Association bylaws and policies shall apply to the designated representative serving as the Caucus Council~~'~~ directors of the Association.

If the president or immediate past president of the board of directors is a representative director from ~~a caucus~~ the Caucus Council, then the ~~c~~Caucus Council shall elect an additional director to serve for the duration of the president and/or the immediate past president's term.

3.5.4 ~~Ex-Officio~~Advisors. The board of directors may designate ~~following individuals or their designee may serve as ex-officio,~~ nonvoting, advisors to the board of directors by resolution, for such purposes and such duration as is specified in the resolution.~~:~~

~~(a) Any director of the National School Boards Association elected from Oregon;~~
~~(b) The Executive Director of the Coalition of School Administrators;~~
~~(c) The Chair-Elect of the Oregon Association of Education Service Districts;~~
~~(f) The board president of the Oregon Community College Association;~~
~~(g) The chair of the State Board of Education; and~~
~~(h) Any other person that the board of directors may appoint.~~

~~Ex-officio a~~Advisors do not vote and do not attend executive sessions of the board of directors unless they hold a separate position that entitles them to attend executive session, or they are invited to attend by the board of directors.

~~Ex-officio a~~Advisors are not eligible for travel reimbursement from OSBA unless they hold a separate position for which travel reimbursement is provided.

3.6 **Vacancies.** In the event that any director position~~, other than the president or immediate past president serving as a second director for a region as set out in Section 3.5.1(e),~~ is vacant during the term of office, the remaining directors may appoint an interim director from the same region to serve until December 31 of the same year. Notwithstanding the foregoing, a vacated director position will not be filled if it is an additional director position created pursuant to Section 3.5.1(e) and the president or immediate past president is no longer from the region or Caucus Council position to which the position is assigned.

~~If the board of directors cannot recruit a candidate from the region, they may appoint a person from a contiguous region to serve as director representing the open region. An individual appointed as a director from a contiguous region is not eligible to serve as an officer of the board.~~

All appointed interim directors must run for regional election during the next election cycle following appointment in order to be eligible to continue service on the board of directors past December 31 of the election year. The members shall elect, using the procedures in Section 3.5.2, an interim director to serve from January 1 of the next year until the end of the remaining term.

If there is a vacancy in an OSBA ~~c~~Caucus Council-designated director position, then the ~~c~~Caucus Council shall, as set forth in Section 3.5.3, appoint a new ~~caucus~~ representative to serve the remaining term.

3.7 **Resignation.** A director may resign at any time by delivering written notice to the president or the secretary. A resignation is effective when notice is effective under ORS 65.034 unless the notice specifies a later effective date. Once delivered, a notice of resignation is irrevocable unless revocation is permitted by the board of directors.

3.8 **Removal.** A director may be removed for cause by vote of two-thirds majority of the directors. A director may be removed with or without cause by a majority vote of the members who elected the director. The board may provide guidance or adopt and amend policies regarding what types of actions the board considers to be sufficient cause for removal.

3.9 **Regular Meetings.** An annual meeting of the board of directors shall be held immediately after, and at the same place as, the annual meeting of members. The board of directors may schedule additional regular meetings to occur during a calendar year. All other meetings are special meetings.

3.10 **Special Meetings.** A special meeting of the board of directors may be called by the president or the president-elect or 20 percent of the board of directors. All directors shall be officially notified of a special meeting by written notice delivered personally, by telephone, or electronic mail at least 48 hours prior to the date of the meeting. Such notice shall include a description of all agenda items and any matters to be voted upon by the directors, the place and time of the meeting, and instructions describing the method by which directors can participate by telephone or video. No matter may be considered at a special meeting other than the matter(s) specified in the notice.

3.11 **Place of Meetings.** The board of directors may hold annual, regular, or special meetings at any location in the State of Oregon.

3.12 **Telephonic/Video Meetings.** The board of directors may conduct meetings ~~through the use of~~using any means of communication by which all persons participating may simultaneously hear each other during the meeting. A director participating in the meeting by this means is deemed to be present at the meeting.

