



2026-27 BOARD & STAFF

Board Chair, Mackenzie Strawn **Board Vice-Chair,** Alisha Oliver
Board Members: Mike Wagner, Erin Cramer, Mark Henderson, Coral Ford & Brunk Conley
Student Representatives to the Board, Amalia Bell & Aliya Maciel
Superintendent, Lee W. Loving
Director of Business & Fiscal Services, Rhonda Allen
Director of Human Resources, Danielle Blackwell
Director of Teaching & Learning, Nicole Duncan
Director of Special Programs, Melissa Glover
Director of Ancillary Services, John Barnes
Director of Operations & Facilities, Travis King
Superintendent/School Board Executive Assistant, Tonia Whisman

*Access to the agenda and meeting materials can be located on the District website at
www.nssd29j.org > [Board of Directors](#) > [Agendas/Meeting Minutes](#)*

NSSD Board of Directors Regular Session
Thursday, October 15, 2026 ~ 6:00 PM
NSSD District Office/Santiam Room, 1155 N 3rd Ave, Stayton, OR 97383
<https://youtube.com/live/PLEUfnU63p8?feature=share>

1. CALL REGULAR SESSION TO ORDER

6:00 pm (times for agenda items are estimated)

2. AGENDA APPROVAL

Changes to the agenda after posting on October 9, 2026 will be acknowledged:

Added Agenda Item/Attachment-

8.1-Pension Bond Resolution #101526A

RECOMMENDED MOTION-AGENDA APPROVAL

I move that the Board approve the agenda as modified.

3. APPROVAL OF MEETING MINUTES

RECOMMENDED MOTION-MINUTES APPROVAL

I move that the Board approve the 09.17.2026 meeting minutes as [presented] [modified].

09.17.26 minutes-DRAFT

4. STUDENT BUSINESS: Amalia Bell/Aliya Maciel

6:05 pm

5

5

5. CITY COUNCIL LIAISON REPORTS:

6:10 pm

This standing agenda item is for reports from the Stayton, Sublimity and Lyons City Council Liaisons.

6. DISTRICT DESIGN GOALS

6:15 pm

7. TEACHING & LEARNING REPORT: Nicole Duncan

7:15 pm

10

October 2026 Teaching & Learning Board Report

10

7.1. Division 22 Assurances Report

Before November 1, school districts must report compliance for the preceding school year with all state standards set forth in Oregon Administrative Rules 581-022-2305, Division 22, to their school board in an open meeting. The meeting must allow for public comment regarding the report.

7.2. Public Comment on Division 22 Report

7.3. Adoption Postponement of PE Curriculum

Recommended Motion:

I move that the Board approve the request to postpone the adoption of Physical Education instructional materials for implementation until the 2028-2029 school year.

8. BUSINESS & FISCAL SERVICES REPORT: Rhonda Allen

7:30 pm

15

Financial Board Report Sept 2026

15

Oregon PERS, What School Districts Really Pay for Pensions

29

Financial Report Presentation- Sept 2026

30

8.1. Pension Bond Resolution #101526A

49

RECOMMENDED MOTION-RES#101526A

I move that the Board authorizes NSSD's participation in the Oregon Education Districts Pension Bond Program as stipulated in Resolution #101526A.

OED 2027 Pension Bonds Resolution #101526A

49

9. SUPERINTENDENT'S REPORT: Lee W. Loving

7:40 pm

10. LICENSED/CLASSIFIED UNION REPORTS: Union Reps.

7:50 pm

11. PUBLIC COMMENT

7:55 pm

12. RECESS

8:15 pm

13. POLICY UPDATES

8:20 pm

13.1. Second Readings

79

CBG-Eval of the Superintendent (intro by Mike)

EBB-Integrated Pest Management (intro by Mackenzie)

GBA-Equal Employment Opportunity (intro by Brunk)

JHCA-Immunization, School Sports Participation, Concussions and Other Brain Injuries (intro by Erin)

CBG-Eval of the Supt 09.17.26

79

EBB-Integrated Pest Management 09.17.26

81

GBA-Equal Employment Opportunity 09.17.26

84

JHCA- Immunization, School Sports Participation, Concussions and Other Brain

86

Injuries 10.15.26

JHCA JHCB-delete current version

89

13.2. Clarification on Policy KNA-Immigration Enforcement on District Property

During the 09/17/26 meeting, the Board requested further clarification of the term "Community-based service providers" during the approval process of new policy KNA. District staff will provide the information they have collected from OSBA.

13.3. First Readings

92

GBN/JBA-Sexual Harassment-revision (intro by Alisha)

BBE-Vacancies on the Board-replacement (intro by Mark)

BDDG-Recordings and Minutes of Board Meetings-replacement (intro by Coral)

BBE-Vacancies on the Board 10.15.26

92

BBE-DELETE CURRENT Vacancies on the Board

94

BDDG-Recordings and Minutes of Board Meetings 10.15.26

96

BDDG-DELETE CURRENT Minutes of Board Meetings

98

GBN JBA-Sexual Harassment 10.15.26

100

14. BOARD REFLECTIONS/ANNOUNCEMENTS

8:50 pm

15. INFORMATION ONLY

8:55 pm

15.1. Field Trip Report

109

Oct 2026 Field Trip Report

109

15.2. Student Enrollment

112

Refer to the attachment for a breakdown by grade at each location and totals from previous months in the school year.

Mari-Linn: 169

Sublimity: 400

Stayton Elementary: 332

Stayton Intermediate/Middle: 453
Stayton High: 628
Locust Street Academy: 32
Stayton Virtual Academy: 39
Total: 2053 (2085 including PreK)

Oct 2026 Enrollment Totals

112

15.3. Future Agenda Items

114

Agenda Items Annual Calendar rev 09.26

114

15.4. Upcoming Board Events & Activities

October 22, 2026: Stayton Elementary Literacy Night
5:45-7:00 pm

October 22, 2026: Facilities Tour of Stayton Intermediate/Middle
7:00-8:30 pm

October 29, 2026: Mari-Linn Red Ribbon Parade (8:30am) and Fall Family Carnival (5:30pm)

October 29, 2026: Facilities Tour of Stayton High
7:00-8:30 pm

November 19, 2026: Regular Session Board Meeting
6:00 pm ~ District Office/Santiam Room

December 17, 2026: Regular Session Board Meeting
6:00 pm ~ District Office/Santiam Room

16. ADJOURN

9:00 pm(estimated)

EQUAL OPPORTUNITY EMPLOYER



2026-27 Board of Directors

Board Chair, Mackenzie Strawn **Board Vice-Chair,** Alisha Oliver
Board Members: Mike Wagner, Erin Cramer, Mark Henderson, Coral Ford & Brunk Conley
Student Representatives to the Board, Amalia Bell & Aliya Maciel
Superintendent, Lee W. Loving
Director of Business & Fiscal Services, Rhonda Allen
Director of Human Resources, Danielle Blackwell
Director of Teaching & Learning, Nicole Duncan
Director of Special Programs, Melissa Glover
Director of Ancillary Services, John Barnes
Director of Operations & Facilities, Travis King
Superintendent/School Board Executive Assistant, Tonia Whisman

*Access to the agenda and meeting materials can be located on the District website at
www.nssd29j.org > [Board of Directors](#) > [Agendas/Meeting Minutes](#)*

Thursday, September 17, 2026 NSSD Board of Directors Regular Session
NSSD District Office/Santiam Room, 1155 N 3rd Ave, Stayton, OR 97383 ~ 6:00 PM

<https://youtube.com/live/gE3m9rqzLDc?feature=share>

The times listed next to agenda items reflect the timestamp during the livestream video.

MINUTES - DRAFT

1. CALL REGULAR SESSION TO ORDER

The meeting was called to order at 5:59 pm. The Board Chair acknowledged that all board members and student representatives were present and then led everyone in the Pledge of Allegiance.
(Mark Henderson attended virtually)

2. AGENDA APPROVAL

Changes to the agenda after posting on September 11, 2026, were acknowledged:

Added Attachments-

*14.0 DLC-AR1 Staff Expense Reimbursement

*16.1 Sept 2026 Field Trip Report

MOTION-AGENDA APPROVAL

I move that the Board approve the agenda as modified.

Motion Made By: Alisha Oliver

Vote: 7-0, motion passed

3. CONSENT AGENDA

3.1. *Action: Approval of Meeting Minutes* 08.20.26 minutes-DRAFT

3.2. *Action: Approval of New Hires*

New Hires

Michael Avelinno: SHS/CTE - Woods

William (Tom) Mask: SHS/CTE - Manufacturing

Resignations/Retirements are Informational Only

Refer to the attachment for more information

Sept 2026 Licensed Report

3.3. *Approval of Third-party Alternative Ed. Programs*

The list of third-party alternative education programs presented in the June 11, 2026, meeting included an error relating to vendors available at Stayton Virtual Academy. The list was resubmitted with the correction highlighted in bold text.

*Willamette Career Academy

*Chemeketa Community College (Early College & GED)

*Polk Adolescent Day Treatment Center (PADTC)

*Children's Farm Home

*Willamette Education Services District (WESD) - Phoenix School

*Meadowlark Day Treatment

*SchoolsPLP, **Pearson Connexus** (Stayton Virtual Academy)

*Oregon School for the Deaf

*Graduation Alliance (for credit recovery at SHS)

3.4. *Action: Approval of Consent Agenda*

MOTION-CONSENT AGENDA

Motion that the Board approve the Consent Agenda as presented.

Motion Made By: Alisha Oliver

Vote: 7-0, motion passed

4. STUDENT BUSINESS: Amalia Bell/Aliya Maciel (4:36)

The presentation can be viewed at the link below:

[SHS Board Presentation 2026-2027 - Google Slides](#)

5. CITY COUNCIL LIAISON REPORTS:

There were no reports from city council liaisons.

6. TEACHING & LEARNING REPORT: Nicole Duncan (9:20)

The report included the annual Integrated Guidance Annual Report. The presentation can be viewed at the link below:

[September 2026 Teaching & Learning Board Report](#)

6.1. **Public Comment on Integrated Guidance Report**

There were no comments from the public.

7. SPECIAL PROGRAMS REPORT: Melissa Glover (21:15)

The report reviewed the district's 2026 Special Education Report, which included data from the 2024-25 school year. The presentation can be viewed at the links below:

[2023-24 Report Card](#)

[2024-25 Report Card](#)

[Special Programs September 2026 - Google Slides](#)

*request from the Board for comparison data with other same-size school districts

8. FACILITIES REPORT: Travis King (53:00)

The report included a recap of projects completed during the summer. The presentation can be viewed at the link below:

[September 26 Board Report Facilities - Google Slides](#)

9. BUSINESS & FISCAL SERVICES REPORT: Rhonda Allen (1:03:00)

The statements included both actual revenues and expenditures from July 1, 2026, to June 30, 2027.

The projected General Fund Ending Fund Balance was \$2,846,160, and the Contingency and Unappropriated Ending Fund Balance equaled \$1,429,233. The presentations can be viewed at the links below.

[Financial Board Report Aug 2026](#)

[Financial Report - Aug 2026 - Google Slides](#)

10. SUPERINTENDENT'S REPORT: Lee W. Loving (1:18:45)

Key points included:

- School year start-up: Enrollment higher than projected (Projected: 2013 → Last Friday: 2053)
- 2026-27 School & Department Design Goals (Goals, Strategies, Desired Outcomes) will be presented during the October meeting
- Pre-Bond Activities
 - Informational Social Media Campaign Underway
 - Upcoming School Video Release & Tours Scheduled from October 1-29
 - Oct/Nov Presentations to community groups, including PTO/PTC/Boosters
- Introduction and welcome to two new CTE teachers- Construction/Woods (Michael Avelinno) & Manufacturing/Metals (Tom Mask), and acknowledgment of the efforts of former SHS teachers, Dale Sunderman & Rodney Weeks, who made themselves available during the transition period.
- Update: 25-26 “High Attender” percentage has been adjusted from 70% → 67%

11. LICENSED/CLASSIFIED UNION REPORTS: Union Reps. (1:37:00)

Corrie Boock was present to announce new building union reps - Yara Coblenz (ML), Sam Houck (SIMS), and John King (SUB).

12. PUBLIC COMMENT

There were no comments from the public.

The meeting was recessed from 7:37-7:45 pm.

13. POLICY UPDATES (1:46:20)

13.1. Second Readings

EI- Insurance Programs

Motion to approve policy EI as presented.

Motion Made By: Alisha Oliver

Vote: 7-0, motion passed

[EI-Insurance Programs 09.17.26](#)

KNA (new)- Immigration Enforcement on District Property

Motion to approve policy KNA as presented and to revisit the policy to clarify the requested information (see below).

Motion Made By: Brunk Conley

Vote: 7-0, motion passed

[KNA Immigration Enforcement on District Property 08.20.26](#)

*request for clarification regarding KNA as to what constitutes “community-based service providers”

13.2. First Readings (1:55:11)

CBG-Eval of the Superintendent (intro by Mike)

[CBG-Eval of the Supt 09.17.26](#)

EBB-Integrated Pest Management (intro by Mackenzie)

[EBB-Integrated Pest Management 09.17.26](#)

GBA-Equal Employment Opportunity (intro by Brunk)

[GBA - Equal Employment Opportunity 09.17.26](#)

JHCA-Immunization, School Sports Participation, Concussions and Other Brain Injuries (intro by Erin, who suggested adding the word “qualified” on page 2 (item 3) prior to the phrase “health care professional”)

[JHCA- Immunization, School Sports Participation, Concussions and Other Brain Injuries 09.17.26](#)

14. ADMINISTRATIVE REGULATION UPDATES (2:07:25)

Supt. Loving reviewed the changes to the AR.

DLC-AR1 -Staff Expense Reimbursement

[DLC-AR1 Staff Expense Reimbursement 09.17.26](#)

15. BOARD REFLECTIONS/ANNOUNCEMENTS (2:11:00)

Highlights included:

- Acknowledgment of the district enrollment number increasing from last year
- Future achievements for students on IEPs

16. INFORMATION ONLY

16.1. Field Trip Report

[Sept 2026 Field Trip Report](#)

16.2. Student Enrollment

Mari-Linn: 171

Sublimity: 402

Stayton Elementary: 330
Stayton Intermediate/Middle: 451
Stayton High: 634
Locust Street Academy: 32
Stayton Virtual Academy: 33
Total: 2053 (2083 incl. preK)
[Sept 2026 Enrollment Totals 09.11.26](#)

16.3. Future Agenda Items

[Agenda Items Annual Calendar rev 09.26](#)

*request for more information regarding outside placements (alt ed)

16.4. Upcoming Board Events & Activities

Included in meeting materials.

17. ADJOURN

The meeting was adjourned at 8:11 pm.

EQUAL OPPORTUNITY EMPLOYER



North Santiam School District 29J

Serving Lyons, Mehama, Stayton, and Sublimity

Teaching and Learning Board Report October 2026

Items for Board Approval:

Request for Physical Education Instructional Materials Adoption

ODE evaluates and adopts instructional materials on a [seven-year schedule](#). The schedule rotates content area materials for adoption from year to year. For ODE, this annual process helps to verify that quality instructional content is adopted regularly across content areas. According to Oregon Administrative Rule (OAR) 581-022-2355, a school district may postpone the implementation of state-adopted instructional materials. To do so, the district must submit a formal application to the Oregon Department of Education, with approval from the local school board.

The Department of Teaching and Learning requests postponements for Physical Education: Following the state's 2025-2026 adoption of Physical Education instructional materials for implementation in fall 2027, the Department of Teaching and Learning is now requesting a two-year postponement, which would schedule the adoption of these materials during the 2028-2029 school year for classroom implementation by fall of 2029. This revised timeline complies with the maximum two-year postponement window allowed under OAR 581-022-2355.

Action Requested: Will the Board approve the district's request to postpone the adoption of Physical Education instructional materials for implementation in the 2028-2029 school year?

Updates:

Division 22 Report

This report is part of the Division 22 Standards assurances process, which is required by statute (ORS 327.103). The assurances process is a combined local and state accountability model that acknowledges the importance of the local school board, which has broad-ranging authority under Oregon's local control model and directs reporting to ODE. Districts must report to the community at a school district board meeting and post the report on the district website. Districts must then submit assurances to ODE. For each rule, the district either certifies compliance or states it is out of compliance and proposes corrective action. Compliance with the Division 22 standards confirms that every student in an Oregon public school receives a baseline level of service that meets state standards. Not only are these standards monitored, but compliance is tied to state school funds.

As part of this process, districts must first report their compliance status to their local community. This report must be presented to the local school board in a public meeting and made available on the district's website by **November 1st**. Following this local reporting, districts submit their official assurances to the Oregon Department of Education (ODE). The Division 22 standards include 62 individual rules, which can be categorized into five broad categories: High-Quality Learning Experiences, Aligned & Focused Educational Systems, Engaged Partners & Communities, Safe & Inclusive Schools, and Committed & Supported Staff. To learn more about the specific requirements for a certain rule, the **ODE's Rules at a Glance Summary** provides a high-level summary of each rule and includes a link to the [Oregon Administrative Rules database](#).

Strategic Themes and Focus Area Alignment:

Fiscal Stewardship
Teaching and Learning

Our Data Story and SB141

Under Oregon’s Senate Bill 141 (the 2025 Education Accountability Act), public school districts must administer interim assessments three times per year in grades K–8 and regularly review student progress in public board meetings. North Santiam School District uses the Renaissance Star Assessment Suite to meet these requirements and to adjust assessments for students on different learning pathways, so they are matched to their current instructional level. This suite includes Star Early Literacy for grades K–1, Star Reading for grades 2–12, and Star Math for grades 2–12. Benchmark assessments are scheduled three times annually across our Fall, Winter, and Spring testing windows. In addition to tracking overall academic growth, Renaissance Star serves as our district’s primary dyslexia screener, allowing educators to identify early reading risk indicators long before learning gaps widen.

To maximize the impact of this tool, we are providing teachers with structured professional development and data-coaching strategies so they can interpret screener results as an actionable diagnostic map. Rather than treating screeners as a passive score, teachers learn to pinpoint the exact prerequisite skills and instructional targets individual students need next.

Because no single test tells a child's complete educational story, we are also actively investigating how to incorporate Curriculum-Based Measures (CBMs) alongside Star to track and report short-term student growth with even greater precision. As Oregon transitions toward continuous, real-time monitoring under SB 141, combining Renaissance Star with responsive classroom strategies provides our educators with clear, reliable visibility into student proficiency and progress long before end-of-year state testing.

[Our Data Story and SB141 \(Board Presentation\)](#)

Strategic Themes and Focus Area Alignment:

Teaching and Learning
Future Ready Graduates

Certified In-Service Day October 9, 2026

On October 9, 2026, district-certified staff participated in a dedicated Professional Learning Day structured around specialized learning pathways. In response to previous staff feedback, the day was reorganized to feature building-level facilitation in the morning, followed by district-wide sessions in the afternoon. Designed to advance district goals in Math and Reading while strengthening Professional Learning Communities (PLCs), PLC leads helped design and facilitate the peer-led learning. Feedback results will be presented in the November Teaching and Learning Board Report.

In the Elementary Pathway, educators worked alongside facilitator Jen Hunt, founder of New Math Minds. The morning focused on analyzing fall STAR assessment data to establish aligned math goals and differentiate instruction. In the afternoon, elementary staff shifted to strategies to enhance student math discussions and to master questioning techniques in preparation for the fall Lesson Study.

Secondary staff (Grades 6–12) spent the morning in school-wide, site-specific professional development at their respective buildings. In the afternoon, secondary teams gathered at Stayton High School for district-wide PLC breakout sessions centered on Grades 6–12 vertical articulation, curriculum overviews, and virtual collaboration with WestEd consultants.

District specialists engaged in targeted, discipline-specific professional learning throughout the day. Many attended regional conferences, including the OMEA District 4 conference for Music teachers, the OSHA conference for Speech-Language Pathologists, and the OSCA conference for Counselors. Meanwhile, specialized sessions provided dedicated learning tailored to Reading, SPED, and Behavior Specialists.



NSSD Certified Professional Learning Day | October 9, 2026

Participants will need to bring their own devices for sessions. There are few Chromebooks available.



Elementary Pathway Facilitator: Jen Hunt Location: Stayton Elementary School Cafeteria		
Time	Session Description	Session Outcomes
7:30 AM - 11:30 AM	Grade teams will look over their fall STAR data. PLC leads will help teachers investigate two specific reports to gain understanding of student understanding. Consultant will lead team discussions on differentiation of strands in need of growth. Teachers will set goals for the fall.	- Teachers will align primary and secondary math goals with the STAR data. - Teachers will learn to align unit tests with STAR data. - PLC leads will have opportunities to guide their team.
11:30 AM - 12:30 PM	LUNCH Hosted at Morning Site	
12:30 PM - 3:30 PM	In preparation for the fall Lesson Study in classrooms, teachers will receive training on increasing effective student math discussion. Additionally, the group will outline questioning strategies and learn about various question types, including their strategy, implications, and application.	- Teachers will know what talk-to-learn looks like with various engagement strategies. - Teachers will be ready to use various question types to deepen learning. - Teachers will be ready to collaborate during fall Lesson Study.
 Meet Jen – Jen Hunt is the founder and lead consultant for New Math Minds . Nearly 25 years in respective classrooms has informed her work as a math specialist. Jen works alongside teachers and administrators to strengthen math instruction in ways that are practical, sustainable, and grounded in how students actually learn.		



NSSD Certified Professional Learning Day | October 9, 2026

Participants will need to bring their own devices for sessions. There are few Chromebooks available.