3.13 **Notice of Meetings.** All directors shall be officially notified of a special meeting by written notice delivered ~~personally,~~ by ~~telephone or~~ electronic mail to all directors at least 48 hours prior to the date of the meeting. Such notice shall include a description of all agenda items and any matters to be voted upon by the directors, the place and time of the meeting, and instructions describing the method by which directors can participate by telephone or video. Notice of meetings shall comply with all procedures and include any information as required by ORS Chapter 192.

3.14 **Waiver of Notice.** A director may at any time waive any notice required by these bylaws. A director's attendance at or participation in a meeting waives any required notice to the director of the meeting unless the director, at the beginning of the meeting or promptly upon the director's arrival, objects to holding the meeting or transacting business at the meeting and does not thereafter vote for or assent to any action taken at the meeting. Except as provided in the preceding sentence, any waiver must be in writing, must be signed by the director entitled to the notice, must specify the meeting for which the notice is waived, and must be filed with the minutes or the corporate records.

3.15 **Quorum.** A quorum of the board of directors shall consist of a majority of the number of directors in office at the time the meeting begins.

3.16 **Voting.** If a quorum is present when a vote is taken, the affirmative vote of a majority of the directors present when the action is taken is the act of the board of directors except to the extent that the articles of incorporation, these bylaws, or applicable law require the vote of a greater number of directors.

3.17 **Presumption of Assent.** A director who is present at a meeting of the board of directors when corporate action is taken is deemed to have assented to the action taken unless:

(a) The director objects at the beginning of the meeting, or promptly upon the director's arrival, to holding the meeting or transacting the business at the meeting; and
(b) The director's dissent from the action taken is entered in the minutes of the meeting.

3.18 **Compensation.** Directors and members of committees may receive reimbursement of such expenses as may be determined by resolution or policy of the board of directors to be just and reasonable. Directors shall not otherwise be compensated for service in their capacity as directors.

3.19 **Director Conflict of Interest.** The Association shall maintain a Conflict of Interest policy, the terms of which comply with ORS 65.361 and ORS Chapter 244. The board of directors shall annually review and notify the directors of the current Conflict of Interest policy.

SECTION 4 COMMITTEES AND CAUCUS~~ES~~ COUNCIL

4.1 Standing Committees. The board of directors shall maintain the standing committees described below:

4.1.1 Executive Committee. The executive committee shall consist of the five officers of the board of directors: the president as chair and as an ex-officio voting member pursuant to section 5.7.1 of the Bylaws, the president-elect, the vice president, the secretary-treasurer, and the immediate past president. The executive committee is delegated authority to act in place and instead of the board of directors between board meetings on all matters except those specifically reserved to the board under the terms of the bylaws. Actions of the executive committee shall be reported to the board of directors on a timeframe consistent with the seriousness and urgency of the matter and within two weeks if practicable. Additionally, executive committee actions will be reported at the next regular board meeting.

4.1.2 Finance Committee. The finance committee shall be appointed by the president and shall be composed of members from Oregon public school districts, education service districts, and community colleges with boards that meet all criteria to be Association voting members. The members shall include, but are not limited to, the President as an ex-officio voting member pursuant to section 5.7.1 of the Bylaws, the Association secretary/treasurer and vice president, one trustee from the PACE board, one district business official, and one at-large board member. Additionally, the Caucus Council may recommend one Caucus Council member to serve on the Finance committee pursuant to its operating procedures.

The trustee from the PACE board is recommended by the PACE Board of trustees, appointed by the President, subject to approval by the Board, and will serve a two-year term~~, with no term limits~~. The Caucus Council designee is recommended by the Caucus Council, appointed by the President, subject to the approval by the Board, and will serve a two-year term. The district business official and the at-large board member will be recommended by OSBA staff, appointed by the President, subject to approval by the Board, will serve two-year terms.~~,~~ Finance committee members taking office prior to January 1, 2027, shall have ~~with~~ no term limits, and staggered start dates starting in January. Finance committee members taking office on or after January 1, 2027, may serve five consecutive two-year terms and, if eligible, may be re-appointed after a two-year hiatus.~~,~~ Finance committee members shall have ~~and~~ staggered start dates starting in January.

The finance committee shall operate within the corporation's investment guidelines and the Finance Committee Operating Guidelines.