Secondary Pathway			
Facilitators: Building Principals & PLC Leads			
Location: Morning: Respective Buildings			
Afternoon: Stayton High School			
7:30 AM - 11:30 AM	Staff will participate in school-wide site-specific professional development held at their respective building locations, with Mari-Linn Middle School staff gathering at SMS.		
11:30 AM - 12:30 PM	LUNCH Hosted at Morning Site		
Secondary Afternoon Breakout Schedule			
Time	District PLC & Small Breakout Agenda	Room #	District PLC Leads & Admin
12:30 PM - 1:00 PM	Inclusive Welcome - Secondary Math Share-out for all teams NSSD Middle School Math Overview -2026-2027 NSSD High School Math Overview - 2026-27	SHS Cafeteria	6-12 Math Team 6-12 Admin
1:00 PM - 3:00 PM (Small Group PLC Work)	6 - 12 Math & Science - Quick meet-and-greet, discuss vertical articulation, & respond to this Google Form 1:00 PM - 1:30 PM: WestEd virtual meeting (Link)	403	Carl, Lindsey, Robertson Admin: Westenskow
	6 - 12 ELA, Social Studies, SPED - Quick meet-and-greet, discuss vertical articulation, & respond to this Google Form 1:35 PM - 2:05 PM: WestEd virtual meeting (Link)	121-122	Shafer, Anundson, Hill, Glover, Rose, Dayton Admin: Olson
	6 - 12 ELD, CTE, Health&PE, Fine Arts, Deans, and other specialists - Quick meet-and-greet, discuss vertical articulation, & respond to this Google Form 2:10 PM - 2:40 PM: WestEd virtual meeting (Link)	400	Shoemaker, Wolf, Hendricks Admin: Proctor
3:00 PM - 3:30 PM	Final wrap-up for secondary staff at SHS Intentional Close	SHS Cafeteria	PLC Leads All 6-12 Admin



NSSD Certified Professional Learning Day | October 9, 2026

Participants will need to bring their own devices for sessions. There are few Chromebooks available.



Specialists		
Group	Conference	Location
Music	OMEA District 4 Inservice	Salem, Oregon
Speech	OSHA Conference	Salem, Oregon
Reading Specialists	Reading Intervention Focus	TBD
Counselors	OSCA Annual Conference	West Salem High School, Salem
Other	SPED- With grade levels Behavior Specialists- With grade levels, SPED for secondary	

Strategic Themes and Focus Area Alignment:

Quality Staff
Teaching and Learning

Upcoming:

YouthTruth Survey

At-A-Glance Accountability

Star Assessment Reports - SB 141

Health Instructional Material Adoption

New Staff Coaching and Mentoring



North Santiam School District 29J

Serving Lyons, Mehama, Stayton, and Sublimity

MEMORANDUM

TO: North Santiam SD Board of Directors

FROM: Rhonda Allen, Director of Business and Fiscal Services

DATE: October 9, 2026

SUBJECT: Financial Statement as of September 30, 2026

Attached for your review are the financial statements for the 2026-27 fiscal year, covering the period through September 30, 2026. The report represents an unaudited beginning fund balance.

Key Highlights:

- **General Fund:** The statements include both actual revenues and expenditures from July 1 through September 30, 2026 and projections through June 30, 2027.
 - The projected General Fund Ending Fund Balance is \$2,416,111.
 - Contingency and Unappropriated Ending Fund Balance equal \$1,429,233.
- **Investments:** The district's investments, held in the Local Government Investment Pool, total \$15,776,382 and yielded a return of 4.02% through September 30, 2026.

The financial packet includes the following statements:

- General Fund Statement of Revenues Budget vs. Actual
- General Fund Statement of Expenditures Budget vs. Actual
- Food Service Actuals to Budget
- Total Appropriations for the Fiscal Year
- Grant Funds and Special Revenue Funds
- Donations Report

Please let me know if you have any questions or concerns regarding these statements.

1155 N 3rd Ave, Stayton, Oregon 97383

P: 503.769.6924 F: 503.769.3578

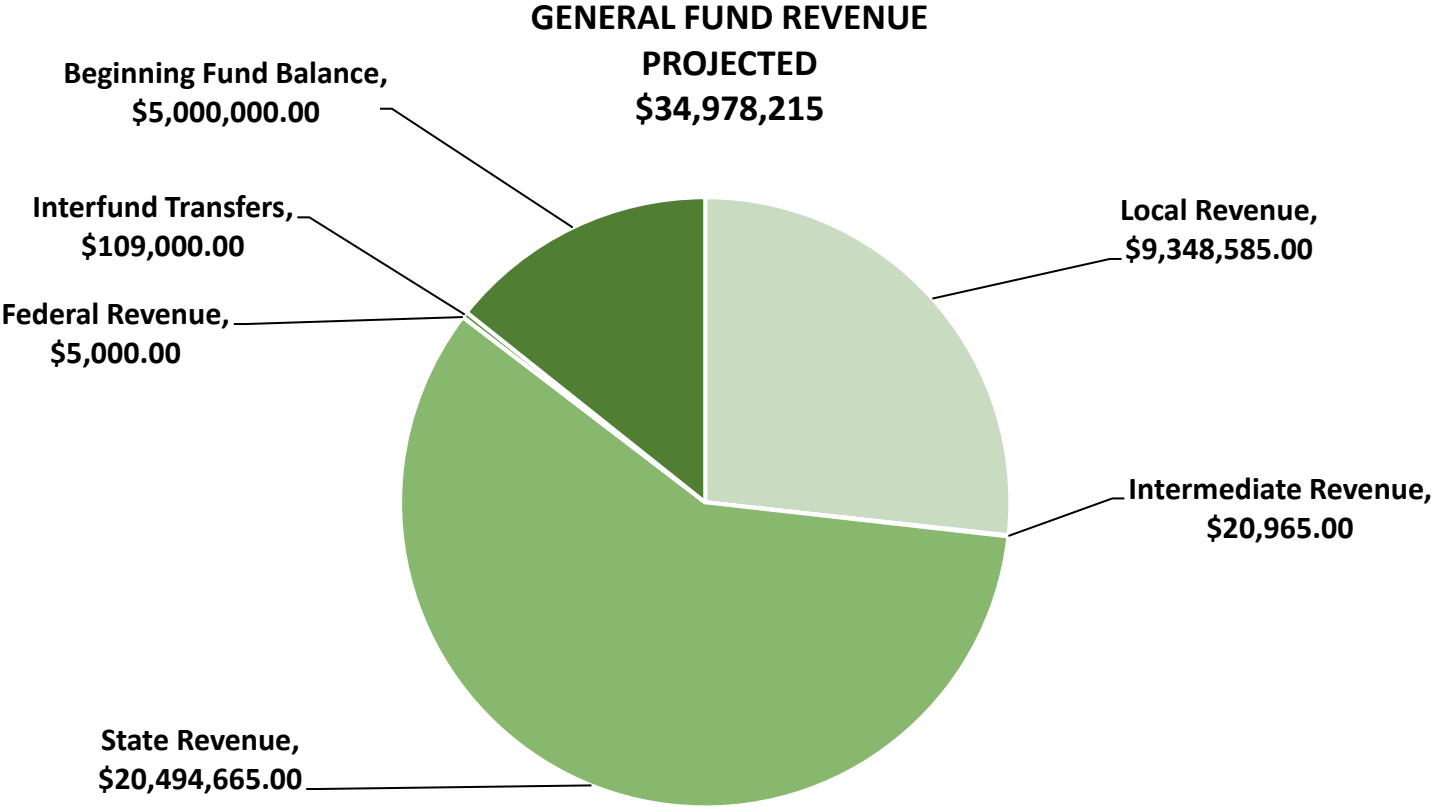
www.nssd29j.org ~ communications@nsantiam.k12.or.us

GENERAL FUND
STATEMENT OF BUDGET REVENUE VS. ACTUAL

	2026-27 Budget	Actual YTD Rev. 9/30/2026	Projected Revenue 6/30/2027	Total Estimated 2026-27
1000 Revenue From Local Sources				
1111 Current Year's Taxes	8,253,000	-	8,253,000	8,253,000
1112 Prior Year's Taxes	145,000	20,189	123,374	143,563
1114 Payments in Lieu of Property Taxes	20,000	-	116	116
1190 Interest Earnings	-	-	-	-
1200 Revenue from Local Gov't	-	-	-	-
1510 Interest on Investments	700,000	167,158	532,842	700,000
1700 Fees	27,000	6,302	17,141	23,443
1910 Rentals	8,000	540	9,090	9,630
1920 Donations	-	-	-	-
1960 Recovery of Prior Year Funds	-	-	-	-
1980 Fees Charged to Grants	140,000	-	208,834	208,834
1990 Miscellaneous	10,000	130	9,870	10,000
Total Revenue From Local Sources	\$ 9,303,000	194,318	9,154,267	9,348,585
2000 Revenue from Intermediate Sources				
2101 County School Funds	19,500	-	19,500	19,500
2102 General Education Service District Funds	-	-	-	-
2199 Other Intermediate Sources	-	-	-	-
2800 Revenue in Lieu of Taxes	-	1,465	-	1,465
Total Revenue from Intermediate Sources	\$ 19,500	1,465	19,500	20,965
3000 Revenue From State Sources				
3101 State School Fund—General Support	20,046,378	6,711,598	13,424,211	20,135,809
3103 Common School Fund	301,151	-	311,856	311,856
3104 State Managed County Timber	2,000	-	2,000	2,000
3107 State School Fund High Cost Disability	45,000	-	45,000	45,000
Total Revenue From State Sources	\$ 20,394,529	6,711,598	13,783,067	20,494,665
4000 Revenue From Federal Sources				
4801 Federal Forest Fees	5,000	-	5,000	5,000
Total Revenue From Federal Sources	\$ 5,000	-	5,000	5,000
5000 Revenue From Other Sources				
5200 Interfund Transfers	109,000	-	109,000	109,000
5400 Beginning Fund Balance**	5,000,000	-	5,000,000	5,000,000
Total Revenue From Other Sources	\$ 5,109,000	-	5,109,000	5,109,000
Total Resources	\$ 34,831,029	\$ 6,907,382	\$ 28,070,834	34,978,215.82
		Less Estimated Requirements		\$ 31,132,882
		Estimated Ending Fund Balance		\$ 3,845,334
		Less Contingency & UEFB		\$ 1,429,223
		Estimated Ending Fund Balance		\$ 2,416,111

GENERAL FUND
REVENUE PROJECTIONS

Funding Source	Budget	Actuals	Projected	Total Estimated
Local Revenue	\$9,303,000.00	194,318	\$9,154,267.09	\$9,348,585.00
Intermediate Revenue	\$19,500.00	1,465	\$19,500.00	\$20,965.00
State Revenue	\$20,394,529.00	6,711,598	\$13,783,067.00	\$20,494,665.00
Federal Revenue	\$5,000.00	-	\$5,000.00	\$5,000.00
Interfund Transfers	\$109,000.00	-	\$109,000.00	\$109,000.00
Beginning Fund Balance	\$5,000,000.00	-	\$5,000,000.00	\$5,000,000.00



NORTH SANTIAM SCHOOL DISTRICT 29J
FISCAL YEAR 2026-27, AS OF 09/30/2026

GENERAL FUND
EXPENDITURE PROJECTIONS

Expenditure Functions	2026-27 Budget	Actual YTD EXP 9/30/2026	Projected Expenditures 6/30/2027	Total Estimated 2026-27	(Over)/ Under Budget
1000 Instruction					
1111 Elementary, K-5 or K-6	6,165,970	476,113	5,365,596.66	5,841,710	324,260
1120 AVID Instruction	4,375	-	1,842.19	1,842	2,533
1121 Middle/Junior High Programs	3,512,749	280,302	3,232,446.56	3,512,749	-
1122 Middle/Junior High School Extracurricular	182,655	23,171	147,980.56	171,151	11,504
1131 High School Programs	3,557,115	269,184	3,053,104.32	3,322,288	234,827
1132 High School Extracurricular	896,570	148,070	715,428.35	863,498	33,072
1220 Restrictive Pgms for Students w/Disabilities	2,212,633	172,190	1,846,147.37	2,018,337	194,296
1223 Transitions	500	-	500.00	500	-
1250 Programs for Students w/Severe Disabilities	1,383,906	97,016	1,053,317.83	1,150,334	233,572
1271 Remediation	571,064	50,384	560,140.33	610,524	(39,460)
1272 Title I-A	109,134	11,969	118,253.10	130,222	(21,088)
1281 Alternative Education High School	124,000	1,546	53,333.00	54,879	69,121
1285 District Options Academy	601,568	38,575	500,398.20	538,973	62,595
1291 English Second Language Programs	604,257	44,418	476,580.74	520,999	83,258
1292 Teen Parent Program	6,100	-	900.00	900	5,200
1460 Summer School, Middle/Jr High	800	-	800.00	800	-
Total Instruction	\$ 19,933,396	\$ 1,612,939	\$ 17,126,769	\$ 18,739,708	\$ 1,193,688
2000 Support Services					18
2111 Safety and Security Direction	\$20,316.00	4,727	15,588.58	20,316	\$0.00
2115 Student Safety	\$119,220.00	22,206	97,261.79	119,468	(248)
2119 Attendance and Social Work Services	\$75,486.00	12,637	63,182.00	75,819	(333)
2120 Guidance Services	\$233,315.00	24,699	191,346.80	216,046	17,269
2134 Nurse Services	\$310,017.00	73,215	236,802.12	310,017	-
2139 Other Health Services	\$4,200.00	45	1,840.68	1,886	2,314
2142 Psychological Testing Services	\$4,000.00	562	3,117.11	3,679	321
2143 Behavior Specialists	\$0.00	486	-	486	(486)
2152 Speech Pathology Services	\$143,548.00	19,968	191,923.70	211,891	(68,343)
2190 Service Direction, Student Support Services	\$511,573.00	81,341	430,232.37	511,573	-
2210 Teaching and Learning	-	68	-	68	(68)
2211 Teaching and Learning Service Area Direction	\$410,249.00	112,345	338,929.25	451,274	(41,025)
2213 Curriculum Development	\$108,550.00	14,825	20,636.17	35,461	73,089
2219 Other Improvement of Instrution Svcs	\$1,800.00	-	15.29	15	1,785
2220 Educational Media Services	\$324,197.00	39,965	284,232.15	324,197	-
2240 Instructional Staff Development	\$74,856.00	12,799	40,585.57	53,385	21,471
2310 Board of Educatin Services	\$130,575.00	18,129	84,651.50	102,780	27,795
2320 Executive Administration Services	\$695,569.00	121,981	397,771.15	519,752	175,817
2410 Office of the Principal Services	\$2,800,195.00	594,389	2,058,029.41	2,652,419	147,776
2510 Direction of Business Support Services	\$243,664.00	61,860	168,724.10	230,585	13,079
2520 Fiscal Services	\$448,352.00	124,747	323,605.00	448,352	-
2528 Risk Management Services	\$535,000.00	516,119	28,188.00	544,307	(9,307)
2541 Maintenance & Facilities Service Area Direction	\$161,047.00	47,369	145,093.43	192,462	(31,415)
2542 Care and Upkeep of Buildings Services	\$2,779,288.00	544,115	1,846,466.90	2,390,582	388,706

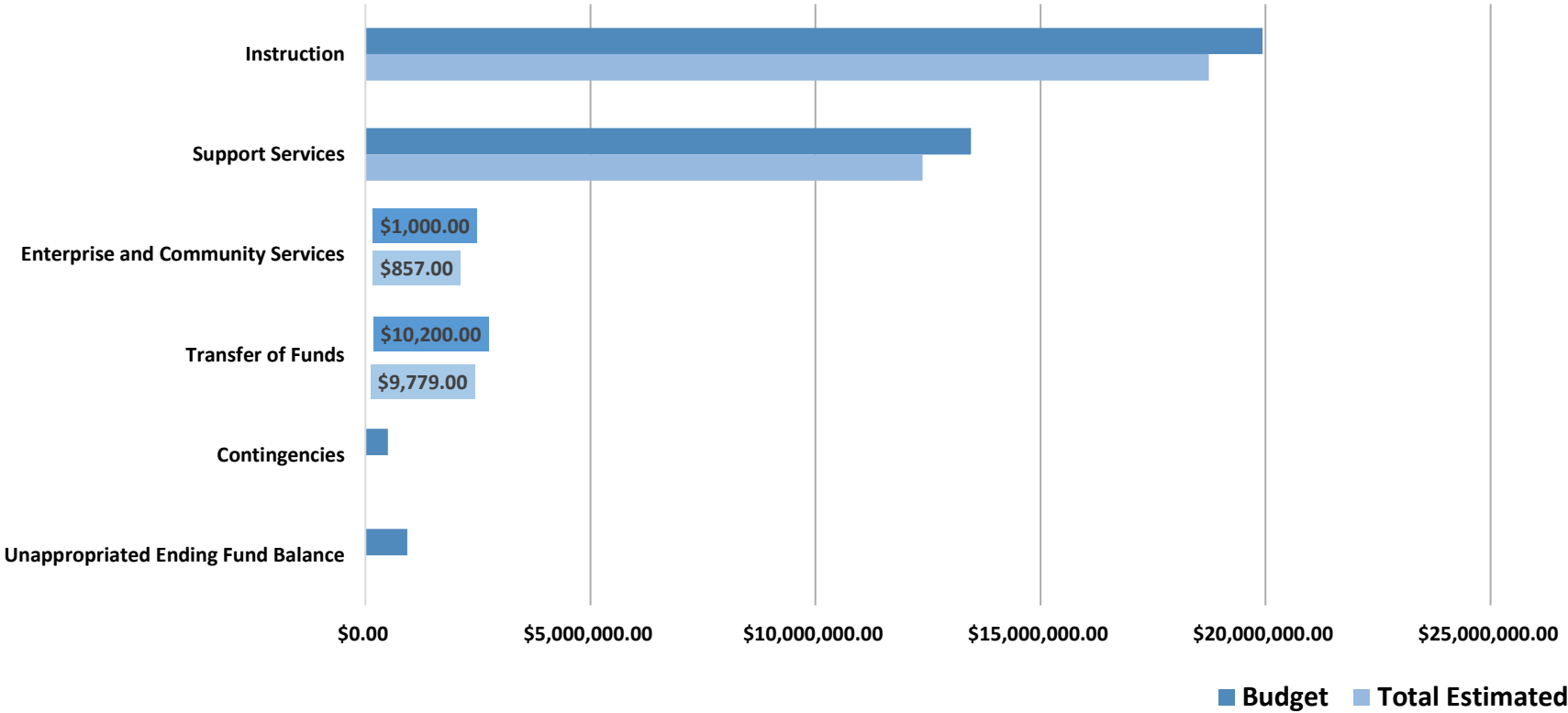
GENERAL FUND
EXPENDITURE PROJECTIONS

Expenditure Functions	2026-27 Budget	Actual YTD EXP 9/30/2026	Projected Expenditures 6/30/2027	Total Estimated 2026-27	(Over)/ Under Budget
2543 Care and Upkeep of Grounds Services	\$169,022.00	37,822	112,649.19	150,471	18,551
2546 Other Property Services	\$10,200.00	-	10,200.00	10,200	-
2549 Other Operation and Maintenance Services	\$34,037.00	-	28,896.89	28,897	5,140
2550 Student Transportation Services	\$1,348,354.00	-	1,348,354.00	1,348,354	-
2558 Special Education Transportation Services	\$250,000.00	-	250,000.00	250,000	-
2630 Information Services	\$82,918.00	15,047	68,013.08	83,060	(142)
2640 Staff Services	\$276,256.00	62,597	213,659.00	276,256	-
2641 Human Resources Service Area Direction	\$256,050.00	66,758	189,292.00	256,050	-
2649 Other Staff Services	\$0.00	72	-	72	(72)
2660 Technology Services	\$895,356.00	245,708	316,649.99	562,358	332,998
Total Support Services	\$ 13,457,210	\$ 2,876,601	\$ 9,505,937	\$ 12,382,538	\$ 1,074,672
3000 Enterprise and Community Services		-			
3360 Welfare Activities Services	1,000	-	856.65	857	143
Total Enterprise and Community Services	\$ 1,000	\$ -	\$ 857	\$ 857	\$ 143
5000 Other Uses					19
5110 Long Term Debt Service	-	-	-	-	-
5200 Transfers of Funds	10,200	-	9,779.43	9,779	421
Total Other Uses	\$ 10,200	\$ -	\$ 9,779	\$ 9,779	\$ 421
6000 Contingencies		-			
6110 Operating Contingency	499,223	-	-	-	499,223
Total Contingencies	\$ 499,223	\$ -	\$ -	\$ -	\$ 499,223
7000 Unappropriated Ending Fund Balance		\$ -			
7000 Unappropriated Ending Fund Balance	930,000	-	-	-	930,000
Total Unappropriated Ending Fund Balance	\$ 930,000	\$ -	\$ -	\$ -	\$ 930,000

GENERAL FUND
GENERAL FUND EXPENDITURES VS ACTUALS

General Fund Expenditures	Budget	Actuals	Projected	Total Estimated
Instruction	\$19,933,396.00	\$1,612,938.76	\$17,126,769.21	\$18,739,708.00
Support Services	\$13,457,210.00	\$2,876,600.73	\$9,505,937.21	\$12,382,538.00
Enterprise and Community Services	\$1,000.00	\$0.00	\$856.65	\$857.00
Transfer of Funds	\$10,200.00	\$0.00	\$9,779.43	\$9,779.00
Contingencies	\$499,223.00	\$0.00	\$0.00	\$0.00
Unappropriated Ending Fund Balance	\$930,000.00	\$0.00	\$0.00	\$0.00

GENERAL FUND: BUDGET VS. TOTAL ESTIMATED EXPENDITURES: \$31,132,882

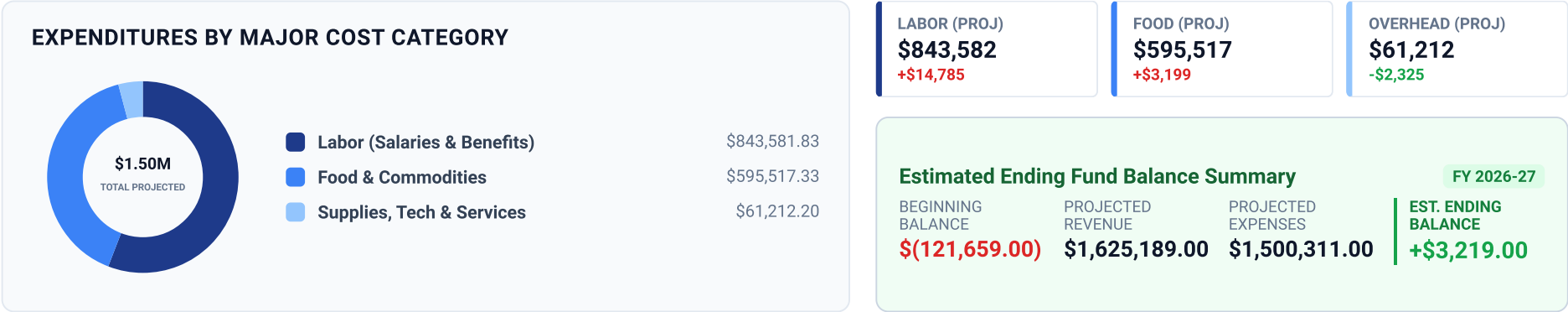


FOOD SERVICE
STATEMENT OF BUDGET REVENUE AND EXPENDITURES VS. ACTUAL

	2026-27 Budget	Actual as of 9/30/2026	Encumbered as of 9/30/2026	Total	(Over)/Under Budget
REVENUE					
1610/1620 Daily Sales	27,000	9,532	27,000	36,532	(9,532)
1630 Special Functions	-	-	-	-	-
1920 Donations	-	-	-	-	-
1940 Services Provided Other LEA's	11,952	-	11,952	11,952	-
1990 Miscellaneous Revenue	1,000	-	1,000	1,000	-
3299 State Breakfast/Lunch SSA	315,000	35,191	313,109	348,300	(33,300)
4500 CEP Incentive	-	-	-	-	-
4513 NSLP Breakfast	310,000	35,134	317,466	352,600	(42,600)
4515 NSLP Lunch	665,000	71,028	634,172	705,200	(40,200)
4519 Farm to School	15,000	-	15,000	15,000	-
4525 Summer Food	15,000	24,405	15,000	39,405	(24,405)
4910 USDA Commodities	105,000	-	105,000	105,000	-
5200 Interfund Transfers	10,200	-	10,200	10,200	-
5400 Beginning Fund Balance	9,500	-	(121,659)	(121,659)	131,159
TOTAL REVENUE	\$ 1,484,652	\$ 175,290	\$ 1,328,240	\$ 1,503,530	\$ (18,878)
EXPENDITURES					
Enterprise and Community Services					
3100-100 Salaries	446,184	58,593	394,259	452,853	(62,159)
3100-200 Payroll Costs	382,613	41,300	349,429	390,729	(8,116)
3100-300 Contracted Services	7,660	4,756	923	5,678	1,982
3100-410 Supplies and Materials	38,500	6,646	31,638	38,285	215
3100-411 Fuel	587	96	492	587	-
3100-415 USDA Commodities	105,000	-	105,000	105,000	-
3100-450 Food	487,318	66,070	424,448	490,517	(3,199)
3100-460 Non-Consumable	3,500	641	2,609	3,250	250
3100-470 Computer Software	9,120	9,119	-	9,119	1
3100-480 Computer Hardware	-	-	-	-	-
3100-540 Equipment Replacement	-	-	-	-	-
3100-640 Dues and Fees	4,170	4,293	-	4,293	(123)
TOTAL EXPENDITURES	1,484,652	\$ 191,513	\$ 1,308,798	\$ 1,500,311	\$ (15,659)
FOOD SERVICE EST EFB				\$ 3,219	

Food Service Revenue, Expenditure & Ending Fund Balance

2026-27 BUDGET VS. TOTAL (PROJECTED) EXECUTIVE SUMMARY



EXPENDITURE BREAKDOWN: BUDGET VS. TOTAL (PROJECTED)

MAJOR CATEGORY	CODES INCLUDED	2026-27 BUDGET	TOTAL (PROJECTED)	VARIANCE (OVER/UNDER)
Labor & Payroll	3100-100 (Salaries) / 3100-200 (Benefits)	\$828,797.00	\$843,581.83	+\$14,784.83
Food & Food Supplies	3100-450 (Food) / 3100-415 (USDA Commodities)	\$592,318.00	\$595,517.33	+\$3,199.33
Supplies & Operations	3100-410 (Supplies) / 3100-470 (Software)	\$47,620.00	\$47,403.53	-\$216.47
Services & Fees	3100-300 / 3100-640 / 3100-460 / 3100-411	\$15,917.00	\$13,808.67	-\$2,108.33
TOTAL EXPENDITURES		\$1,484,652.00	\$1,500,311.00	+\$15,659.00

APPROPRIATIONS
BUDGET VS. ACTUAL

General Fund (100)	Appropriations	YTD	Encumbrances	Totals	Resolutions	(Over)/Under Budget
1000 Instruction	19,933,396	1,612,938	15,684,801	17,297,739		2,635,657
2000 Support Services	13,457,210	2,876,599	8,771,761	11,648,360		1,808,850
3000 Community Services	1,000	-	-	-		1,000
5200 Transfers	10,200	-	-	-		10,200
6000 Contingency	499,223	-	-	-		499,223
Sub Total	\$ 33,901,029	\$ 4,489,537	\$ 24,456,562	\$ 28,946,099	\$ -	\$ 4,954,930
Special Revenue Funds (200)						
1000 Instruction	2,912,282	307,328	1,733,073	2,040,400		871,882
2000 Support Services	4,058,232	628,951	1,732,928	2,361,879		1,696,353
3000 Community Services	175,969	10,943	64,526	75,469		100,500
4000 Facilities Acquisition	200,000	-	-	-		200,000
5200 Transfers	189,000	-	-	-		189,000
6000 Contingency	2,625,366	-	-	-		2,625,366
Sub Total	\$ 10,160,849	\$ 947,222	\$ 3,530,526	\$ 4,477,748	\$ -	\$ 5,683,101
Food Service Funds (299)						
3000 Community Services	1,484,652	191,513	1,203,798	1,395,311	-	89,341
Sub Total	\$ 1,484,652	\$ 191,513	\$ 1,203,798	\$ 1,395,311	\$ -	\$ 89,341
PERS Bond Debt Service (310.321.375)						
5100 Debt Service	5,585,000	-	5,578,096	5,578,096	-	6,904
6000 Contingency	1,450,403	-	-	-	-	23,450,403
Sub Total	\$ 7,035,403	\$ -	\$ 5,578,096	\$ 5,578,096	\$ -	\$ 1,457,307
Facilities (400,401,420,425,426,430,448)						
1000 Instruction Services	60,000	-	-	-		60,000
2000 Support Services	585,640	32,200	12,100	44,300		541,340
4000 Facilities Acquisition	2,407,820	5,180	161,004	166,184		2,241,636
5110 Debt Service	-	-	-	-		-
6000 Contingency	569,000	-	-	-		569,000
Sub Total	\$ 3,622,460	\$ 37,380	\$ 173,104	\$ 210,484	\$ -	\$ 3,411,976
Internal Service Funds (600)						
2000 Support Services	151,200	22,224	630	22,854		128,346
6000 Contingency	779,940	-	-	-		779,940
Sub Total	\$ 931,140	\$ 22,224	\$ 630	\$ 22,854	\$ -	\$ 908,286
Trust and Agency Fund (700)						
2000 Support Services	11,348	3,500	-	3,500	-	7,848
6000 Contingency	38,050	-	-	-	-	38,050
Sub Total	\$ 49,398	\$ 3,500	\$ -	\$ 3,500	\$ -	\$ 45,898
Total Appropriations	57,184,931	5,691,377	34,942,716	40,634,094	-	16,550,837
Total Unappropriated	930,000	-	-	-	-	930,000
APPROPRIATION TOTAL	\$ 58,114,931	\$ 5,691,377.36	\$ 34,942,716.24	\$ 40,634,093.60	\$ -	\$ 17,480,837

SPECIAL REVENUE FUNDS: GRANTS DETAIL

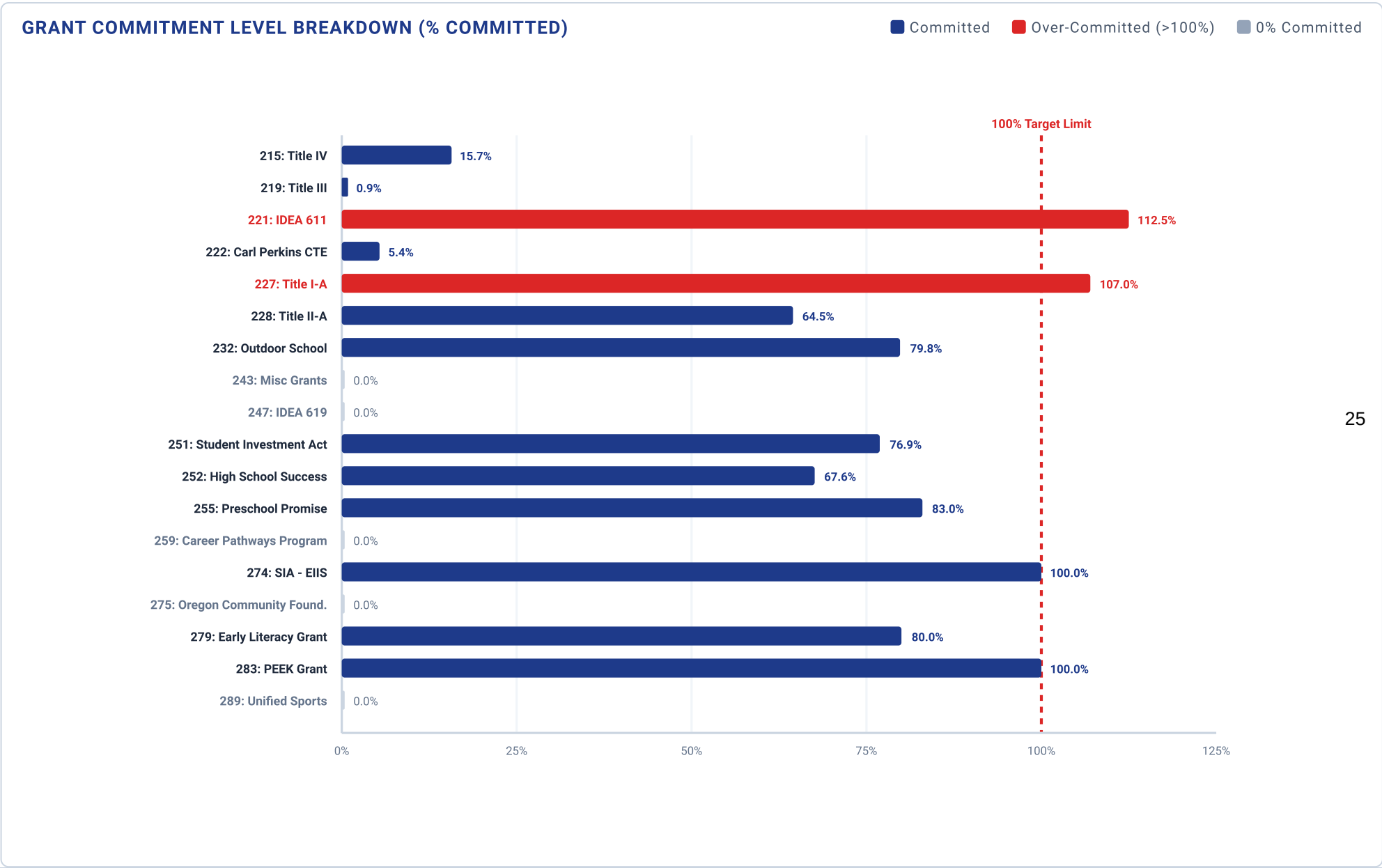
Detailed allocation, expenditure, encumbrance, and remaining grant balance breakdown

Fund Code & Name	26-27 Allocation	YTD Expended	Encumbrances	Total Committed	Grant Balance	% Committed	Status / Notes
215: Title IV	\$44,249.18	\$2,988.07	\$3,946.94	\$6,935.01	\$37,314.17	15.7%	
219: Title III	\$15,452.41	\$0.00	\$132.00	\$132.00	\$15,320.41	0.9%	
221: IDEA 611	\$509,850.46	\$46,326.15	\$527,131.87	\$573,458.02	-\$63,607.56	112.5%	
222: Carl Perkins CTE	\$6,800.00	\$0.00	\$365.00	\$365.00	\$6,435.00	5.4%	
227: Title I-A	\$490,273.00	\$46,097.45	\$478,447.62	\$524,545.07	-\$34,272.07	107.0%	
228: Title II-A	\$64,000.00	\$15,540.20	\$25,729.30	\$41,269.50	\$22,730.50	64.5%	
232: Outdoor School	\$90,259.37	\$21,729.22	\$50,270.21	\$71,999.43	\$18,259.94	79.8%	
243: Misc Grants	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00	0.0%	
247: IDEA 619	\$2,472.08	\$0.00	\$0.00	\$0.00	\$2,472.08	0.0%	
251: Student Investment Act (Yrs 1&2)	\$2,607,484.86	\$519,161.74	\$1,487,274.48	\$2,006,436.22	\$601,048.64	76.9%	
252: High School Success (Yrs 1&2)	\$750,673.84	\$142,833.12	\$364,313.97	\$507,147.09	\$243,526.75	67.6%	
255: Preschool Promise (Yrs 1&2)	\$587,168.22	\$60,465.84	\$427,166.37	\$487,632.21	\$99,536.01	83.0%	
259: Career Pathways Program	\$5,615.43	\$0.00	\$0.00	\$0.00	\$5,615.43	0.0%	
274: SIA - EHS	\$8,017.32	\$0.00	\$8,017.32	\$8,017.32	\$0.00	100.0%	
275: Oregon Community Foundation	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00	0.0%	
279: Early Literacy Grant	\$148,599.18	\$16,849.15	\$102,021.19	\$118,870.34	\$29,728.84	80.0%	
283: PEEK Grant	\$70,000.00	\$6,955.83	\$63,044.17	\$70,000.00	\$0.00	100.0%	
289: Unified Sports	\$1,706.00	\$0.00	\$0.00	\$0.00	\$1,706.00	0.0%	
TOTAL GRANTS	\$5,403,661.35	\$878,946.77	\$3,537,860.44	\$4,416,807.21	\$986,854.14	81.7%	

24

GRANTS COMMITMENT ANALYSIS

Visual breakdown of percent committed across all 18 Special Revenue Fund grants



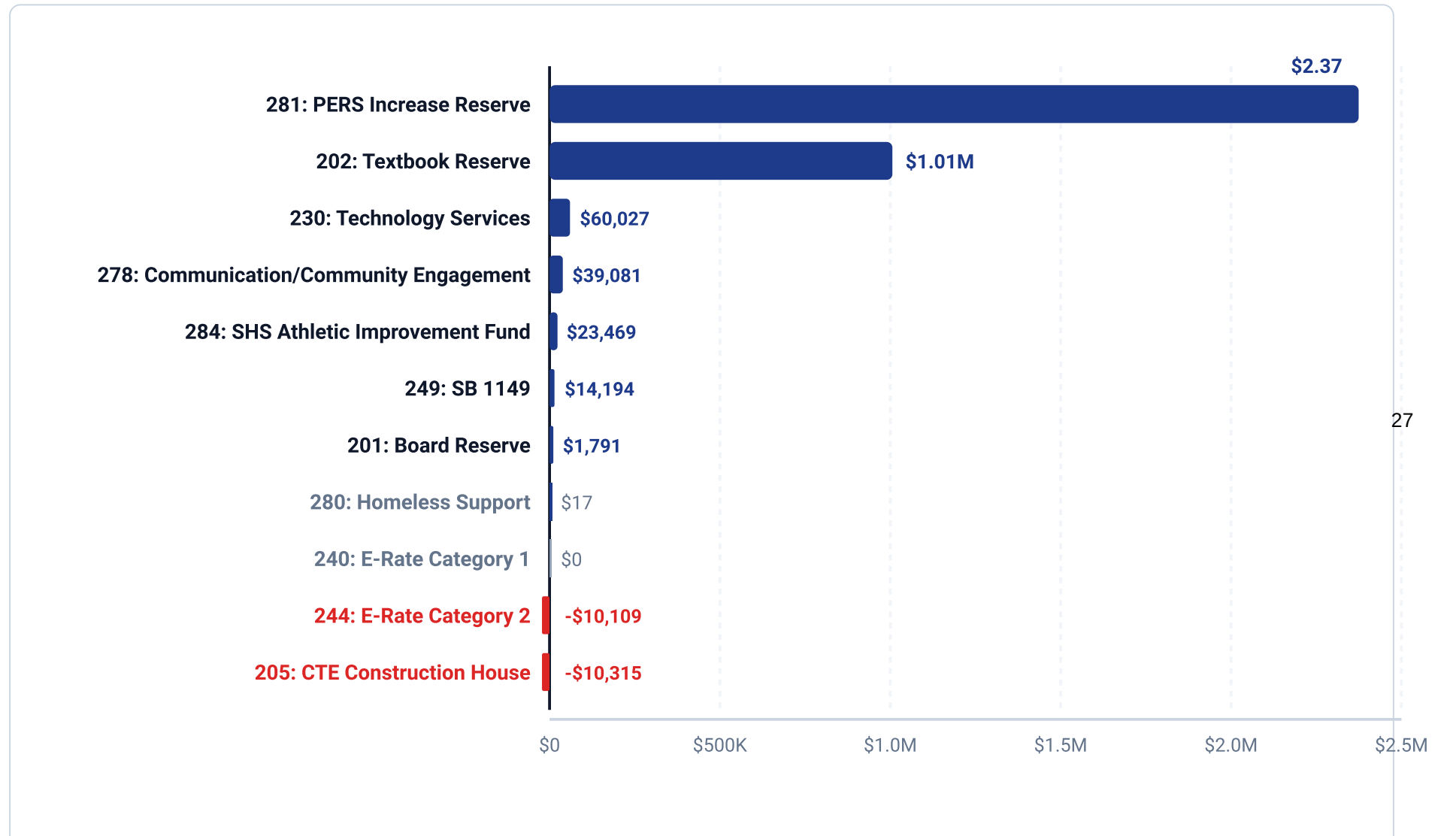
SPECIAL REVENUE FUNDS: LOCAL RESERVES & OTHER

Beginning balance, YTD revenues, YTD expenses/encumbrances, and ending fund balances

Fund Code & Name	26-27 Beginning Fund Bal	YTD Revenue	YTD Exp / Enc	Ending Fund Balance	Notes & Purpose
201: Board Reserve	\$1,791.00	\$0.00	\$0.00	\$1,791.00	Board Reserve
202: Textbook Reserve	\$1,006,350.00	\$0.00	\$0.00	\$1,006,350.00	Textbook Adoption Reserve
205: CTE Construction House	-\$9,879.00	\$0.00	\$436.26	-\$10,315.26	Student Construction House
230: Technology Services	\$28,602.00	\$31,425.00	\$0.00	\$60,027.00	Technology Program Funds
240: E-Rate Category 1	\$0.00	\$0.00	\$0.00	\$0.00	E-Rate Category 1
244: E-Rate Category 2	\$11,895.00	\$0.00	\$22,004.00	-\$10,109.00	E-Rate Category 2
249: SB 1149	\$0.00	\$14,193.67	\$0.00	\$14,193.67	Energy Efficiency Funds/SB1149
278: Communication/Community Engagement	\$39,081.00	\$0.00	\$0.00	\$39,081.00	Community Outreach Activities
280: Homeless Support	\$17.00	\$0.00	\$0.00	\$17.00	McKinney-Vento Support
281: PERS Increase Reserve	\$2,276,845.00	\$97,904.42	\$0.00	\$2,374,749.42	PERS Reserve
284: SHS Athletic Improvement Fund	\$23,608.00	\$4,599.65	\$4,739.00	\$23,468.65	Athletic Activities
TOTAL SPECIAL REVENUE	\$3,378,310.00	\$148,122.74	\$27,179.26	\$3,499,253.48	

SPECIAL REVENUE FUNDS: LOCAL RESERVES & OTHER

Ending Fund Balances Overview



NORTH SANTIAM SCHOOL DISTRICT 29J
FISCAL YEAR 2026-27, AS OF 09/30/2026

DISTRICT DONATIONS
YTD: September 30, 2026

PROGRAM	SCHOOL		AMOUNT
Athletics: Cheer	Stayton High School	\$	1,000.00
Athletics: Cross Country	Stayton High School	\$	100.00
Athletics: Football	Stayton High School	\$	156.00
Athletics: Girls Soccer	Stayton High School	\$	2,750.00
Athletics: Volleyball	Stayton High School	\$	250.00
Eagle Care Center	Stayton High School	\$	1,000.00
WE Fund	Stayton High School	\$	2,300.00
		TOTAL DONATIONS	\$ 7,556.00

Oregon PERS: What School Districts Really Pay for Pensions

A Policymaker's Briefing on Hidden Pension Costs in K–12 Education

Key Takeaways

Pension Costs Growing Faster than Budgets: Pension costs have grown faster than K–12 education budgets over the last two decades, and Oregon's school funding formulas may not be fully accounting for the total burden.