4.1.3 Legislative Policy Committee. The board of directors shall maintain a Legislative Policy Committee ("LPC").

(a) Purpose. The LPC shall develop legislative policies which are recommended to and approved by the members as a resolution proposed by the board of directors and voted on by the membership in accordance with Section 2.4 and 2.5. The LPC also advises the OSBA E~~e~~xecutive D~~d~~irector and staff during legislative sessions.

(b) Composition. The LPC shall be composed of the voting members of the board of directors who choose to participate, the President as an ex-officio voting member pursuant to section 5.7.1 of the Bylaws, the executive committee members, the regional representatives elected under the procedures defined in Section 4.1.3(c) - (e),

and ~~one~~ designated voting members as defined in the operating procedures ~~bylaws~~ of the ~~Oregon School Board Members of Color Caucus and one designated voting member as defined in the bylaws of the Oregon Rural School Board Members~~ Caucus Council pursuant to its operating procedures and this section 4.1.3(b). The board of directors will determine the number of members appointed by the Caucus Council. The Caucus Council appointees are recommended by the Caucus Council, appointed by the OSBA President, subject to the approval by the board of directors, and will serve two-year terms. ~~All committee members must be elected or appointed directors of a member as defined in Section 2.1.~~ The vice president of the board of directors shall chair the LPC.

(c) Qualifications. ~~LPC representatives must serve on the board of a member of the Association throughout the duration of their term.~~ All committee members must be elected or appointed directors of a member as defined in Section 2.1 for the duration of their service on the LPC.

(d) Nomination. The board of directors shall cause the nomination form to be distributed to all members in eligible regions. To nominate a candidate to the LPC, one or more of the members in the region must timely submit to the board of directors a formal resolution or motion and the completed nomination form(s). Nominations in regions where there is more than one representative position shall indicate the numbered position for which the nomination is being submitted. The nomination and election of the LPC representatives shall be in accordance with the elections calendar adopted by the board.

(e) Election. Each member in a region shall have one vote in the regional elections for the LPC representative. The LPC candidate receiving a majority of the votes cast by the members within the region shall be elected. Each region shall elect the number of LPC members as described in Section 3.5, without regard to Section 3.5.1(e). Such elections shall be held using the procedures described in Section 3.5.2.

(f) Term. Each committee member shall take office on January 1 in even numbered years and serve for a term of two years. Committee members may serve five consecutive two-year terms, and, if eligible, may be returned to the committee after a two-year hiatus.

~~(f)~~(g) Vacancies. In the event that there is a vacancy on the LPC, the board of directors may appoint an interim LPC member from the same region to fill the unexpired term of office. If the board of directors cannot recruit an LPC member from the region, they may appoint a person from a contiguous region to serve to represent the open region to fill the unexpired term of office.

4.2 Other Board Committees. The board of directors may create one or more committees of the board of directors and appoint directors and representatives of members to serve on such committee. The creation of a committee and the appointment of directors and member representatives to the committee must be approved by a majority of all directors in office when the action is taken. The provisions of these bylaws governing meetings, action without meetings, notice and waiver of notice, and quorum and voting requirements of the board of directors shall apply to committees and their members as well. Committees of the board of directors may, to the extent specified by the board of directors, exercise the authority of the board of directors, provided that no committee of the board of directors may:

(a) Authorize distributions, provided that this restriction does not apply to payment of value for property received or services performed or payment of benefits in furtherance of the Association's purposes;
(b) Approve or recommend dissolution, merger, or the sale, pledge, or transfer of all or substantially all of the Association's assets;
(c) Elect, appoint, or remove directors or fill vacancies on the board or on any of its committees; or
(d) Adopt, amend, or repeal the articles of incorporation or bylaws.

4.3 **Advisory Committees.** The board of directors may create one or more other committees. Members of these committees need not be members or directors, but at least one director shall serve on each such committee. These committees shall have no power to act on behalf of, or to exercise the authority of, the board of directors, but may make recommendations to the board of directors.

4.4 **Caucus Councile~~s~~.** The Caucus Councile~~s~~ shall exist to enhance the work of the Association by addressing the unique needs of ~~member districts~~ school board members.

4.4.1 The Caucus Councile~~s~~ shall clearly articulate the vision, mission, and goals of the ~~Caucus~~Council.
4.4.2 The Caucus Councile~~s~~ shall adopt operating procedures ~~bylaws~~ for operating, programming, and governing within the context of the Association bylaws described herein.
4.4.3 The Caucus Councile~~s~~ shall comply with Association policies and guidelines.
4.4.4 The Caucus Council shall consist of one representative from each caucus established by the OSBA Executive Director. The OSBA Executive Director will establish caucuses based on criteria established by the OSBA Executive Director in support of OSBA's vision, mission, and goals. Each established caucus may recommend one member to serve on the Caucus Council subject to approval of the OSBA board of directors.~~es shall be added or eliminated to this provision through the bylaw's amendment process described in Section 8.1~~.
4.4.5 The Caucus Council budget shall be established by the board of directors.
4.4.6~~5~~ The Caucus Councile~~s~~ shall submit an end of fiscal year report to the board of directors that includes the following:

~~(a) The Caucus is meeting regularly;~~
(b) An accounting of the prior year's budget allocation;
(c) Identified officers and current ~~bylaws~~operating procedures;
(d) A summary of the Caucus Council's current goals, the prior year's Caucus Council activities that support those goals, and how the Caucus Council goals align with the mission, vision, and goals of OSBA.

The end of fiscal year report will be submitted to the board of directors at the first regularly scheduled board of directors meeting following the end of the fiscal year.

4.4.6 ~~The Oregon School Board Members of Color Caucus was established by a vote of the membership in 2018.~~
~~4.4.7 The Oregon Rural School Board Members Caucus was established by a vote of the membership in 2023.~~ The Caucus Council was established by a vote of the membership in 2026, effective ~~and shall take effect on~~ July 1, 2027.

4.5 **Administration.** Each committee and the ~~c~~Caucus Council shall prepare minutes of each of its meetings, and such minutes shall be kept on file at the Association's principal office and made available on request to any member of the board of directors. Each committee and the C~~c~~aucus Council shall also report on its activities at the regular meetings of the board of directors. Each committee and the C~~c~~aucus Council shall comply with the public meetings laws requirements ~~under~~ of ORS Chapter 192.

SECTION 5 OFFICERS OF THE BOARD OF DIRECTORS

5.1 **Eligibility.** Effective January 1, 2026, to hold an officer position on the board of directors other than the immediate past president, candidates and officers must be a voting member of the OSBA Board of Directors.

5.2 **Appointment.** The board of directors shall elect officers by majority vote prior to the November member meeting. In cases where there are more than two candidates nominated for any position, and none receives a majority of the votes, a second ballot shall be required between the two candidates receiving the highest number of votes. The one receiving a majority of the votes is elected.

5.3 **Designation.** The officers of the Association shall be a president, president-elect, past president, vice president, a secretary-treasurer, and such other officers as the board of directors may appoint.

5.4 **Term of Office.** Officer terms are one calendar year. No officer, except the secretary-treasurer, shall serve two consecutive terms in the same office, unless the director completes the term of another officer who was unable to complete their term, and is then voted into the same position the following year. The secretary-treasurer may serve up to two consecutive one-year terms. If an officer's position on the board is up for reelection by their region or redesignation by the Caucus Council, the officer must be reelected by their region or redesignated by the Caucus Council to continue serving in their officer position unless the officer position is the immediate past president. ~~Caucus Council directors serving in officer positions must continue to be recommended by the Caucus Council in accordance with their operating procedures.~~

5.5 **Compensation.** Officers may receive reimbursement of such expenses as may be determined by resolution of the board of directors to be just and reasonable. Officers shall not otherwise be compensated for service in their capacity as officers.

5.6 **Removal and Resignation.** Any officer may be removed, either with or without cause, at any time by action of the board of directors. An officer may resign at any time by delivering notice to the board of directors, the president, or the secretary-treasurer. A resignation is effective when the notice is effective under ORS 65.034 unless the notice specifies a later effective date. If a resignation is made effective at a later date and the Association accepts the later effective date, the board of directors may fill the pending vacancy before the effective date if the board of directors provides that the successor does not take office until the effective date. Once delivered, a notice of resignation is irrevocable unless revocation is permitted by the board of directors. No removal or resignation shall prejudice the rights of any party under a contract of employment.