Hidden and Undercounted Costs: Oregon school districts are required to cover the full cost of K–12 employer pension obligations to the Public Employees' Retirement System (OPERS). The officially reported contribution figure—\$1.25 billion in 2025—understates the true cost. Many districts have borrowed money through Pension Obligation Bonds (POBs) to pre-pay into OPERS. This lowers the contributions they actually pay each year—but they still make annual debt payments on those bonds. Those debt payments are not captured in the \$1.25 billion figure.

Key Numbers

Adjusted for inflation, OPERS contributions from school districts increased 74% from 2005 to 2025. Over those two decades Oregon also increased K-12 spending, but the cost of OPERS has increased faster.

\$1.25B

Reported school district contributions to OPERS (2025)

This is what districts report paying directly to OPERS—but it does not include debt service payments on Pension Obligation Bonds.

+74%

Real increase in school district OPERS contributions, 2005–2025

Inflation-adjusted growth in reported contributions over two decades.

27.6%

OPERS employer contribution rate as % of payroll (2025)

Up from 18.3% in 2005, averaged across all benefit tiers. Some districts use pre-paid "Side Accounts" to reduce this rate.

Pension Costs vs. Education Spending

The table below shows how pension contributions have grown relative to the overall K–12 budget.

Metric	2005 (nominal)	2005 (infl. adj.)	2025
Total K–12 expenditures	\$6.80B	\$11.27B	\$14.58B
School district OPERS contributions	\$433.91M	\$719.60M	\$1.25B
Increase in K–12 total spending, 2005–2025 (infl-adj)			+30%
Increase in OPERS contributions, 2005–2025 (infl-adj)			+74%

Conclusion: Pension costs have grown significantly faster (74%) than the growth rate of total education spending (30%).

Important caveat: The \$1.25 billion figure above still doesn't tell the full story. Districts that issued Pension Obligation Bonds make annual debt service payments on those bonds separately—payments that are not counted in OPERS contribution totals. The true cost of pensions to Oregon school districts is higher than what's reported.

Why Are Costs Growing?

In 2007, OPERS had a \$9.7 billion surplus. By 2025, it carries a \$15.4 billion unfunded liability. Three factors drove this swing:

- 1 Investment shortfalls.** When actual investment returns fall below assumptions, unfunded liabilities grow.
- 2 Updated actuarial assumptions.** Revised estimates (e.g., people living longer) increased projected benefit costs.
- 3 Interest on existing debt.** Unpaid pension debt compounds over time, making it harder to close the gap.

ABOUT THIS BRIEF

This analysis is a collaboration between Equable Institute and the Oregon Network for Education Excellence. Data is sourced from ODE and OPERS. Visit www.equable.org and www.oregonedexcellence.org for more information.

Financial Report

Period Ending September 30, 2026

PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM

Topics:

- Overview of PERS Structure
- PERS Pension Programs
- PERS Contribution Rates 25-27 and 27-29
- North Santiam SD PERS Rates and Contributions
- PERS Side Account
- Questions



Department Roles & Responsibilities

1. Legislature

PLAN SPONSOR

Sole Statutory Authority

Holds sole authority for creating and changing laws that set or modify the PERS benefit structure for public employees.

2. PERS Agency

ADMINISTRATION

Rules & Policy Implementation

Interprets legislative bills, develops operational policies, creates administrative rules, checks state laws, and enforces regulations.

3. Employer

DATA & CONTRIBUTIONS

Data Reporting & System Funding

Provides PERS with employee data for benefit calculations and contributes required funds into the system to pay future pension obligations.

4. Treasury

ASSET MANAGEMENT

Oregon State Treasury Investment

Employer funds are managed by the Oregon State Treasury, overseeing asset investment and establishing overall investment strategies.

PLAN ELIGIBILITY

Three PERS Pension Programs by Hire Date

Tier One

Hired on or before Dec 31, 1995

Legacy Tier One Plan

Tier Two

Hired Jan 1, 1996 – Aug 28, 2003

Tier Two Plan

32

OPSRP Plan

Hired on or after Aug 29, 2003

OPSRP (Oregon Public Service Retirement Plan)

TIER ONE CUTOFF
Dec 31, 1995

TIER TWO CUTOFF
Aug 28, 2003

OPSRP EFFECTIVE
Aug 29, 2003 – Present

Key Takeaways

Division of Governance

Legislature sets law, PERS Agency administers policy, Employers collect data & funding, and Treasury invests funds.

Three Tiered Structure

Employee plan membership (Tier 1, Tier 2, or OPSRP) is determined strictly by original hire date cutoffs.

Financial Report

Period Ending September 30, 2026

The PERS Funding Equation

This basic equation — used by the PERS actuary at the end of each calendar year to calculate the system's funded status — illustrates how PERS is funded.

B**=****C****+****E**

BENEFIT DESIGN

present value of
earned benefits

Set by:
Oregon Legislature

CONTRIBUTIONS

employer and member
funds to pay pension
benefits

Set by:
PERS Board

EARNINGS

future returns on
invested funds

Managed by:
Oregon State Treasury,
Oregon Investment Council

34



School District PERS Pool Employers

**All school districts, education service districts, and charter schools are automatically members of the School Districts Pool and are statutorily required to participate.
(ORS 238 and 238A)**

North Santiam School District Rates 2026-27

<u>Plan Category</u>	<u>Employer Contribution Rate</u>	<u>Effective Date Range</u>
Tier 1 and Tier 2	4.81% (6.49%)	July 1, 2025 - June 30, 2027
OPSRP General Service	1.63% (3.31%)	July 1, 2025 - June 30, 2027
Employer 6% Pick Up	6.00%	36

Employer Contribution Rates reflect the 1.68% rate credit. This is called the One-Time Rate Credit or SB 849 Rate Offset. The normal contribution rates are in parenthesis above.

North Santiam School District Rates 2027-28

<u>Plan Category</u>	<u>Employer Contribution Rate</u>	<u>Effective Date Range</u>
Tier 1 and Tier 2	21.48%	July 1, 2027 - June 30, 2029
OPSRP General Service	18.89%	July 1, 2027 - June 30, 2029
Employer 6% Pick Up	6.00%	

37

Tier 1 and Tier 2 Rate Increase = 16.67%

OPSRP Rate Increase = 17.26%

****Contribution rates are paid monthly on payroll subject wages****

The SB 849 Rate Offset ended June 30, 2027

North Santiam School District

Monthly PERS Contribution: 2026-27

<u>Employee</u>	<u>Subject Wages</u>	<u>Employer Contribution Rate</u>	<u>PERS Contribution</u>
Tier I Employee	\$7,676	4.81%	\$370
6% Pick Up	\$7,676	6.00%	\$461
2003 PERS Bond	\$7,676	10.00%	³⁸ \$768
2021 PERS Bond	\$7,676	5.30%	\$406
PERS Reserve	\$7,676	4.28%	\$329
TOTAL PERS			\$2,334

North Santiam School District

PERS COST BREAKDOWN: 2026-27

PERS PROJECTED MONTHLY COST BREAKDOWN

\$407,409

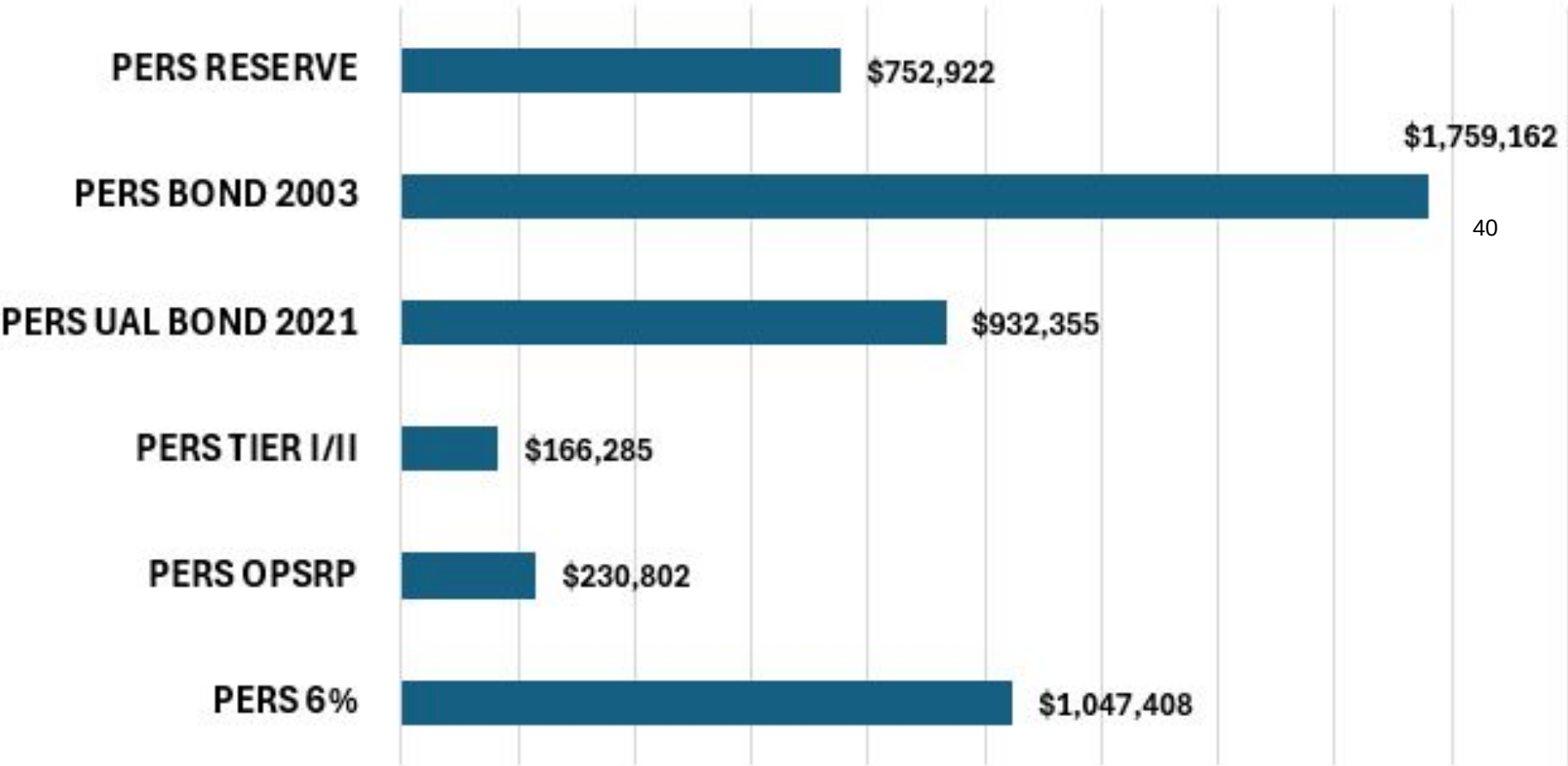


North Santiam School District

PERS ANNUAL COST BREAKDOWN: 2026-27

PERS PROJECTED ANNUAL COST BREAKDOWN

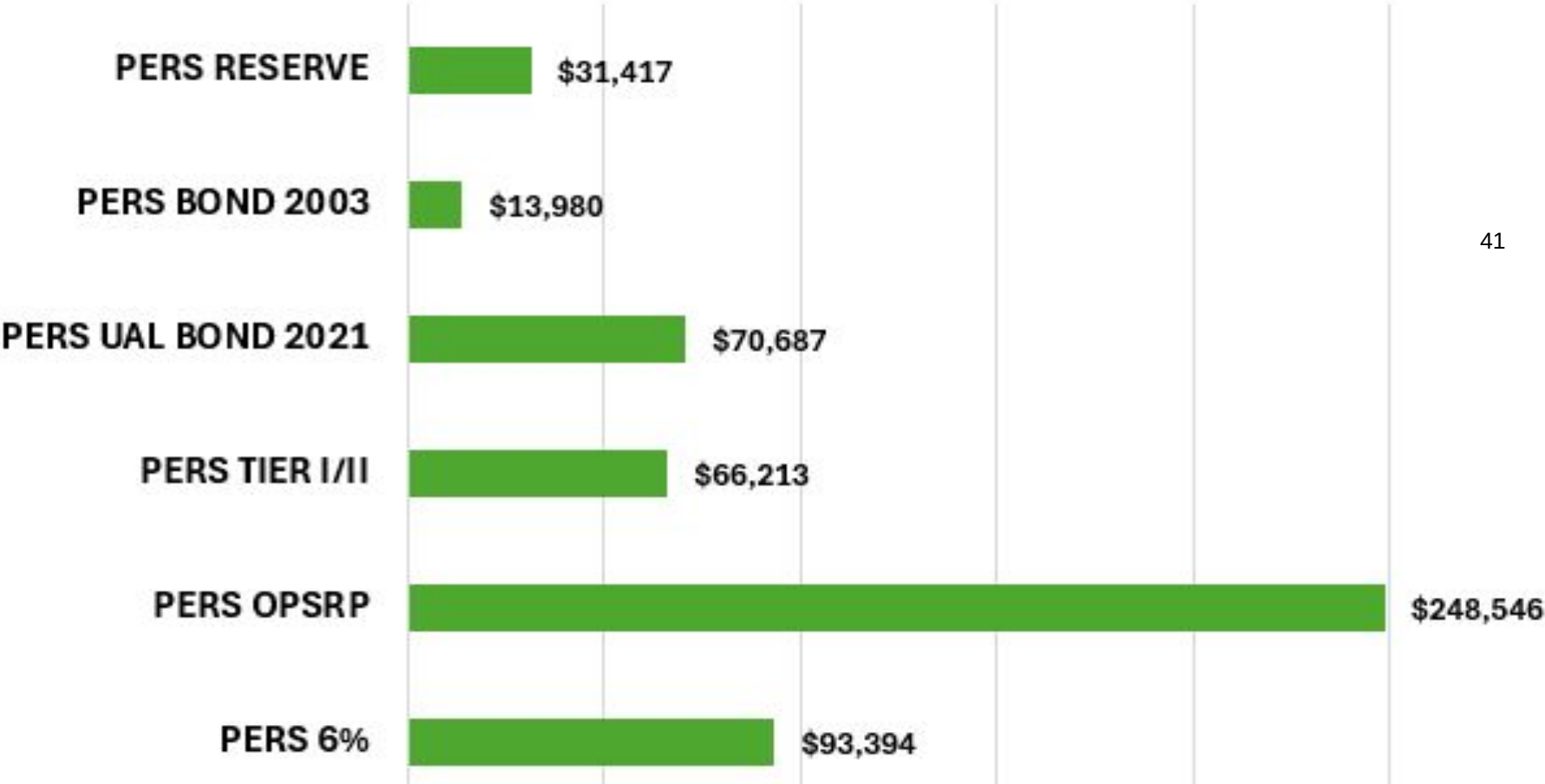
\$4,888,934



North Santiam School District

PERS MONTHLY COST BREAKDOWN: 2027-28

PERS PROJECTED MONTHLY COST BREAKDOWN
\$524,237



North Santiam School District

PERS ANNUAL COST BREAKDOWN: 2027-28

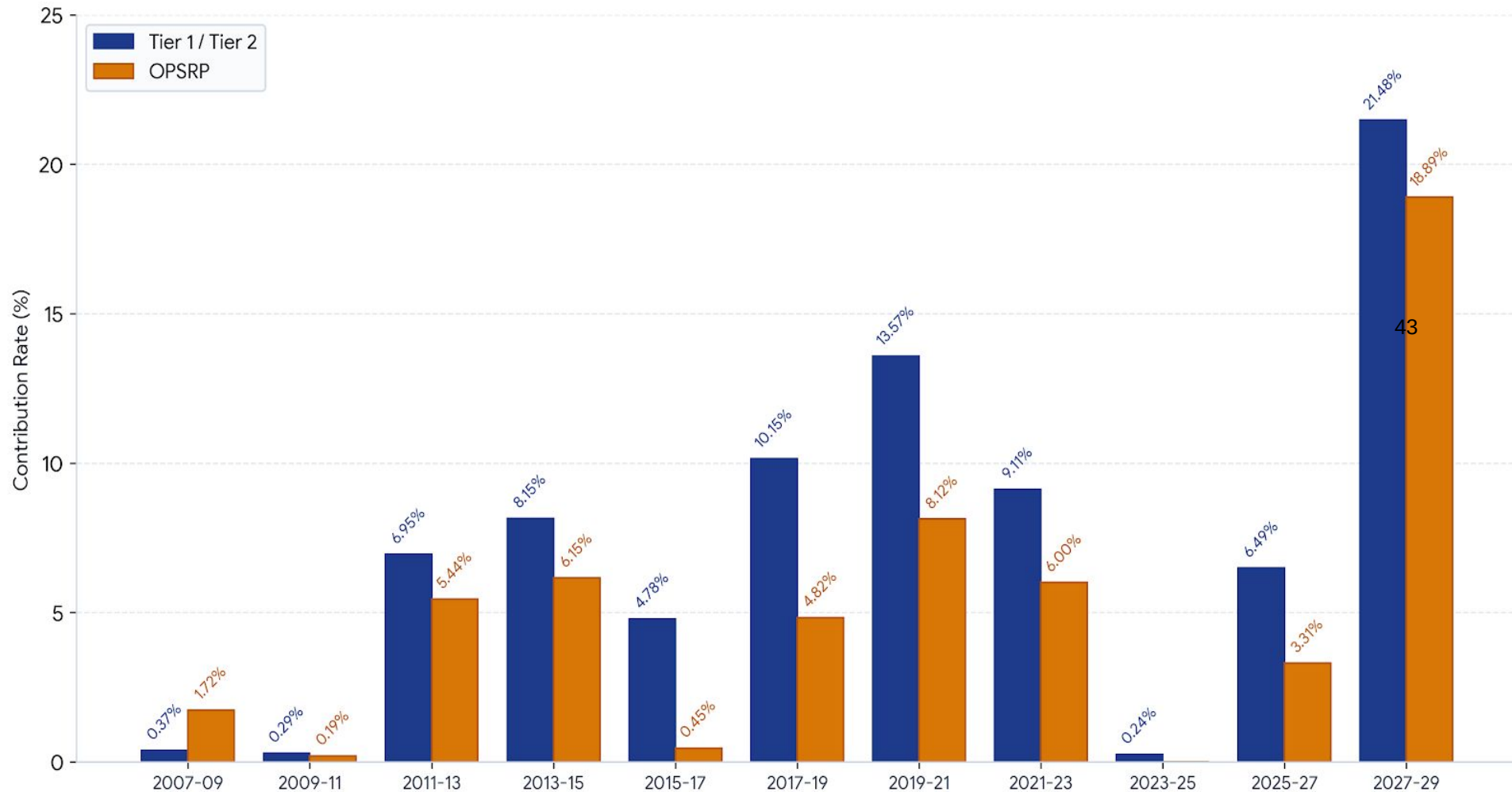
PERS PROJECTED ANNUAL COST BREAKDOWN
\$6,290,848



Financial Report

Period Ending September 30, 2026

PERS Employer Contribution Rates by Biennium (%)



Financial Report

Period Ending September 30, 2026

PERS SIDE ACCOUNT????

QUESTION: What is a PERS Side Account?

44

QUESTION: How does a PERS Side Account benefit North Santiam School District?



Financial Report

Period Ending September 30, 2026

Definition: A special account established when a participating public employer makes a lump-sum payment to prepay all or a portion of its unfunded actuarial liability (UAL).

Key Details:

- Employer-Only Accounts
- Investment & Earnings
- Rate Reduction
- Expiration & Lifecycle



Financial Report

Period Ending September 30, 2026

What is UAL?

- Unfunded Actuarial Liability
- Difference between the actual cost of pension benefits (liabilities) and assets (contribution + investment earnings).

46

$$\text{UAL} = \text{Actuarial Liabilities} - \text{Actuarial Assets}$$

*what the pension fund
owes to all current and
future retirees*

*contributions, side
accounts, and
investments*



Financial Report

Period Ending September 30, 2026

Why a Side Account for North Santiam?

PERS Employer Contribution Rates by Biennium (%)



Financial Report

Period Ending September 30, 2026

QUESTIONS?

Monthly Financial Report



RESOLUTION NO.101526A

A RESOLUTION OF THE BOARD OF DIRECTORS OF NORTH SANTIAM SCHOOL DISTRICT NO. 29J, MARION AND LINN COUNTY, 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 North Santiam School District No. 29J, Marion and Linn County, 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 \$8,507,819 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 NORTH SANTIAM SCHOOL DISTRICT NO. 29J, MARION AND LINN COUNTY, 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 North Santiam School District No. 29J, Marion and Linn County, 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 Director of Business & Fiscal Services 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 4.80% 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 North Santiam School District No. 29J, located in Marion and Linn County, Oregon this 15th day of October, 2026.

**North Santiam School District No. 29J
Marion and Linn County, Oregon**

By: _____
Chair

ATTEST:

By: _____
Superintendent

Exhibit A

Report on Pension Bonds

Prior to the issuance of pension obligation bonds, the North Santiam School District No. 29J (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 not retained the services of 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:

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.