5.7 **Officers.** The officers of the Association are as follows:

5.7.1 President: The president shall preside at all member meetings of the Association and of the board of directors; shall appoint any committee positions not otherwise designated in these bylaws or OSBA adopted policy, subject to the approval of the board of directors; shall call all regular and special meetings as provided herein; shall be an ex-officio voting member of all committees established under sections 4.1 and 4.2 of these bylaws. The president shall automatically serve as immediate past president for the following term. The president serves for a term of one calendar year.

5.7.2 President-elect: In the absence of the president, the president-elect shall assume the powers and duties of the president, and when a vacancy occurs in the office of president, shall serve in that capacity for the remainder of the term. The president-elect shall automatically serve as president for the following term, even if required to fill an uncompleted term as president. In addition, the president-elect shall assume duties related to the oversight of Association member elections and resolutions processes and such other administrative duties as are assigned by the president. The president-elect serves for a term of one calendar year.

5.7.3 Vice president: In the absence of the president-elect, the vice president shall assume the powers and duties of the president-elect. The vice president shall also serve as the chair of the LPC. The vice president serves for one calendar year.

5.7.4 Secretary-treasurer: The secretary-treasurer shall be responsible for keeping accurate minutes of all board of director meetings in electronic format in accordance with OSBA's record retention schedule; shall carry on official correspondence of the Association; shall arrange for proper banking facilities; shall receive, account for, and disburse funds in a businesslike manner as provided for by the board of directors; shall see that the minutes of the previous meetings are approved by the board of directors; and shall give an itemized and detailed report of the financial condition of the Association at each annual meeting and at such other times as may be required by the board of directors. Such duties of the secretary-treasurer as may be specified by the board of directors may be delegated to the OSBA E~~e~~xecutive D~~d~~irector or a designated member of the staff. The secretary-treasurer serves for a term of one calendar year.

5.7.5 Immediate past president: The immediate past president shall advise and counsel other officers. The immediate past president chairs the officer succession planning process. The past president serves for one calendar year.

SECTION 6 NONDISCRIMINATION

The Association shall not discriminate in providing services, hiring employees, or otherwise, upon the basis of gender identity, race, creed, marital status, sex, sexual orientation, religion, color, age, disability, or national origin.

SECTION 7 OSBA PROPERTY AND CASUALTY FOR EDUCATION TRUST

The board of directors shall appoint the trustees of the OSBA Property and Casualty Coverage for Education Trust ("PACE") as provided in the PACE Restated Trust Agreement. It is the policy of OSBA with respect to PACE trustees taking office on or after January 1, 2023, that such trustees will be appointed to no more than three consecutive three-year terms and, if eligible, may return after a one-year hiatus.

SECTION 8 GENERAL PROVISIONS

8.1 Amendment of Bylaws.

8.1.1 Amendments to the bylaws may be initiated by the board of directors or submitted by a member to the board of directors.

8.1.2 The board of directors shall provide written notice to the members containing a statement that the members will be asked to approve the amendment and a copy of the proposed amended bylaws.

8.1.3 Action by Written Ballot: The Association will deliver a written ballot to every member entitled to vote on the matter. The ballot shall set forth each proposed action and provide an opportunity to vote for or against each proposed action and specify a reasonable time by which a ballot must be received by the Association in order to be counted. Once delivered, a ballot may not be revoked.

8.1.4 Approval: Approval by written ballot shall be valid only when the number of votes cast by ballot equals or exceeds a quorum of the members, and the number of approvals equals or exceeds two-thirds majority of the number of the returned ballots.

8.1.5 Quorum: A quorum of the members shall consist of a majority of members in good standing at the time the ballots are to be returned to the Association.

8.1.6 Whenever an amendment or new bylaw is adopted, it shall be saved in electronic format in accordance with OSBA's record retention schedule with the original bylaws in the appropriate place. If any bylaw is repealed, the fact of repeal and the date on which the repeal occurred shall be stated in such book and place.

8.2 Inspection of Books and Records. All books, records, and accounts of the Association shall be open to inspection by the directors in the manner and to the extent required by law.

8.3 Checks, Drafts, Etc. All checks, drafts, and other orders for payment of money, notes, or other evidences of indebtedness issued in the name of or payable to the Association shall be signed or endorsed by such person or persons and in such manner as shall be determined by resolution of the board of directors.