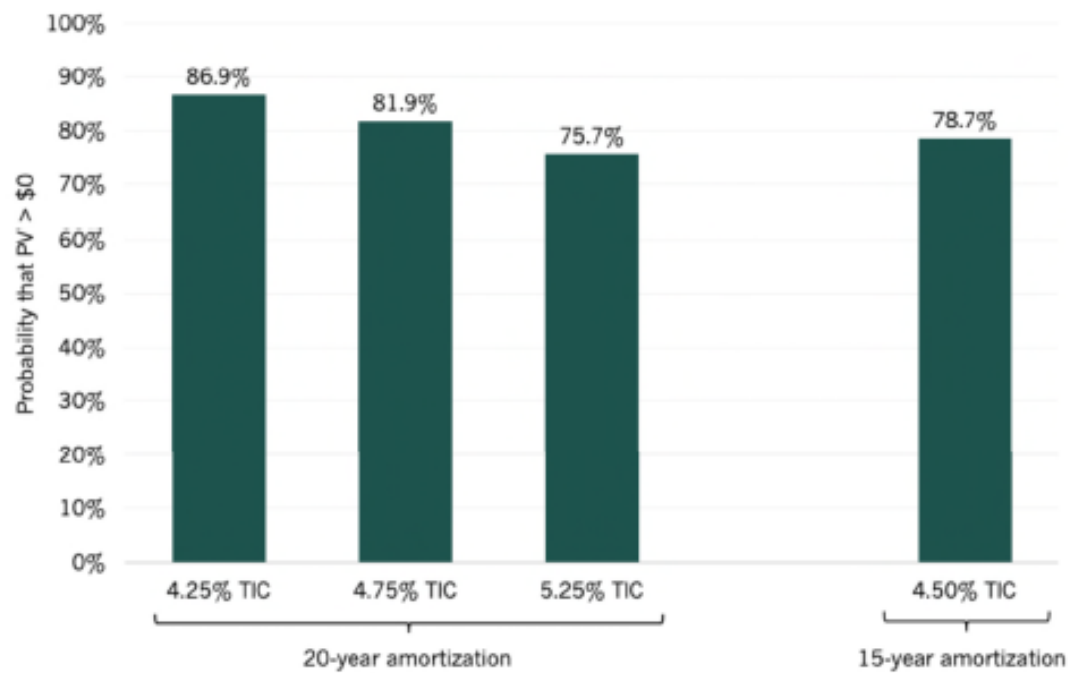
The 5th percentile net present value falls below zero at every TIC, rising as a share of the initial deposit as the TIC increases for a given amortization period. For example, with a TIC of 4.25 percent, the 5th percentile net present value is 9.7 percent of the initial deposit, rising to 17.4 percent 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.



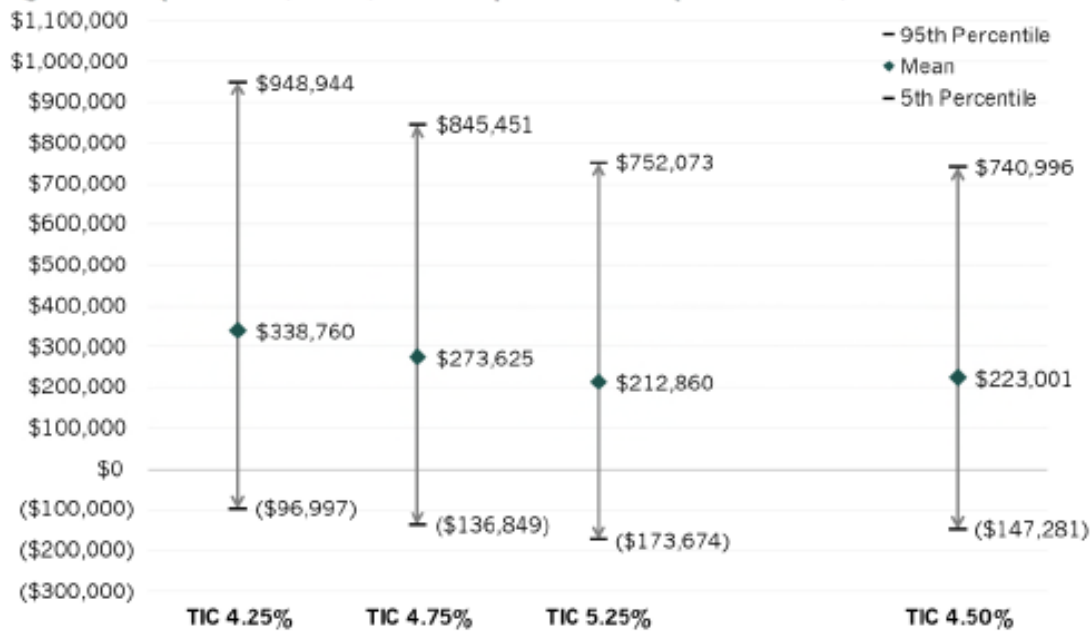
Figure 1: Probability that the net present value of POB issuance is greater than zero, various TICs



Source: ECOnorthwest.



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



Source: EONorthwest.



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 expected 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:

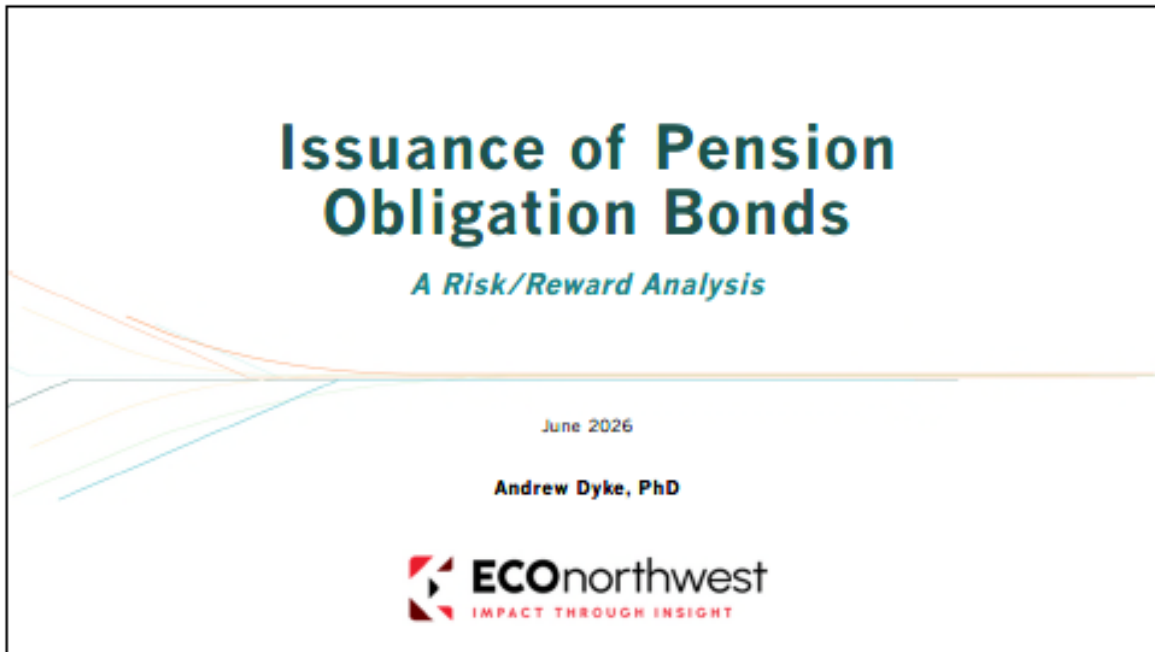
- Actual issuance TIC may differ from those in the scenarios
- The TIC does not capture some issuance costs
- The employer's payroll growth rate may differ significantly from that assumed by the PERS actuary³

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>.

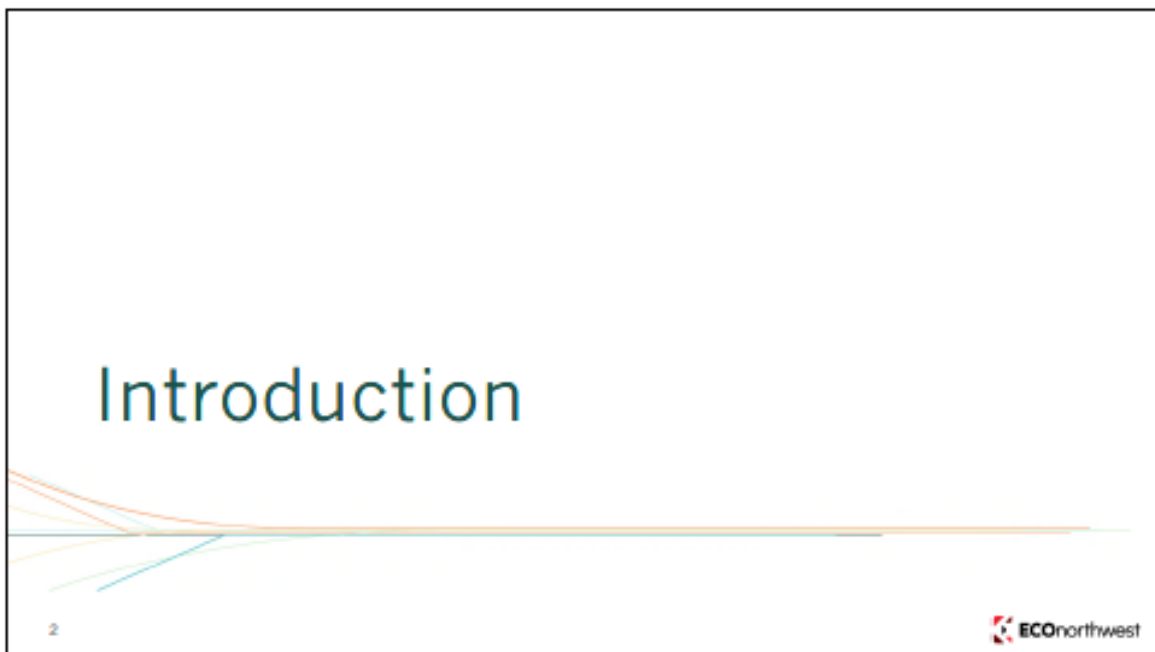


Exhibit 1 to the Report

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

3 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.



3

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.

4 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.



4

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

5



5

Approach

6



6

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

7 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.



7

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.

8 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.



8

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.

9 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.



9

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

10 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.



10

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

11 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.



11

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

12 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.



12

Model Results

13



13

Mean Annual Side Account Returns

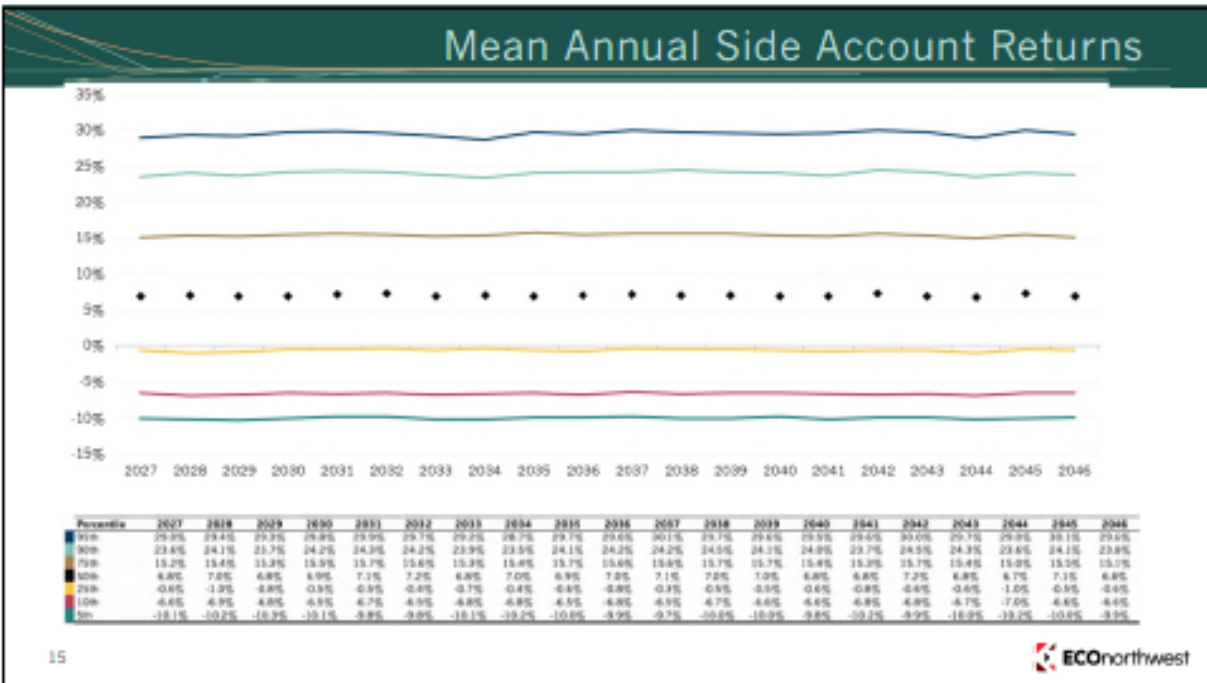
- The forecast extends to fiscal year 2047, the last year the side account exists
 - ◆ **Trend in mean annual return:** Stays constant at 6.8% in 2027, varying slightly through the end of the forecast horizon
 - ◆ **Trend in 95th percentile return:** Increases from 29.0% in 2027 to 29.6% as of the forecast 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

14

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.



14



15

Geometric Mean Returns

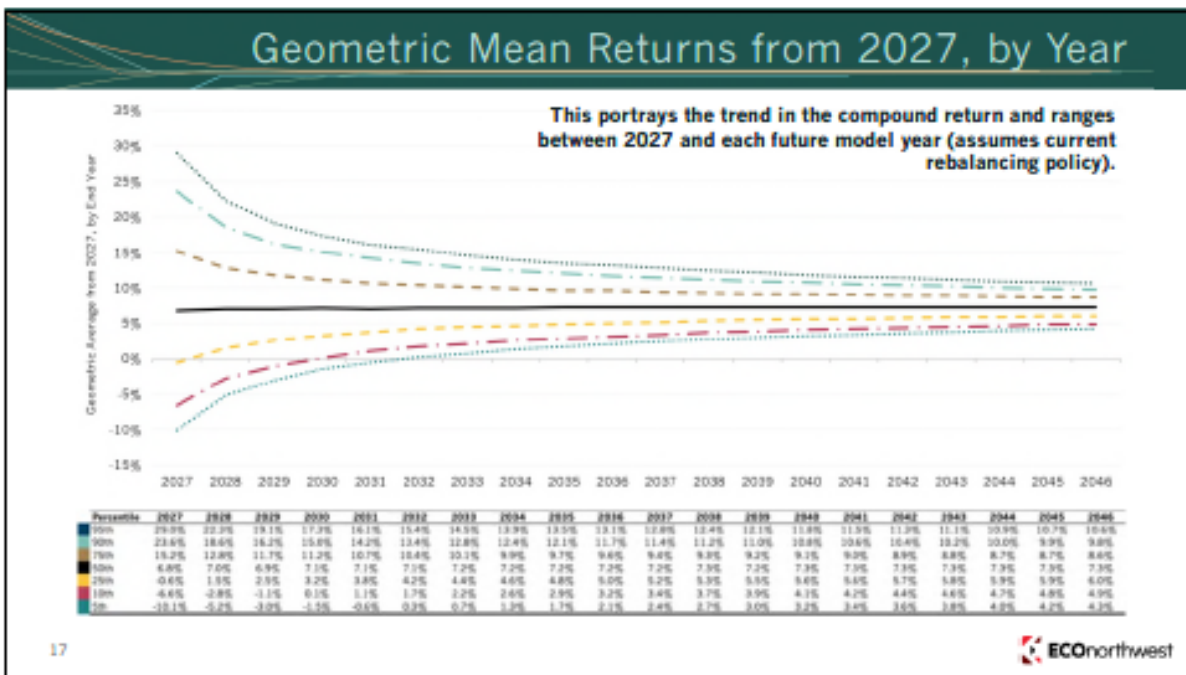
- Fiscal year 2047 is the assumed final year of bonds
 - ◆ The projected annualized geometric mean return over the term of the bonds is 7.3%
 - ◆ The 95th percentile return is 10.6%
 - ◆ The 5th percentile return is 4.3%
- These forecast returns are also similar to those derived by other consultants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

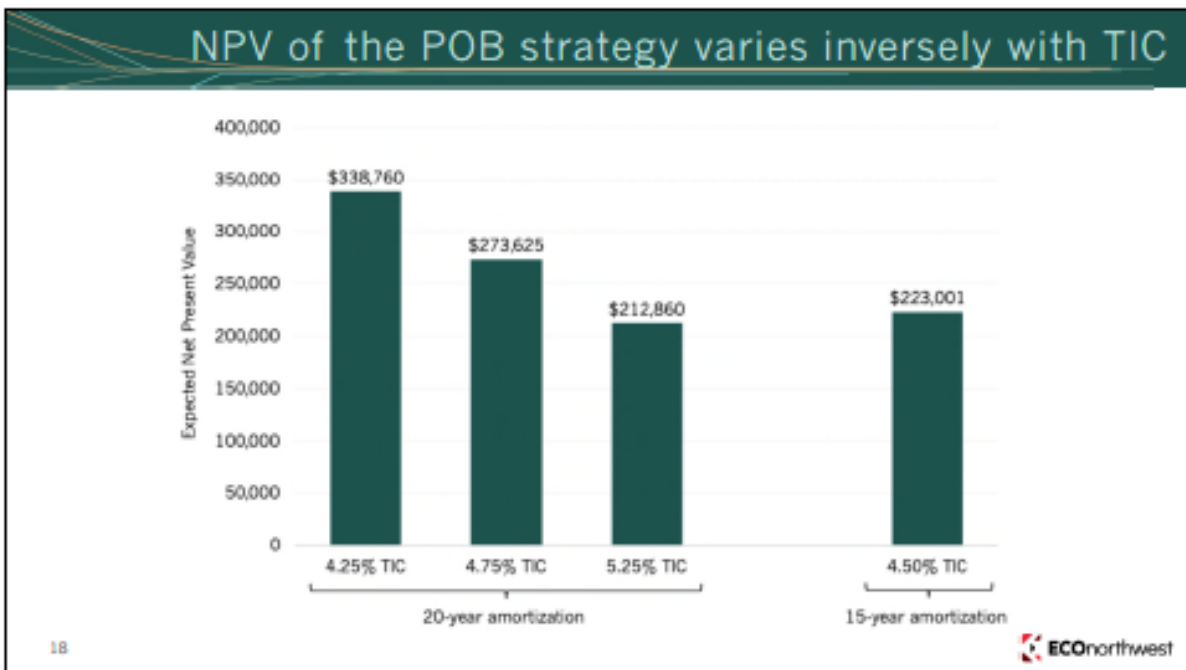
16

ECOnorthwest

16



17



18

Measuring the risk of POBs

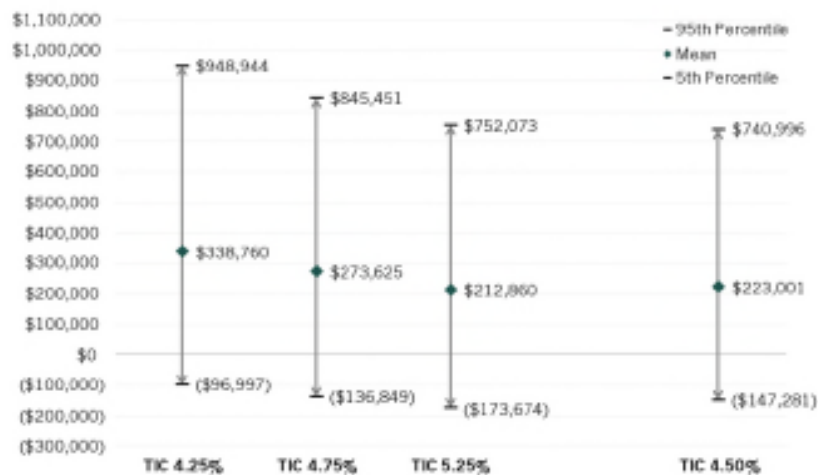
- Value at risk (VaR) provides a useful measure for the risk of POB issuance
- The 5th percentile VaR identifies the NPV that the model indicates would be exceeded with a 95 percent probability
- In other words, there is a 95 percent chance the net present value will be positive or reflect a smaller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

19 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.



19

The Effect of TIC on NPV of POBs



20 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.



20

POB Probability of Success: NPV > \$0

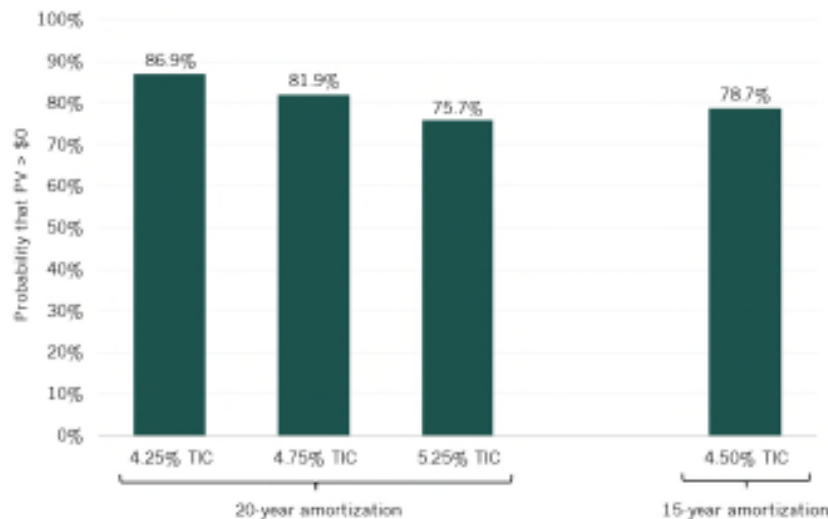
- The “probability of success” is another perspective on risk
 - ◆ The VaR measures the 5th percentile dollar value at risk
 - ◆ The “probability of success” or zero-bound identifies the overall probability that the NPV benefit is greater than zero (i.e., a success)
- Model results
 - ◆ The probability 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.



21

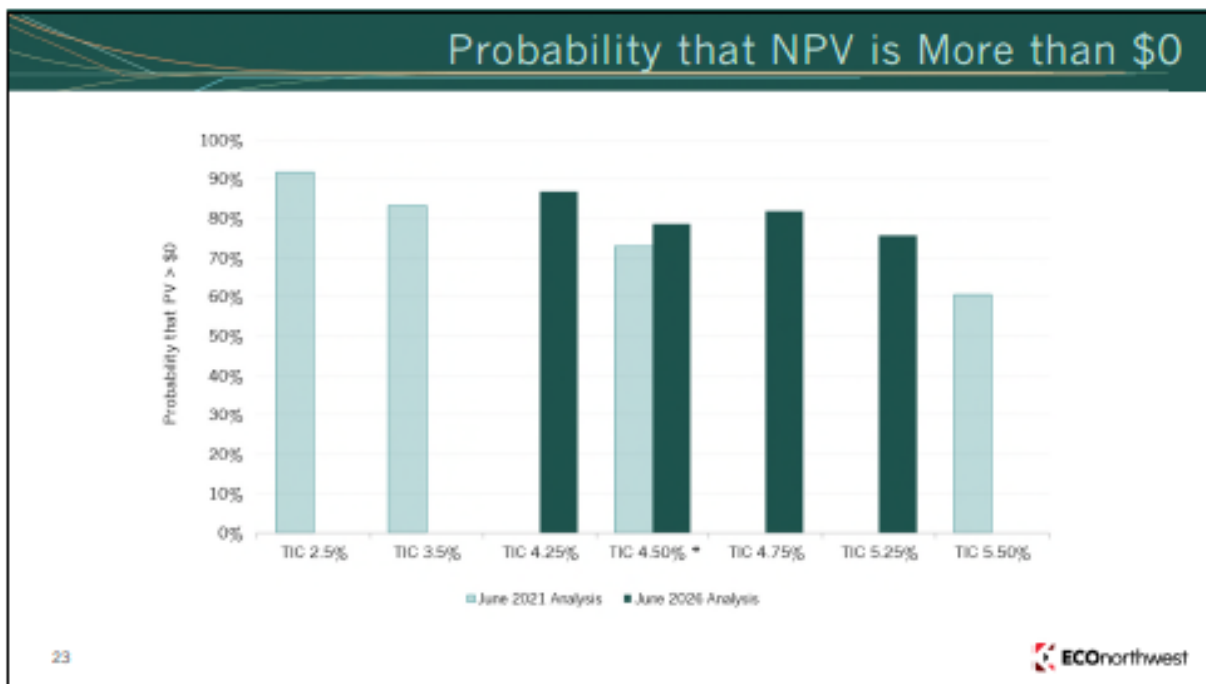
Probability that NPV is More than \$0



22



22



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.

ECONorthwest

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

25 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.



25

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.

26 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.



26



ECONorthwest
IMPACT THROUGH INSIGHT

www.econw.com

PORTLAND, OREGON Power + Light Building 920 SW 6th Ave, Suite 1400 Portland, OR 97204 503-222-6060	WASHINGTON Park Place 1200 Sixth Avenue, Suite 615 Seattle, WA 98101 206-823-3060	CALIFORNIA 9415 Culver Blvd #248 Culver City, CA 90232 213-218-6740	BEND, OREGON 2863 NW Crossing Drive, Suite 100 Bend, OR 97703 458-202-9016	DENVER, COLORADO 1200 17th Street Floor 10 Denver, CO 80202
--	---	---	--	---

27

Summary

There have been several changes to Oregon Public Meetings laws over the last few years. These include statutes from the Oregon Legislature and rules from the Oregon Government Ethics Commission. This update has been classified as “Required” by OSBA.

North Santiam School District

Code: CBG
Adopted: 7/01/96
Readopted: 8/21/97; 7/19/07; 12/14/17;
8/22/24
Orig. Code: 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 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.

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’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 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 remains unsatisfactory, the Board may dismiss or non-renew the superintendent pursuant to Board policy, the superintendent’s employment contract 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 precedent over this policy.

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. The notice must include:

- a. Identification of the Board;
- b. The time, date and location of the meeting;
- c. The purpose for which the Board proposes to convene the executive session, including the citation to the applicable section of ORS 192.660 and the fact that the Board will be reviewing and evaluating the performance of the superintendent; and
- d. Information on how the superintendent may make a request for an open hearing.

END OF POLICY

Legal Reference(s):

[ORS 192.660](#)
[ORS 332.107](#)

[ORS 332.505](#)

[OAR 199-040-0027](#)
[OAR 199-040-0030](#)
[OAR 581-022-2405](#)

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

Cross Reference(s):

BDC - Executive Sessions
CB - Superintendent
CBA - Qualifications and Duties of the Superintendent

Summary

House Bill 2684 (2025) added some new requirements to law for Integrated Pest Management Plan requirements. The first requires posting the Integrated Pest Management Plan and list of low-impact pesticides to the website (can be included in the Healthy and Safe Schools Plan); the second requires a review of a IPM plan every five years to identify updates, if any, and readoption. This update has been classified as “Required” by OSBA.

North Santiam School District

Code: EBB
Adopted: 1/26/12
Revised/Readopted: 2/19/15; 6/15/17
Orig. Code: EBB

Integrated Pest Management

To ensure the health and safety concerns of student, staff and community members, the ~~Board~~ district shall adopt an integrated pest management plan (IPM)¹ which emphasizes the least possible risk to students, staff and community members and shall adopt a list² of low-impact pesticides for use with the IPM plan. The IPM plan and list shall be available to the public through the district’s website³.

The IPM plan is a proactive strategy that:

1. Focuses on the long-term prevention or suppression of pest problems through economically sound measures that:
 - a. Protect the health and safety of students and staff;
 - b. Protect the integrity of district buildings and grounds;
 - c. Maintain a productive learning environment; and
 - d. Protect local ecosystem health.
2. Focuses on the prevention of pest problems by working to reduce or eliminate conditions of property construction, operation and maintenance that promote or allow for the establishment, feeding, breeding and proliferation of pest populations or other conditions that are conducive to pests or that create harborage for pests;

¹ {See ~~Model~~ Integrated Pest Management Program ~~Plan~~ for Oregon Schools at . The program includes access to Resources & Forms including Model plans for large school districts and small school districts.} http://www.ipmnet.org/tim/IPM_in_Schools/Model_School_IPM_Plan_Main_Page.htm

² See ORS 634.705(5).

³ Inclusion of the list and IPM in the district’s Healthy and Safe Schools Plan satisfies this requirement as long as it is posted on the district’s website.

3. Incorporates the use of sanitation, structural remediation or habitat manipulation or of mechanical, biological and chemical pest control measures that present a reduced risk or have a low-impact and, for the purpose of mitigating a declared pest emergency, the application of pesticides that are not low-impact pesticides;
4. Includes regular monitoring and inspections to detect pests, pest damage and unsanctioned pesticide usage;
5. Evaluates the need for pest control by identifying acceptable pest population density levels;
6. Monitors and evaluates the effectiveness of pest control measures;
7. Excludes the application of pesticides on a routine schedule for purely preventive purposes, other than applications of pesticides designed to attract or be consumed by pests;
8. Excludes the application of pesticides for purely aesthetic purposes;
9. Includes school staff education about sanitation, monitoring, inspection and pest control measures;
10. Gives preference to the use of nonchemical pest control measures;
11. Allows the use of low-impact pesticides if ~~nonchemical~~~~non-chemical~~ pest control measures are ineffective; and
12. Allows the application of a pesticide that is not a low-impact pesticide only to mitigate a declared pest emergency or if the application is by, or at the direction or order of, a public health official.

The district shall designate the facilities director or designee as the Integrated Pest Management Plan Coordinator and give them the authority for overall implementation and evaluation of the IPM plan.

Integrated Pest Management Plan Coordinator

The IPM Plan Coordinator shall:

1. Attend not less than six hours of IPM training each year. The training shall include at least a general review of integrated pest management principles and the requirements of IPM as required by Oregon statute;
2. Ensure appropriate prior notices are given and posted warnings have been placed when pesticide applications are scheduled;
3. Oversee pest prevention efforts;
4. ~~Ensure~~~~Ensuring~~ identification and evaluation of pest situation;
5. Determine the means of appropriately managing pest damage that will cause the least possible hazard to people, property and the environment;
6. Ensure the proper use and application of pesticide applications when non-pesticide controls have been unsuccessful;

7. Evaluate pest management results;~~and~~
8. Keep for at least four years following the application date, records of applied pesticides that include:
 - a. A copy of the label;
 - b. A copy of the Safety Data Sheet (SDS);
 - c. The brand name and U.S. Environmental Protection Agency (USEPA)~~USEPA~~⁴ registration number of the product;
 - d. The pest condition that prompted the application;
 - e. The approximate amount and concentration of pesticide applied;
 - f. The location and description of the area where the pesticide was applied;
 - g. The type of application and whether the application was effective;
 - h. The name(s) of the person(s) applying the pesticide;
 - i. The pesticide applicator's license numbers and pesticide trainee or certificate numbers of the person applying the pesticide;
 - j. The dates and times for the placement and removal of warning signs; and
 - k. Copies of all required notices given, including the dates the IPM Coordinator(s) gave the notices.
9. Respond to inquiries about the IPM plan and refer complainants to Board policy KL - Public Complaints; and
10. Conduct outreach to district staff about the district's IPM plan.

At least once every five years, the Board shall review the IPM plan, make any necessary updates and readopt the IPM plan.⁵ The final IPM plan shall include the day, month and year the Board adopted or readopted the plan.

END OF POLICY

Legal Reference(s):

[ORS 634.116](#)
[ORS 634.700 - 634.750](#)

Cross Reference(s):

EB - Safety Program
GBE - Staff Health and Safety

~~⁴U.S. Environmental Protection Agency~~

⁵ For IPMs adopted prior to January 1, 2026, the Board shall review, update and readopt the IPM no later than January 1, 2027, or five years from the date of the most recent approval of the plan, whichever is later.

Summary

Senate Bill 808 amended ORS 408.225, 408.230 and 408.235, which discusses issuing preferences to veterans and disabled veterans during a hiring or promotion process, and defined and added state servicemembers and former state servicemembers. These are service members who are current service members of the Oregon National Guard or former service members of the Oregon National Guard, and who meet the new provisions.

As a result, board policy GBA – Equal Employment Opportunity has been updated to reflect SB 808 and to account for the four different employment preferences now allowed under Oregon law. Additionally, OAR 581-022-2405 requires districts have policies regarding equal employment opportunities and affirmative action. Language has been added to more clearly meet these requirements. This update has been classified as “Required” by OSBA.

North Santiam School District

Code: GBA
Adopted: 2/26/98
Readopted: 11/17/05; 12/17/09; 10/19/17;
5/20/21; 9/15/22
Orig. Code: GBA

Equal Employment Opportunity

Equal employment opportunity and treatment shall be practiced by the district regardless of race¹, color, religion, sex, sexual orientation, gender identity, national origin, marital status, pregnancy, childbirth or a related medical condition, age, veterans’ status², service in a uniformed service, familial status, genetic information, an individual’s juvenile record that has been expunged, and disability if the employee, with or without reasonable accommodation, is able to perform the essential functions of the position.

The district administers preference in hiring or promotion decisions in accordance with Oregon law for applicants claiming preference as a veteran, disabled veteran, state servicemember or former state servicemember.

The superintendent will appoint an employee to serve as the officer in charge of compliance with the Americans with Disabilities Act and the Americans with Disabilities Act Amendments Act (ADA), and Section 504 of the Rehabilitation Act. The superintendent will also designate a Title IX coordinator to comply with the requirements of Title IX of the Education Amendments. The Title IX coordinator will investigate complaints communicated to the district alleging noncompliance with Title IX. The name, address and telephone number of the Title IX coordinator will be communicated~~provided~~ to all students, parents of students and employees through handbooks and will be published on the district website.

¹ Race also includes physical characteristics that are historically associated with race, including but not limited to natural hair, hair texture, hair type and protective hairstyles as defined by ORS 659A.001 ~~(as amended by House Bill 2935 (2021))~~.

² ~~The district grants a preference in hiring and promotion to veterans and disabled veterans. A veteran is eligible to use the preference any time when applying for a position at any time after discharge or release from service in the Armed Forces of the United States.~~

The superintendent will develop other specific recruitment, interview~~recruiting, interviewing~~ and evaluation procedures ~~as are~~ necessary to implement this policy. These procedures will seek to provide an equal employment opportunity and eliminate the effects of past and present discrimination[, intended or unintended, on the basis of race, religion, national origin, age, sex, marital status or physical or mental disabilities].

END OF POLICY

Legal Reference(s):

ORS 174.100	ORS 659A.003	ORS 659A.112
ORS 243.305	ORS 659A.006	ORS 659A.147
ORS 326.051	ORS 659A.009	ORS 659A.820
ORS 332.505	ORS 659A.029	
ORS 408.225 – 408.237	ORS 659A.030	OAR 581-021-0045
ORS 652.210 - 652.220	ORS 659A.082	OAR 581-022-2405
ORS 659.850	ORS 659A.109	OAR 839-006-0435 - 0480

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2024).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e, et. seq. (2024).

Age Discrimination in Employment Act of 1967, 29 U.S.C. §§ 621-634 (2024); 29 C.F.R Part 1626 (2025).

Age Discrimination Act of 1975, 42 U.S.C. §§ 6101-6107 (2024).

Equal Pay Act of 1963, 29 U.S.C. § 206(d) (2024).

Rehabilitation Act of 1973, 29 U.S.C. §§ 791, 794 (2024); 34 C.F.R. Part 104 (2025).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2024); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2020).

Americans with Disabilities Act/Americans with Disabilities Act Amendments Act, 42 U.S.C. §§ 12101-12213 (2024); 29 C.F.R. Part 1630 (2025); 28 C.F.R. Part 35 (2025).

The Vietnam Era Veterans' Readjustment Assistance Act of 1974, 38 U.S.C. § 4212 (2024).

Genetic Information Nondiscrimination Act of 2008, 42 U.S.C. § 2000ff-1 (2024).

Uniformed Services Employment and Reemployment Rights Act of 1994, 38 U.S.C. §§ 4301-4303, 4311 (2024).¶

Cross Reference(s):

AC - Nondiscrimination

ACA - Americans with Disabilities Act

Summary

The Oregon Legislature adopted HB 3007, outlining steps that must be taken when information regarding a student's concussion or other brain injury is provided to the district. The State Board of Education provided additional rules by adopting OAR 581-021-3007. OSBA is recommending replacing the existing policy with this version and removing the double code on JHCA/JHCB, making it JHCA Immunization, School Sports Participation, Concussions and Other Brain Injuries

North Santiam School District

Code: JHCA

PROPOSED NEW TO REPLACE EXISTING POLICY JHCA/JHCB

Adopted:

Immunization, School Sports Participation, Concussions and Other Brain Injuries**

If the board adopts this policy, delete JHCA/JHCB

Immunization

Proof of immunization must be presented at the time of initial enrollment¹ in school or within 30 days of transfer to the district in accordance with Oregon law. Proof consists of a signed Certificate of Immunization Status form documenting either evidence of immunization, non-medical exemption, and/or medical exemption, or immunity documentation.²

School Sports Participation

A student participating in extracurricular sports in grades 6 through 12 is required to submit to an appropriate School Sports Pre-Participation Examination³ prior to their initial participation in a related district program. The form⁴ is to be completed and signed by a parent or guardian giving permission for the student to participate, and be signed by a medical provider authorized by law⁵ who has examined and evaluated the student. The completed form(s) must be returned to the school office. A student who is subsequently diagnosed with a significant illness or has undergone major surgery is required to have a physical examination prior to further participation.

A student who continues to participate in extracurricular sports in grades 6 through 12 shall be required to complete a sports examination once every two years, thereafter.

Concussions and Other Brain Injuries

¹ The district shall immediately enroll a student experiencing homelessness in the school selected even if the student is unable to produce records normally required for enrollment.

² Documentation requirements for exemptions are outlined in ORS 433.267.

³ The required form is available at <https://www.osaa.org/governance/forms>, a copy may be obtained from a school office, or a form generated by the medical provider may be used if it meets requirements of law in OAR 581-021-0041.

⁴ The form may be used in either a hard copy or electronic format.

⁵ This physical examination must be conducted by a physician possessing an unrestricted license to practice medicine, a licensed naturopathic physician, a licensed physician assistant, a licensed nurse practitioner or a licensed chiropractic physician who has clinical training and experience in detecting cardiopulmonary diseases and defects.

A student who exhibits signs, symptoms or behaviors consistent with a concussion following an observed or suspected blow to the head or body, or who has been diagnosed with a concussion will not be allowed to participate in any athletic event or training on that day, unless an athletic trainer licensed by the Board of Athletic Trainers or a physician licensed pursuant to ORS 677.100 - 677.228 has determined the student has not suffered a concussion.⁶ Except as allowed above, a student excluded for concussion reasons will not be allowed to return to participate in an athletic event or training until the following three conditions have been met:

1. It is not the same day as the student exhibited signs, symptoms, or behaviors, experienced a blow to the head or body, or was diagnosed with a concussion;
2. The student no longer exhibits signs, symptoms, or behaviors consistent with a concussion; and
3. The student has received a medical release form from a **qualified** health care professional⁷.

Upon receipt of written notification⁸ from a parent or guardian that a student has been diagnosed with a concussion or other brain injury by a health care professional and that accommodations are being requested, the district shall follow all procedures developed by the Oregon Department of Education (ODE) to develop and implement an immediate and temporary accommodation plan.⁹ Written notice is not required for the district to begin following concussion protocols.

Any accommodations will be communicated to the parent or guardian, to all teachers who provide instruction to the student, and to other employees who have regular responsibilities for the student's supervision or health.¹⁰

Accommodations will be in effect no later than 10 school days after the written notification is received by the district and will be reviewed as needed, but no later than every two months.

END OF POLICY

Legal Reference(s):

[ORS 326.580](#)

[ORS 336.479](#)

[ORS 336.485 - 336.490](#)

[ORS 433.235 - 433.280](#)

⁶ For more information regarding medical releases for students in grades 9-12, see OSAA rules.

⁷ "Health care professional" includes a chiropractic physician, a naturopathic physician, a psychologist, a physical therapist, an occupational therapist, a physician assistant or a nurse practitioner who is licensed or registered under the laws of Oregon.

⁸ "Written notification" means a written notice from a parent or guardian, supported by medical documentation from a health care professional, informing the district that they are requesting an accommodation for a student who has been diagnosed with a concussion or other brain injury by a health care professional.

⁹ The district must use the sample form developed by ODE or a district form that includes all required content.

¹⁰ Including, but not limited to, school nurses, counselors, physical education teachers, coaches, athletic trainers and staff supervision recess or other physical activities.

[OAR 333](#)-019-0010

[OAR 333](#)-050-0010 - 050-0120

[OAR 581](#)-021-0041

[OAR 581](#)-021-3007

McKinney-Vento Homeless Assistance Act, Subtitle VII-B, reauthorized by Title IX-A of the Every Student Succeeds Act, 42 U.S.C. §§ 11431-11435 (2018). Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2018); Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2024). House Bill 3007 (2025)

North Santiam School District

Code: JHCA/JHCB
Adopted: 11/21/02
Revised/Readopted: 8/18/11; 9/18/14; 10/19/17
Orig. Code: JHCA/JHCB

Immunization, Physical Examinations, Vision Screening/Eye Examinations and Dental Screenings**

Sports Physicals

Students in grades 6 through 12 must have a physical examination performed by a physician possessing an unrestricted license to practice medicine, a licensed naturopathic physician, a licensed physician assistant, a certified nurse practitioner or a licensed chiropractic physician who has clinical training and experience in detecting cardiopulmonary diseases and defects, prior to participation in extracurricular sports. “Participation,” as used in this policy, means participation in sports practices and interscholastic sports competition.

Students who participate in extracurricular sports are required to have a physical examination every two years. The physical examination is the responsibility of the parents/students and is to be paid for by the parents/students. All students participating in athletic programs are required to submit to the district a School Sports Pre-participation Examination¹ form prior to their initial participation in a district athletic program. The form is to be completed and signed by a parent or guardian and physician giving permission for the student to participate.

The district may require a student have an additional physical examination if he/she has had an injury, surgery, diagnosis of a significant disease or illness in the past year.

Any participant who has an injury or illness and has been under the care of a physician must return a form signed by qualified, medical personnel before participation.