8.4 Deposits. All funds of the Association not otherwise employed shall be deposited to the credit of the Association in those banks, trust companies, or other depositories as the board of directors or officers of the Association designated by the board of directors select, or be invested as authorized by the board of directors.

8.5 Loans or Guarantees. The Association shall not borrow money and no evidence of indebtedness shall be issued in its name unless authorized by the board of directors. This authority may be general or confined to specific instances. Except as explicitly permitted by ORS 65.364, the Association shall not make a loan, guarantee an obligation, or modify a pre-existing loan or guarantee to or for the benefit of a director or officer of the Association.

8.6 Execution of Documents. The board of directors may, except as otherwise provided in these bylaws, authorize any officer or agent to enter into any contract or execute any instrument in the name of and on behalf of the Association. Such authority may be general or confined to specific instances. Unless so authorized by the board of directors, no officer, agent, or employee shall have any power

or authority to bind the Association by any contract or engagement, or to pledge its credit, or to render it liable for any purpose or for any amount.

8.7 Insurance. The Association may purchase and maintain insurance on behalf of an individual against liability asserted against or incurred by the individual who is or was a director, officer, employee, or agent of the Association, or who, while a director, officer, employee, or agent of the Association, is or was serving at the request of the Association as a director, officer, partner, trustee, employee, or agent of another foreign or domestic business or nonprofit corporation, partnership, joint venture, trust, employee benefit plan, or other enterprise; provided, however, that the Association may not purchase or maintain such insurance to indemnify any director, officer, or agent of the Association in connection with any proceeding charging improper personal benefit to the director, officer, or agent in which the director, officer, or agent was adjudged liable on the basis that personal benefit was improperly received by the director, officer, or agent.

8.8 Fiscal Year. The fiscal year of the Association shall begin on the first day of July and end on the last day of June in each year.

8.9 Severability. A determination that any provision of these bylaws is for any reason inapplicable, invalid, illegal, or otherwise ineffective shall not affect or invalidate any other provision of these bylaws.

* * * * *

The foregoing bylaws were approved by the membership of the Oregon School Boards Association on December 15, 2024. The original bylaws were duly adopted by the Board of Directors of OSBA on September 15, 2017, and approved by the membership on December 15, 2017, then amended and adopted on December 14, 2018; December 15, 2023; December 15, 2024.

ITEM FOR ACTION AT A FUTURE MEETING

APPROVE REVISIONS TO BOARD POLICIES BBAA and BBE

SUMMARY
Revisions are recommended to update school board policies BBAA and BBE. Changes were generated by the Oregon School Boards Association, which provides policy recommendations to reflect changes in state statutes and/or regulations and best practices, and integrated and recommended by staff.

POLICY DRAFT KEY

Blue Underlined	Recommended language additions or changes
~~Red Strikethrough~~	Removed outdated language
Black Italicized	Existing language moved within policy

BACKGROUND

BBAA – Individual Board Member's Authority and Responsibilities
Proposed revisions add language regarding specific board member responsibilities, such as requests for records, legal advice and complaints. In addition, there is new language that clarifies board member responsibilities, including required public meetings and ethics training/compliance, mandatory reporting obligations, maintaining confidentiality, and following district policies and established procedures.

BBE – Vacancies on the Board
OSBA has updated this policy to incorporate legal requirements into a set of steps boards can follow in order to fill a board vacancy. It is proposed to delete existing policy BBE and adopt new policy BBE.

RECOMMENDATION
The proposed revisions to these policies are presented for initial consideration and will come before the board for approval at its next meeting:

- Revisions to board policy BBAA
- Deletion of existing policy BBE and adoption of new policy BBE

Beaverton School District does not discriminate in any programs or activities 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.

BEAVERTON SCHOOL DISTRICT

Code: BBAA
Adopted: 3/9/09
Readopted: 5/28/24
Orig. Code(s): BBAA

Individual Board Member's Authority and Responsibilities

An individual board member exercises the authority and responsibility of their position when the board is in a meeting which is being held in accordance with Oregon's public meetings laws ~~legally called session~~.