Immunizations

Proof of immunization must be presented prior to the time of initial enrollment in school or within 30 days of transfer to the district. Proof consists of a signed Certificate of Immunization Status form documenting either evidence of immunization or a religious, philosophical beliefs and/or medical exemption.² The building administrator/designee is authorized by the Oregon Health Authority to exclude any student from school attendance for noncompliance with State statutes and rules regarding immunization. The building administrator/designee will notify the parent or guardian in writing of the reason for the

¹ Form available at HYPERLINK “<http://www.osaa.org>” <http://www.osaa.org/governance/forms>

² Documentation requirements for exemptions are outlined in ORS 433.267.

exclusion, stating that the student will continue to be excluded until the student has complied with the requirements.

Vision Screening or Eye Examination

The parent or guardian of a student who is 7 years of age or younger and is beginning an education program with the district for the first time shall, within 120 days of beginning the education program, submit a certification that the student has received:

1. A vision screening or eye examination; and
2. Any further examination, treatments or assistance necessary.

The certification is not required if the parent or guardian provides a statement to the district that:

1. The student submitted a certification to a prior education provider; or
2. The vision screening or eye examination is contrary to the religious beliefs of the student or the parent or guardian of the student.

Dental Screening

The district shall file in the student's dental health record any dental screening certifications and any results of a dental screening known by the district. The district will provide to the parent or guardian of each student, standardized information developed by the Oregon Health Authority's dental director regarding dental screenings, further examinations or necessary treatments and preventative care including fluoride varnish, sealants and daily brushing and flossing.

The parent or guardian of a student who is 7 years of age or younger and is beginning an education program with the district for the first time, shall submit a certification within 120 days of beginning the education program, that the student has received a dental screening within the previous 12 months.

The certification is not required if the parent or guardian provides a statement to the district that:

1. The student submitted a certification to a prior education provider;
2. The dental screening is contrary to the religious beliefs of the student or the parent or guardian of the student; or
3. The dental screening is a burden for the student or the parent or guardian of the student in the following ways:
 - a. The cost of obtaining the dental screening is too high;
 - b. The student does not have access to an approved screener;
 - c. The student was unable to obtain an appointment with an approved screener.

The certification may be provided by a licensed dentist, a dental hygienist or a health care practitioner as defined by state law. The certification must include the:

1. Student's name;
2. Date of screening; and
3. Name of entity conducting the dental screening.

The district shall submit to the Oregon Department of Education a report that identifies the percentage of students who failed to submit the certification for the previous year, no later than October 1 of each year.

The notice will also inform the parent or guardian that a hearing will be afforded upon request by the Oregon Health Authority.

END OF POLICY

Legal Reference(s):

ORS 326.580	ORS 433.235 to -433.280	OAR 581-021-0017
ORS 336.211		OAR 581-021-0031
ORS 336.213	OAR 333-019-0010	OAR 581-021-0041
ORS 336.479	OAR 333-050-0010 to -0120	OAR 581-022-0705

OREGON SCHOOL ACTIVITIES ASSOCIATION, OSAA HANDBOOK.

Summary

OSBA has updated this policy to incorporate legal requirements into a set of steps boards can follow in order to fill the vacancy. They recommend deleting the district's existing version and replacing it with this one.

North Santiam School District

Code: BBE
Adopted:

Vacancies on the Board

(delete current version and replace with this one)

Vacancies on the Board will be filled through the following procedures:

1. At a Board meeting, the Board will declare the vacancy¹;
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 reopen the application period at any time;
3. After the application period ends, 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, if the position is zoned;
 - 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;

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 district. (Oregon law allows a board member to finish out their elected term if their residential zone boundaries are changed or if they moved to another location within the district, rather than triggering an immediate mandatory vacancy.)

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.

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 votes³, the Board may re-vote or vote to re-open the application period;
7. The newly appointed Board member(s) 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 district election, at which time voters will elect a candidate to either complete the unexpired term or begin a new full term, depending on the position's⁴ original cycle.

If the offices of a majority of Board members are vacant at the same time, the directors of the Willamette 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](#)

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.

⁴ If the original term still has 2 years left on it after June 30, voters will elect someone to fill **only those remaining 2 years**. This ensures the board's staggered rotation schedule stays aligned.

North Santiam School District

Code: BBE
Adopted: 7/01/96
Revised/Readopted: 6/23/97; 8/21/03; 7/18/13;
6/15/17
Orig. Code: BBE

Vacancies on the Board

(Version 1)

See updated version.

Vacancies will be filled through Board appointment. The Board appointee must be a legally registered voter, a resident within the district for one year immediately preceding the appointment,

All vacancies will be announced to the public prior to filling the position. If the vacancy is not an at-large position and occurs in a specific zone, the Board shall advertise for a 20-day period in an attempt to find an eligible resident from within the same zone that qualifies. If an eligible zone resident cannot be found that meets all qualifications as stated above, the Board shall appoint an eligible “at-large” residents of the district to fill the vacancy.

In the event of multiple vacancies, the position vacated first will be filled first.

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 Willamette Education Service District shall appoint persons to fill the vacancies from qualified district voters.

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 the spring of that year will fill the remaining portion of an incomplete 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 remaining year(s) of the term of office of the board member being replaced.

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](#)

Cross Reference(s):

BBBA - Board Member Qualifications
BBD - Board Member Removal from Office

Summary

There have been several changes to Oregon Public Meetings laws over the last few years. These include statutes from the Oregon Legislature and rules from the Oregon Government Ethics Commission.

North Santiam School District

Code: BDDG

Adopted:

Recordings and Minutes of Board Meetings

(delete current version and replace with this one)

¹The Board will ensure a ²recording is made of all of its meetings and portions of meetings that are not held in executive session. These recordings will be posted on the district's website within seven days following the meeting.

A video or audio recording of a meeting can be kept as the official record as long as all required content is included and it is kept in an allowable format³. Alternatively, the district may create written minutes. Written minutes do not need to be a verbatim transcript and can be kept in hard copy or electronic form⁴.

The official record must give a true reflection of the matters discussed at the meeting and the views of the participants, and must include the following information:

1. All members of the Board present;
2. All motions, proposals, resolutions, orders, ordinances, and measures proposed and their disposition;
3. The results of all votes and the vote of each member by name for all actions taken⁵;
4. The substance of any discussion on any matter; and
5. A reference to any document discussed at the meeting.

¹ ORS 192.655 requires districts with an ADMr of 50 or more to record board meetings, and post the recording within seven days.

² If the district lacks broadband internet, an audio recording is sufficient. See ORS 192.655.

³ Oregon Administrator Rule (OAR) 166-017-0045(4) requires moving images or audio recordings be kept in MP2, MP3, MP4, or WAVE formats.

⁴ Oregon Administrator Rule (OAR) 166-017-0045(4) requires textual data or still images be kept in XML, ODT, TXT, PDF, RTF, PREG, JFIF, PNG, or TIFF formats.

⁵ If minutes are kept in a recorded form, all voting will use a roll call vote and if minutes are kept in written form the minutes will identify the vote of each member by name under each board action.

If written minutes are created for meetings that do not take place in executive session, those minutes shall be available to the public within a reasonable time after the meeting. These minutes will be published to the district website and may be requested from the district office.

Recordings or minutes⁶ of executive sessions will be kept in the same manner as other meetings of the Board. If disclosure of material from executive session recordings or minutes would be inconsistent with the purpose for which the executive session was held under Oregon Revised Statute (ORS) 192.660, the material may be withheld from disclosure. Executive session minutes of a hearing held under ORS 332.061 shall contain only material not excluded under ORS 332.061(2), and information⁷ will not be disclosed in accordance with ORS 332.061.

Either the recording or minutes of Board meetings will be kept permanently. If written minutes are created for any meetings of the Board, any recordings will be kept for at least one year after the minutes are created.

END OF POLICY

Legal Reference(s):

[ORS 192.610 - 192.705](#)

[ORS 332.061](#)

[OAR 166-017-0005 - 0095](#)

[OAR 166-400-0010\(9\)](#)

[OAR 199-050-0060](#)

Attorney General's PUBLIC RECORDS AND MEETINGS MANUAL.

⁶ "...a record of any executive session may be kept in the form of a sound or video tape or digital recording, which need not be transcribed unless otherwise provided by law." ORS 192.650(2)

⁷ ORS 332.061 prohibits the disclosure of:

1. The name of the minor student;
2. The issue, including a student's confidential records;
3. The discussion; and
4. The school board member's vote on the issue.

North Santiam School District

Code: BDDG
Adopted: 7/01/96
Readopted: 7/17/97; 6/15/17
Orig. Code: BDDG/BDDK

Minutes of Board Meetings

See updated version.

School Boards and their Board appointed committees must provide for the taking of written minutes at all meetings. The written minutes must give a true reflection of the matters discussed at the meeting and the views of the participants.

All minutes should include at least the following information:

1. All members present;
2. All motions, proposals, resolutions, orders proposed and their disposition;
3. The substance of any discussions on any matters;
4. The results of all votes and the vote of each member by name unless the vote was unanimous.

The public and patrons of the district may receive copies of minutes upon request at the administration office during regular business hours. A copy of the minutes of each regular and special Board meeting as they are drafted for approval will be distributed after such meeting to each Board member and administrator.

The district will maintain a hard copy¹ of the meeting minutes and make available to staff and other interested patrons.

Minutes of executive sessions will be kept in accordance with the requirements of Oregon's Public Meetings Law with essentially the same level of detail as for public sessions. If disclosure of material in the executive session minutes would be inconsistent with the purpose for which executive session was held under Oregon Revised Statute (ORS) 192.660, the material may be withheld from disclosure.

If an executive session is held pursuant to ORS 332.061, the following shall not be made public: the name of the minor student; the issue, including a student's confidential medical records and that student's educational program; the discussion; and each Board member's vote on the issue.

END OF POLICY

Legal Reference(s):

¹ Oregon Administrative Rule 166-400-0010(9)

[ORS 192.610 - 192.705](#)
[ORS 332.061](#)

[OAR 166-017-0005 - 0095](#)
[OAR 166-400-0010\(9\)](#)

[OAR 199-050-0060](#)

Attorney General's PUBLIC RECORDS AND MEETINGS MANUAL.

E

L

E

T

E

Summary

Multiple laws address sexual harassment in Oregon schools. Oregon laws include requirements to provide notice to individuals involved in reports of sexual harassment. This update is to clarify these notice requirements.

North Santiam School District

Code: GBN/JBA
Adopted: 7/21/16
Readopted: 10/19/17; 11/19/20; 6/17/21;
6/20/24
Orig. Code: GBN/JBA

Sexual Harassment

The district is committed to eliminating sexual harassment. Sexual harassment will not be tolerated in the district. All students, staff members and other persons are entitled to learn and work in an environment that is free of harassment. All staff members, students and third parties are subject to this policy. Any person may report sexual harassment.

The district processes complaints or reports of sexual harassment under Oregon Revised Statute (ORS) 342.700 et. al. and federal Title IX laws found in Title 34 C.F.R. Part 106. Individual complaints may require both of these procedures, and may involve additional complaint procedures.

General Procedures

When information, a report or complaint regarding sexual harassment is received by the district, the district will review such information, report or complaint to determine which law applies and will follow the appropriate procedures. When the alleged conduct could meet both of the definitions in ORS Chapter 342 and Title IX, both complaint procedures should be processed simultaneously (*see* GBN/JBA-AR(1) - Sexual Harassment Complaint Procedure and GBN/JBA-AR(2) - Federal Law (Title IX) Sexual Harassment Complaint Procedure). The district may also need to use other complaint procedures when the alleged conduct could meet the definitions for other complaint procedures

Oregon Definition and Procedures

Oregon Definition

Sexual harassment of students, staff members or third parties¹ shall include:

1. A demand or request for sexual favors in exchange for benefits;
2. Unwelcome conduct of a sexual nature that is physical, verbal, or nonverbal and that:

¹ “Third party” means a person who is not a student or a school or district staff member and who is: 1) on or immediately adjacent to school grounds or district property; 2) at a school-sponsored activity or program; or 3) off school grounds or district property if a student or a school or district staff member acts toward the person in a manner that creates a hostile environment for the person while on school or district property, or at a school- or district-sponsored activity.

- a. Interferes with a student’s educational activity or program;
- b. Interferes with a school or district staff member’s ability to perform their job; or
- c. Creates an intimidating, offensive, or hostile environment.

3. Assault when sexual contact occurs without consent².³

Sexual harassment does not include conduct that is necessary because of a job duty of a school or district staff member or because of a service required to be provided by a contractor, agent, or volunteer, if the conduct is not the product of sexual intent or a person finding another person, or another person’s actions, offensive because of that other person’s sexual orientation or gender identity.

Examples of sexual harassment may include, but not be limited to, physical touching or graffiti of a sexual nature; displaying or distributing of sexually explicit drawings; pictures and written materials; sexual gestures or obscene jokes; touching oneself sexually or talking about one’s sexual behaviors in front of others; or spreading rumors about or rating other students or others as to appearance, sexual activity or performance

Oregon Procedures

Reports and complaints of sexual harassment should be made to the following individual(s):

Name	Position	Phone	Email
Danielle Blackwell	Director of Human Resources	503-769-6924	danielle.blackman@nsantiam.k12.or.us

This individual is responsible for accepting and managing complaints of sexual harassment. Persons wishing to report should contact them using the above information. This person is also designated as the Title IX coordinator. *See* GBN/JBA-AR(1) - Sexual Harassment Complaint Procedure.

Response

Any staff member who becomes aware of behavior that may violate this policy shall immediately report to a district official. The district official (with coordination involving the reporting staff member when appropriate) will take any action necessary to ensure the:

1. Student is protected and to promote a nonhostile learning environment;
2. Staff member is protected and to promote a nonhostile work environment; or
3. Third party who is subjected to the behavior is protected and to promote a nonhostile environment.

This includes providing resources for support measures to the student, staff member or third party who was subjected to the behavior and taking any actions necessary to remove potential future impact on the student,

² “Without consent” means an act performed: (a) without the knowing, voluntary and clear agreement by all parties to participate in the specific act; or (b) when a person who is a party to the act is incapacitated by drugs or alcohol; unconscious; or pressured through physical force, coercion or explicit or implied threats to participate in the act.

³ The statutory definition (ORS 342.704) for sexual harassment includes separate definitions with slightly different language for students, staff members and third parties. The language used in this policy comes from OAR 581-021-0038(1).

staff member or third party, but are not retaliatory against the student, staff member or third party being harassed or the person who reported to the district official.

Any student or staff member who feels they are a victim of sexual harassment are encouraged to ~~immediately~~ report their concerns to district officials, this includes officials such as the principal, compliance officer or superintendent. Students may also report concerns to a teacher, counselor or school nurse, who will promptly notify the appropriate district official.

Investigation

All reports and complaints about behavior that may violate this policy shall be investigated. The district may use, but is not limited to, the following means for investigating incidents of possible harassment:

1. Interviews with those involved;
2. Interviews with witnesses;
3. Review of video surveillance;
4. Review of written communications, including electronic communications;
5. Review of any physical evidence; and
6. Use of third-party investigator

The district will use a reasonable person standard when determining whether a hostile environment exists. A hostile environment exists if a reasonable person with similar characteristics and under similar circumstances would consider the conduct to be so severe as to create a hostile environment

The district may take, but is not limited to, the following procedures and remedial action to address and stop sexual harassment:

1. Discipline of staff and students engaging in sexual harassment;
2. Removal of third parties engaged in sexual harassment;
3. Additional supervision in activities;
4. Additional controls for district electronic systems;
5. Trainings and education for staff and students; and
6. Increased notifications regarding district procedures and resources

When a student or staff member is harassed by a third party, the district will consider the following:

1. Removing that third party's ability to contract or volunteer with the district, or be present on district property;

2. If the third party works for an entity that contracts with the district, communicating with the third party's employer;
3. If the third party is a student of another district or school, communicate information related to the incident to the other district or school;
4. Limiting attendance at district events; and
5. Providing for additional supervision, including law enforcement if necessary, at district events

No Retaliation

Retaliation against persons who initiate complaint or otherwise report sexual harassment or who participate in an investigation or other related activities is prohibited. The initiation of a complaint, reporting of behavior, or participation in an investigation, in good faith about behavior that may violate this policy may not adversely affect the:

1. Educational assignments or educational environment of a student or other person initiating the complaint, reporting the behavior, or participating in the investigation; or
2. Any terms or conditions of employment or of work or educational environment of a school or district staff member or other person initiating the complaint, reporting the behavior, or participating in the investigation.

Students who initiate a complaint or otherwise report harassment covered by the policy or who participate in an investigation may not be disciplined for violations of the district's drug and alcohol policies that occurred in connection with the reported prohibited conduct and that were discovered because of the report or investigation, unless the student gave another person alcohol or drugs without the person's knowledge and with the intent of causing the person to become incapacitated and vulnerable to the prohibited conduct.

Notices

When a person⁴ who may have been affected by this policy files a complaint or otherwise reports behavior that may violate the policy, the district shall provide written notification to the following:

1. Each reporting person;
2. If appropriate, any impacted person who is not a reporting person;
3. Each reported person; and
4. Where applicable, a parent or legal guardian of a reporting person, impacted person, or reported person.

The written notification must include⁵:

⁴ Student, staff member, or third party, or if applicable, the student or third party's parent. If the person is a minor, the district should consider when to contact the person's parent.

⁵ Remember-confidentiality laws when providing any information.

1. Name and contact information for all persons designated by the district to receive complaints;
2. The rights of the person that the notification is going to;
3. Information about the internal complaint processes available through the school or district that the person who filed the complaint may pursue, including the person designated for the school or district for receiving complaints and any timelines;
4. Notice that civil and criminal remedies that are not provided by the school or district may be available to the person through the legal system and that those remedies may be subject to statutes of limitation;
5. Information about services available to the student or staff member through the school or district, including any counseling services, nursing services or peer advising;
6. Information about the privacy rights of the person and legally recognized exceptions to those rights for internal complaint processes and services available through the school or district;
7. Information about, and contact information for, services and resources that are available to the person, including but not limited to:
 - a. For the reporting person, state and community-based resources for persons who have experienced sexual harassment; or
 - b. For the reported persons, information about and contact information for state and community-based mental health services.
8. Notice that students who report about possible prohibited conduct and students who participate in an investigation under this policy may not be disciplined for violations of the district's drug and alcohol policies that occurred in connection with the reported prohibited conduct and that were discovered as a result of a prohibited conduct report or investigation unless the student gave another person alcohol or drugs without the person's knowledge and with the intent of causing the person to become incapacitated and vulnerable to the prohibited conduct; and
9. Prohibition of retaliation.

~~Notification, to the extent allowable under state and federal student confidentiality laws, must be provided when the investigation is initiated and concluded. The notification at the conclusion must include whether a violation of the policy was found to have occurred.¶~~

The notice must:

1. Be written in plain language that is easy to understand;
2. Use print that is of a color, size and font that allows the notification to be easily read; and
3. Be made available to students, students' parents, staff members and member of the public at each office, at the district office and on the website of the school or district.

Additionally, notice must be provided to the person who initiated the complaint and, if applicable, the person's parents, when an investigation is initiated and when it is concluded. The notification at the conclusion of the

investigation must include whether a violation of the policy was found to have occurred, to the extent allowable under state and federal student confidentiality laws.

Oregon Department of Education (ODE) Support

The ODE will provide technical assistance and training upon request

Federal Definition and Procedures

Federal Definition

Sexual harassment means conduct on the basis of sex that satisfies one or more of the following:

1. An employee of the district conditioning the provision of an aid, benefit, or service of the district on an individual's participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the district's education program or activity⁶;
3. "Sexual assault": an offense classified as a forcible or nonforcible sex offense under the uniform crime reporting system of the Federal Bureau of Investigation;
4. "Dating violence": violence committed by a person who is or has been in a social relationship of a romantic or intimate nature with the victim and where the existence of such a relationship shall be determined based on a consideration of the length of the relationship, the type of relationship and the frequency of interaction between the persons involved in the relationship;
5. "Domestic violence": felony or misdemeanor crimes of violence committed by a current or former spouse or intimate partner of the victim, by a person with whom the victim shares a child in common, by a person who is cohabitating with or has cohabitated with the victim as a spouse or intimate partner, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person's acts under the domestic or family violence laws of the jurisdiction; or
6. "Stalking": engaging in a course of conduct directed at a specific person that would cause a reasonable person fear for the person's own safety or the safety of others, or suffer substantial emotional distress.

This definition only applies to sex discrimination occurring against a person who is a subject of this policy in the United States. A district's treatment of a complainant or a respondent in response to a formal complaint of sexual harassment may constitute discrimination on the basis of sex under Title IX.

Federal Procedures

The district will adopt and publish grievance procedures that provide for the prompt and equitable resolution of the student and employee complaints alleging any action that would be prohibited by this policy. *See* GBN/JBA-AR(2) - Federal Law (Title IX) Sexual Harassment Complaint Procedure.

⁶ "Education program or activity" includes locations, events, or circumstances over which the recipient exercised substantial control over both the respondent and the context in which the sexual harassment occurs." (Title 34 C.F.R. § 106.44(a))

Reporting

Any person may report sexual harassment. This report may be made in person, by mail, by telephone, or by electronic mail, or by any other means that results in the Title IX coordinator receiving the person's verbal or written report. The report can be made at any time.

Danielle Blackwell is designated as the Title IX coordinator and can be contacted at 503-769-6924. The Title IX coordinator will coordinate the district's efforts to comply with its responsibilities related to this AR. The district prominently will display the contact information for the Title IX coordinator on the district website and in each handbook

Response

The district will promptly respond to information, allegations or reports of sexual harassment when there is actual knowledge of such harassment, even if a formal complaint has not been filed.⁷ The district shall treat complainants and respondents equitably by providing supportive measures⁸ to the complainant and by following a grievance procedure⁹ prior to imposing any disciplinary sanctions or other actions that are not supportive measures against a respondent. The Title IX coordinator is responsible for coordinating the effective implementation of supportive measures.