A board member has the authority to act in the name of the board when authorized by a specific board motion. The affirmative vote of the majority of members of the board is required to transact any business. When authorized to act as the district's designated representative in collective bargaining, a board member may make and accept proposals in bargaining subject to subsequent approval by the board.

Board members may speak on behalf of the board or district only when specifically authorized to do so. Any other statements do not represent the position of the board or district.

A board member has the right to express personal opinions. When expressing such opinions in public, the board member must clearly identify the opinions as their own. This does not preclude a board member from endorsing a candidate or measure in their capacity as an individual board member. They may not make endorsements on behalf of the board unless authorized to do so.

All board members shall maintain awareness of relevant district information and participate in board functions and professional board development activities. ~~Members will be knowledgeable of information requested through board action, supplied by the superintendent and gained through attendance at district activities and through professional board activities.~~

All members of the board will adhere to the following in carrying out the responsibilities of membership:

1. Request for ~~Information~~ Records

Any individual board member who desires a copy of an existing record ~~written report or survey prepared by the administrative staff will~~ may make such a request to the superintendent. ~~A copy of the material may be made available to each member of the board. Requests for the generation of reports or information which requires additional expense to the district must be submitted to the board for consideration.~~ Requests involving confidential records or significant staff time will be referred to the board for approval.

2. Requests for Legal Opinions

~~A~~ Requests for ~~a~~ legal advice or opinions by a board member that will incur a cost for the district must be approved by a majority vote of the board before the request is made to legal counsel. The board chair is authorized to obtain legal advice or opinions if advantageous to do so prior to the next meeting (e.g., advice regarding an executive session or a decision to invite district legal counsel) without a need for board approval. ~~If the legal opinion sought involves the superintendent's employment or performance, the request should be made to the board chair.~~ Legal counsel is responsible to the board.

3. Action on Complaints or Requests Made to a Board Member~~s~~

When a board member~~s~~ receives complaints or requests for action from staff, students or members of the public, the board member will direct the staff, students or members of the public to the public complaint policy KL – Public Complaints. Such information is to be conveyed to the superintendent ~~for action~~. An individual board member is not authorized to independently act on complaints.

4. **Board Member's Communication with ~~Relationship to~~ Administration**

~~Individual board members will be informed about the district's educational program, may visit schools or other facilities to gain information, and may request information from the superintendent.~~ No individual board member may direct the superintendent or other staff to action without board authorization. No board member~~s~~ will ~~not~~ intervene in the administration of the district or its schools.

5. Contracts or Agreements

All contracts of the district must be approved by the board, unless otherwise delegated by the board to the superintendent or designee for approval before an order can be drawn for payment. If a contract is made without authority of the board, the individual making such contract shall be personally liable.

6. Visits to Schools

A board member may visit schools in accordance with board policy BG – Board–Staff Communications.

7. Public Meetings Law

All board members will comply with public meetings law, including participating in an approved training[1] at least once during each term of office.

8. Mandatory Reporting

A board member having reasonable cause to believe that any child with whom the board member comes in contact has suffered abuse or that any person with whom the board member comes in contact has abused a child shall immediately make an oral report or cause an oral report to be made to the Department of Human Services[2] or local law enforcement.

9. Oregon Ethics Laws

All board members will adhere to Oregon government ethics laws, including filing the statement of economic interest as required by Oregon Revised Statute (ORS) 244.

10. Confidential Information

All board members will not disclose confidential information received as part of board service.

11. Other Laws, Policies, Agreements and Procedures

All board members will follow all laws, board policies, working agreements, and any other procedures established by the district.

[1] Approved by the Oregon Government Ethics Commission
[2] (855) 503-SAFE (7233)

END OF POLICY

Legal Reference(s):
ORS 192.311 – 192.478
ORS 192.610 – 192.705
ORS Chapter 244
ORS 332.045
ORS 332.055
ORS 332.057
ORS 332.075
ORS 332.107
ORS 419B.010

38 Or. Atty. Gen. Op. 1995 (1978)
S. Benton Educ. Ass'n v. Monroe Union High Sch. Dist., 83 Or. App. 425 (1987).

Cross Reference(s):
BHD - Board Member Compensation and Expense Reimbursement

BEAVERTON SCHOOL DISTRICT

Code: BBE
Adopted: 11/15/04
Readopted: 4/24/17
Orig. Code(s): BBE

Vacancies on the Board

Vacancies will be filled through Board appointment. The Board appointee must be a legally registered voter and a resident within the district for one year immediately preceding the appointment. If the vacancy occurs in a zone, the Board shall advertise at least for a 20-day period to find an eligible resident from the same zone. If an eligible zone resident cannot be found, the Board shall appoint one of the eligible residents from the district. Board elections are held every odd-numbered year which for the purposes of this policy are termed "election" years.

The appointee will:

1. Serve until June 30 following the next "election" at which time the individual elected in May of that year will fill the remaining portion of an unexpired term or serve a full four-year term; or

2. Serve until June 30 of a subsequent "election" year if the vacancy occurs after the filing date in an "election" year.

A Board member, so elected as a replacement, will serve the remainder of the term of office of the Board member being replaced.

Upon appointment by the Board, the newly appointed Board member(s) will be sworn and seated immediately.

If the offices of a majority of Board members are vacant at the same time, the directors of the Northwest Regional Education Service District shall appoint persons to fill the vacancies from qualified school district voters.

END OF POLICY

Legal Reference(s):
ORS 249.865 to -249.877
ORS 255.245
ORS 255.335
ORS 332.030
ORS 332.122
ORS 332.124

Cross Reference(s):
BBBA - Board Member Qualifications
BBD - Board Member Removal from Office

DELETE

BEAVERTON SCHOOL DISTRICT

Code: BBE
Adopted: 11/15/04
Readopted: 4/24/17
Orig. Code(s): BBE

Vacancies on the Board

Vacancies on the board will be filled through the following procedures:

1. At a board meeting, the board will declare the vacancy.[1]

2. The board or designee will establish an application period of at least 20 days. Applicants will be required to submit an application to the district office by the designated date. Deadlines and instructions will be posted on the district website. The board can vote to extend or re-open the application period at any time.

3. After the application period has ended, the superintendent or designee will verify applicant eligibility. Applicants must:
   a. Be an elector of the district.[2] This requires being registered to vote within the district;
   b. Have resided in the district for a period of one year immediately preceding the appointment;
   c. Be a resident of the zone of the vacant position;
   d. Not be an employee of the district or a charter school located within the district.

4. The board will review applicant materials in an open board meeting.

5. The board may select applicants to interview. Any interview will be held in an open board meeting.

6. During an open board meeting, the board will vote to appoint one of the applicants. In the event that no applicant receives a majority of votes,[3] the board may re-vote or vote to re-open the application period.

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[1] In accordance with ORS 332.030, the board shall declare a vacancy upon any of the following:
1. The death or resignation of any board member;
2. When a board member is removed from office or the election of the board member has been declared void by the judgment of any court;
3. When a board member ceases to be a resident of the district or the zone from which they were nominated (see exception for board members who move out of the zone, but remain residents of the district in ORS 332.030(2) - (3));
4. When a board member ceases to discharge the duties of office for two consecutive months unless prevented by sickness or other unavoidable cause;
5. When a board member ceases to discharge the duties of office for four consecutive months for any reason; or
6. When a board member is recalled.

[2] ORS 254.005(4) provides "'Elector' means an individual qualified to vote under section 2, Article II, Oregon Constitution." District staff may verify this with local elections officials.

[3] ORS 332.055 requires the affirmative vote of a majority of board members to transact any business. Consequently four votes are necessary to appoint a board member, regardless of how many vacancies exist.

7. The newly appointed board member will take an oath of office before assuming the duties of office and will be seated immediately thereafter.

If the vacancy occurs in a zone and an eligible zone resident cannot be found, the board shall appoint one of the eligible residents from the district to serve in accordance with ORS 332.124.

The appointee will serve until June 30 following the next election. At that election, either the remainder of the term for the position, or a full term for the position, will be on the ballot.

If the offices of a majority of board members are vacant at the same time, the directors of the Northwest Regional Education Service District shall appoint persons to fill the vacancies from qualified individuals.

END OF POLICY

Legal Reference(s):

ORS 249.865 - 249.877
ORS 254.005
ORS 255.245
ORS 255.335
ORS 332.030
ORS 332.122
ORS 332.124