The Title IX coordinator must promptly contact the complainant to discuss the availability of supportive measures, consider the complainant's wishes, with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint.¹⁰

If after an individualized safety and risk analysis, it is determined that there is an immediate threat to the physical health or safety of any person, an emergency removal of the respondent can take place.¹¹ The district must provide the respondent with notice and an opportunity to challenge the decision immediately following the removal. A non-student employee may also be placed on non-disciplinary administrative leave pending the grievance process.

⁷ (Title 34 C.F.R. § 106.44(a)) Response cannot be deliberately indifferent. A recipient is deliberately indifferent only if its response to sexual harassment is clearly unreasonable in light of the known circumstances.

⁸ (Title 34 C.F.R. § 106.44(a)) Supportive measures means non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures are designed to restore or preserve equal access to the recipient's education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the district's educational environment, or deter sexual harassment. The district must maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of the recipient to provide supportive measures. (Title 34 C.F.R. § 99.30(a))

⁹ This grievance procedure must meet the requirements of Title 34 C.F.R. § 106.45 (included in accompanying administrative regulation, *see* GBN/JBA-AR(2) - Federal Law (Title IX) Sexual Harassment Complaint Procedure).

¹⁰ The Title IX coordinator may also discuss that the Title IX coordinator has the ability to file a formal complaint.

¹¹ The district may still have obligations under Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973 or the American with Disabilities Act (ADA). (Title 34 C.F.R. § 106.44(c))

Notice

The district shall provide notice to all applicants for admission and employment, students, parents or legal guardians, employees, and all unions or professional organizations holding collective bargaining or professional agreements with the district of the following:

1. The name or title, office address, electronic mail address, and telephone number of the Title IX coordinator(s);
2. That the district does not discriminate on the basis of sex in the education program or activity that it operates, as required by Title IX. This includes admissions and employment; and
3. The grievance procedure and process, how to file a formal complaint of sex discrimination or sexual harassment, and how the district will respond.

Inquiries about the application to Title IX and its requirements may be referred to the Title IX coordinator or the Assistant Secretary¹², or both

No Retaliation

Neither the district or any person may retaliate¹³ against an individual for reporting, testifying, providing evidence, being a complainant, otherwise participating or refusing to participate in any investigation or process in accordance with this procedure. The district must keep confidential the identity of parties and participating persons, except as disclosure is allowed under Family Educational Rights and Privacy Act (FERPA), as required by law, or to carry out the proceedings herein. Complaints of retaliation may be filed using these procedures.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a grievance proceeding does not constitute retaliation.

Publication

This policy shall be made available to students, parents of students and staff members. This policy and contact information for the Title IX coordinator shall be prominently published in the district student handbook and on the district website. This policy shall also be made available at each school office and at the district office. The district shall post this policy on a sign in all grade 6 through 12 schools, on a sign that is at least 8.5 inches by 11 inches in size. A copy of the policy will be made available to any person upon request.

END OF POLICY

Legal Reference(s):

¹² Of the United States Department of Education.

¹³ Retaliation includes, but is not limited to, intimidation, threats, coercion, and discrimination.

[ORS 243.706](#)
[ORS 332.107](#)
[ORS 342.700](#)
[ORS 342.704](#)
[ORS 342.708](#)

[RS 342.850](#)
[RS 342.865](#)
[RS 659.850](#)
[RS 659A.006](#)
[RS 659A.029](#)

[RS 659A.030](#)
[AR 581-021-0038](#)
[AR 584-020-0040](#)
[AR 584-020-0041](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2020).

Bartsch v. Elkton School District, FDA-13-011 (March 27, 2014).

Davis v. Monroe County Bd. of Educ., 526 U.S. 629 (1999).

Gebser v. Lago Vista Indep. Sch. Dist., 524 U.S. 274 (1998). ¶

Cross Reference(s):

AC - Nondiscrimination

ACB - All Students Belong

GBNA - Hazing/Harassment/Intimidation/Bullying/Menacing/Cyberbullying – Staff

JBA/GBN - Sexual Harassment

JFCF - Harassment/Intimidation/Bullying/Cyberbullying/Teen Dating Violence/Domestic Violence – Student

JHFE - Reporting of Suspected Abuse of a Child

JHFF - Reporting Requirements Regarding Sexual Conduct with Students

Oct 2026 Field Trip Report

Overnight & out-of-state trips are indicated in red.

Trip ID/Name	Trip Destination	Building	Trip Date(s)	Depart & Return Times	Pupils	Adults	Educational Objectives	Status
272241 - Sub Life Skills Oregon Zoo Trip	Oregon Zoo, 4001 SW Canyon Rd, Portland	Sublimity	Fri, May 21, 2027	8:30am - 2:00pm	10	6	Researching animals for writing assignments. Social skills practice.	pending
275920 - SubM 8th grade to SHS CTE	SHS 757 W Locust St, Stayton	Sublimity	Tue, Feb 16, 2027	1:00pm - 2:30pm	41	2	8th grade visiting SHS CTE program to see what classes SHS has to offer.	pending
272242 - Sub Life Skills Downtown Stayton	Stayton Post Office, and Lovin' Oven	Sublimity	Thu, Dec 17, 2026	12:45pm - 2:15pm	10	6	Life Skills practice - mailing letters	pending
275506 - Sublimity 3rd Grade to A-DEC	A-DEC 2601 E Crestview Dr, Newberg	Sublimity	Wed, Dec 9, 2026	8:15am - 2:30pm	40	10	Students will learn about different jobs, force and motion related to tools and products and personal hygiene and healthy foods.	pending
274800 - Boys Basketball Fall Retreat	location TBA Rhododendron, OR	Stayton High	Fri, Nov 20 - Sun, Nov 22, 2026	3:30 pm & 12:00 pm	10	3	Team bonding	pending
275794 - Nike Regionals	The Course (NXR) 2520 N Flora Rd, Spokane Valley, WA	Stayton High	Fri, Nov 20 - Sun, Nov 22, 2026	7:30am & 4:00pm	21	5	Athletic competition	pending
273774 - SIS 4th Gr to EZ Orchards	EZ Orchards 5504 Hazelgreen Rd NE, Salem	Stayton Middle	Thu, Oct 29, 2026	8:15am - 11:15am	75	24	Students can observe pumpkins at various stages of growth, from the vine to the harvest and learn how internal and external structures of plants help them survive, grow, and reproduce.	approved 109
275383 - Sublimity Kindergarten & 1st Gr to Pumpkin Patch	EZ Orchards 5504 Hazelgreen Rd NE, Salem	Sublimity	Mon, Oct 26, 2026	9:45am - 12:45pm	78	26	Students will learn about the life cycle of apples and pumpkins. Prior to the trip, classrooms will have pumpkin life cycle and/or plant life cycle units that will directly correlate to the activities that students will get to experience on the field trip.	pending
275174 - SES 3rd Grade EZ Orchard	EZ Orchards 5504 Hazelgreen Rd NE, Salem	Stayton Elementary	Fri, Oct 23, 2026	11:30am - 2:00pm	85	25	This field trip is related to classroom life science standard (plant life cycles).	pending
275450 - Voices for Change & Leadership Conference	Western Oregon Univ 345 Monmouth Ave, Monmouth	Stayton High	Fri, Oct 23, 2026	7:15am - 4:00pm	30	4	Leadership Conference	pending
273323 - Kindergarten to Pumpkin Patch	Greens Bridge Farms 3730 Jefferson Scio Dr Jefferson	Stayton Elementary	Mon, Oct 19, 2026	9:30am - 1:45pm	100	75	Students will observe how pumpkins grow and identify characteristics of pumpkins, plants, and other crops and explore textures, smells, sounds, and other sensory experiences found on a farm.	pending
274060 - SES Stayton Walking Field Trip	Stayton Post Office, Stayton Library, Star Cinema, Brown House, Police Station, Pioneer Park	Stayton Elementary	Fri, Oct 16, 2026	8:45am - 2:15pm	80	25	Students will be able to gain first-hand knowledge of the historical sites in their community and how they work to support the members of the community.	approved

275038 - SHS to Cascade College Fair	Cascade High School 10226 Marion Rd SE, Turner	Stayton High	Wed, Oct 14, 2026	12:15pm - 1:50pm	60	4	To expose students to a diverse range of higher education options—including community colleges, public and private universities, and trade schools—allowing them to compare institutional offerings, campus cultures, and degree programs.	approved
275531 - SUB Geology Museum Visit	Rice NW Museum of Rocks & Minerals 26385 NW Groveland Dr, Hillsboro	Sublimity	Wed, Oct 14, 2026	8:45am - 1:30pm	48	7	Students will apply their understanding of geology by examining real-world rocks, minerals, fossils, and petrified wood at the Rice Northwest Museum. Students will identify evidence of rock and mineral formation, fossilization, the rock cycle, and geologic time, while connecting museum specimens to how scientists use Earth materials to interpret Earth's history.	pending
274975 - ML-K-2-Greensbridge Pumpkin Patch	Greens Bridge Farms 3730 Jefferson Scio Dr Jefferson	Mari-Linn	Tue, Oct 13, 2026	10:00am - 2:00pm	55	23	Use observations to describe patterns of what plants and animals (including humans) need to survive. Make observations to construct an evidence-based account that young plants and animals are like, but not exactly like, their parents	approved
272240 - Life Skills Silver Creek Falls Outing	Silver Creek Falls 20024 Silver Falls Hwy SE, Sublimity	Stayton High	Thu, Oct 8, 2026	10:45am - 2:30pm	13	5	Observing nature	approved
275040 - SHS to Harris Thermal & ARE Manufacturing	Harris Thermal: 615 S Springbrook Rd, Newberg A.R.E. Manufacturing: 518 S Springbrook Rd, Newberg	Stayton High	Thu, Oct 8, 2026	7:45am - 1:45pm	10	1	To show students and the public what modern manufacturing is all about from fabrication, machining, design and all of the operations in between.	approved 110
275009 - FFA District Soils	Meadowood Dairy 4900 Cook Rd SE, Turner	Stayton High	Fri, Oct 2, 2026	7:30am - 3:00pm	14	1	Students will participate in FFA Soil Judging to apply classroom knowledge of soil properties, including texture, structure, color, depth, and land-use characteristics, to real-world soil profiles.	approved
275041 - SHS to GK Machine	GK Machine 20495 Butteville Rd NE Bldg 1, Hubbard	Stayton High	Thu, Oct 1, 2026	12:00pm - 3:00pm	20	1	To show students and the public what modern manufacturing is all about from fabrication, machining, design and all of the operations in between.	approved
274061 - SubE- grade 3 EZ orchards and Blueberry farm field trip	EZ Orchards 5504 Hazelgreen Rd NE, Salem Pacific blueberry company (PBC): 6826 55th Ave NE, Salem	Sublimity	Thu, Oct 1, 2026	8:45am - 2:00pm	40	10	Students will use a map and Oregon geography skills to navigate the corn maze at EZ orchards as well as learning about local agriculture and jobs. Then they will learn about the blueberry packing industry and get to experience a working blueberry farm first hand.	approved
274726 - SUB-E Walking Community Field Trip	K's Coffee, Fire Station, Dentist, Post Office, Panzanellies	Sublimity	Wed, Sep 30, 2026	12:30pm - 2:30pm	38	15	Understand community features and community helpers.	approved
273131 - Sublimity OMSI Camp Gray Outdoor School	Coastal Discovery Center at Camp Gray 3400 SW Abalone St, South Beach	Sublimity	Wed, Sep 30- Fri, Oct 2, 2026	10:00am & 2:00pm	45	14	Students will explore coastal ecosystems through hands-on investigations at OMSI's Coastal Discovery Center. They will observe interactions between organisms and their environment, analyze how environmental factors influence ecosystems, and use evidence from their observations to explain how changes can impact coastal ecosystems.	approved

274008 - FFA District Leadership Camp	Aldergate 7790 Marion Rd SE, Turner	Stayton High	Sun, Sep 27-Mon, Sep 28, 2026,	9:00am & 2:00pm	14	1	Team bonding, Skills building	approved
268573, 268572, 268571 & 268570 - Outdoor School day trippers	Camp Tadmor 43943 McDowell Creek Drive, Lebanon	Stayton Middle	Mon-Thu, Sep 21-24, 2026	8:15am - 2:30pm	4	2	Students learn about place-specific ecosystems, including the interrelationships between living and nonliving components learn about their impact on the community and the environment. To foster personal growth by taking students out of their comfort zones and away from their typical social cliques.	approved
268569 - SMS Outdoor School students	Camp Tadmor 43943 McDowell Creek Drive, Lebanon	Stayton Middle	Mon-Fri, Sep 21-25, 2026	9:00am & 1:45pm	95	4	Students learn about place-specific ecosystems, including the interrelationships between living and nonliving components learn about their impact on the community and the environment. To foster personal growth by taking students out of their comfort zones and away from their typical social cliques.	approved
268567 - SMS Outdoor School Counselors	Camp Tadmor 43943 McDowell Creek Drive, Lebanon	Stayton High	Sun-Fri, Sep 20-25, 2026	3:00pm & 2:15pm	20	2	Counselors for students attending ODS	approved
274929 - SubM 8th-HomeComing parade	SHS 757 W Locust St, Stayton	Sublimity	Fri, Sep 18, 2026	1:20pm - 2:30pm	41	3	Building connections for high school for 8th graders.	approved
273757 - Mari Linn 8th Graders to Homecoming Parade	SHS 757 W Locust St, Stayton	Mari-Linn	Fri, Sep 18, 2026	1:15pm - 2:30pm	23	2	Building connections for high school for 8th graders.	approved

October 2026 NSSD Enrollment Totals												
School Name	Grade	Jun '26	Sept '26	Oct '26	Nov '26	Dec '26	Jan '27	Feb '27	Mar '27	Apr '27	May '27	Jun '27
MARI-LINN	KG	22	13	13								
MARI-LINN	1	13	23	23								
MARI-LINN	2	16	16	16								
MARI-LINN	3	22	16	16								
MARI-LINN	4	23	23	23								
MARI-LINN	5	12	27	26								
MARI-LINN	6	20	13	13								
MARI-LINN	7	20	17	17								
MARI-LINN	8	15	23	22								
MARI-LINN	ALL	163	171	169	0	0	0	0	0	0	0	0
SUBLIMITY	KG	37	38	38								
SUBLIMITY	1	38	40	40								
SUBLIMITY	2	39	38	38								
SUBLIMITY	3	45	40	40								
SUBLIMITY	4	48	49	49								
SUBLIMITY	5	42	51	51								
SUBLIMITY	6	59	48	47								
SUBLIMITY	7	42	57	57								
SUBLIMITY	8	52	41	40								
SUBLIMITY	ALL	402	402	400	0	0	0	0	0	0	0	0
OA-VIRTUAL ACADEMY	KG	0	0	0								
OA-VIRTUAL ACADEMY	1	0	0	0								
OA-VIRTUAL ACADEMY	2	0	0	0								
OA-VIRTUAL ACADEMY	3	1	0	0								
OA-VIRTUAL ACADEMY	4	1	1	1								
OA-VIRTUAL ACADEMY	5	0	0	0								
OA-VIRTUAL ACADEMY	6	1	0	0								
OA-VIRTUAL ACADEMY	7	3	3	3								
OA-VIRTUAL ACADEMY	8	6	1	3								
OA-VIRTUAL ACADEMY	9	5	3	3								
OA-VIRTUAL ACADEMY	10	11	3	5								
OA-VIRTUAL ACADEMY	11	19	6	8								
OA-VIRTUAL ACADEMY	12	17	16	16								
OA-VIRTUAL ACADEMY	ALL	64	33	39	0	0	0	0	0	0	0	0

School Name	Grade	Jun '26	Sept '26	Oct '26	Nov '26	Dec '26	Jan '27	Feb '27	Mar '27	Apr '27	May '27	Jun '27
STAYTON ELEMENTARY	PreK	28	30	32								
STAYTON ELEMENTARY	KG	78	78	77								
STAYTON ELEMENTARY	1	86	79	80								
STAYTON ELEMENTARY	2	79	90	91								
STAYTON ELEMENTARY	3	74	83	84								
STAYTON ELEMENTARY	ALL	317	330	332	0	0	0	0	0	0	0	0
STAYTON INTERMEDIATE	4	78	75	75								
STAYTON INTERMEDIATE	5	91	79	80								
STAYTON MIDDLE	6	90	96	97								
STAYTON MIDDLE	7	98	96	97								
STAYTON MIDDLE	8	94	105	104								
SIS/SMS TOTAL	ALL	451	451	453	0	0	0	0	0	0	0	0
OA-LOCUST ST ACADEMY	10	6	1	1								
OA-LOCUST ST ACADEMY	11	4	12	8								
OA-LOCUST ST ACADEMY	12	9	12	14								
OA-GED		11	7	9								
OA-LSA & GED	ALL	30	32	32	0	0	0	0	0	0	0	0
STAYTON HIGH	9	158	175	176								
STAYTON HIGH	10	134	167	165								
STAYTON HIGH	11	149	135	131								
STAYTON HIGH	12	126	148	146								
Early College (off campus)		10	6	6								
Transitions (post-grad SPED)		4	3	4								
STAYTON HIGH	ALL	581	634	628	0	0	0	0	0	0	0	0
NSSD Total (w/o PreK)	TOTAL	2008	2053	2053	0	0	0	0	0	0	0	0
NSSD Total (w/ PreK)		2036	2083	2085								
# Registered w/ WESD to homeschool		90	87	78								
# Enrolled in Virtual Charter Schools		116	133	144								

Notes

NSSD receives Preschool Promise Grant monies for preschool grades and does not receive state funding as it does for grades K-12 so they are not included in the total.



North Santiam School District

BOARD OF DIRECTORS

SCHOOL YEAR ANNUAL AGENDA ITEMS CALENDAR

Updated 09/2026

These agenda items typically occur every month so have not been repeated below:

1. Spotlight/Recognition/Awards (*may not occur every month*)
2. Consent Agenda: Approval of Meeting Minutes, Licensed Staff Changes or other items not expected to result in a board discussion.
3. Reports:
 - ASB/Student Activities Report
 - Superintendent's Report
 - Business Director's Report
 - Teaching & Learning Report
 - Licensed Union Rep. Report
 - City Council Liaison Reports
 - Informational Reports including: field trips, enrollment & upcoming events
4. First and/or second readings of updates to NSSD board policies
5. Board Reflections/Announcements

**The Superintendent Evaluation process and corresponding timeline are being reviewed/revised during the 2025-26 school year so those agenda items have been removed from this calendar. Once all the steps are finalized, they will be added to the applicable month.*

These items will appear as needed but do not happen at the same time every year:

1. Long Range Facility Master Planning Committee/Bond Planning
2. OSBA (in-house) training or other group learning opportunities
3. Budget Appropriations/Funding Resolutions
4. Curriculum Adoptions

July

According to [ORS 255.335](#), each district board shall hold a regular organizational meeting following the regular district election and not later than the last day of July of that year.

According to [ORS 332.040](#), No later than at the next regular meeting following July 1, the district school board shall meet and organize by electing a chairperson and a vice chairperson from its members.

During election years when there are no newly elected board members, the organizational items may be performed in June if the Board chooses to hold a work session in July (no business items) or skip the July meeting all together.

During election years when new members are seated, the organizational meeting must occur in July.

During non-election years, the meeting can occur in June, July or August (7/31 deadline does not apply).

Traditional Location: Santiam Room

Annual Agenda Items:

1. Oath of office for newly elected members
2. Elect chair and vice-chair (incumbent chair presides until a successor is elected). No member of the Board may serve as chair more than two years in succession unless the Board approves an extension of this period by a motion in June.
3. (Next Applicable in 2029) Begin Strategic Planning Process – every 5 years
4. Supt. Evaluation Document Approval
5. Board members choose their “buddy school”
6. Annual Organizational Agenda Items:
 - Designate the following positions:
 - Chief administrative officer (the superintendent) as school district clerk or another individual, if there is no chief administrative officer. (ORS 332.515)
 - Business manager or deputy clerk, or both. (ORS 332.515)
 - Custodian of funds who will sign checks or, if the school board so authorizes, utilize a facsimile signature for that purpose. (ORS 328.441, 328.445)
 - Budget officer, who shall prepare or supervise preparation of the budget document under the direction of the executive officer. (ORS 294.331)
 - Financial auditors for the school year. (ORS 328.465, 327.137, 297.405)
 - Legal counsel (no specific ORS/OAR but ORS 332.057 requires “Any duty imposed upon the district school board as a body must be performed at a regular or special meeting and must be made a matter of record”)
 - Civil Rights Coordinator ORS 332.505 (2)
 - Designate the fidelity-bond amounts for those authorized to handle district funds and ensure they are bonded by a surety company authorized in Oregon. (ORS 332.525)
 - Designate the Board as the Local Public Contract Review Board as per policy DJC (ORS 279A.060)
 - Approve contracts for payment (ORS 332.075(2-3) (e.g. transportation, contracts related to bond projects)
 - Establish depository(ies) for school funds. (ORS 328.441, 294.805-294.895)
 - Establish dates, time and place of regular monthly board meetings. (ORS 332.045)
 - Approve list of low-impact pesticides for use according to the integrated pest management plan ORS 634.705 (5)
 - Approve list of third-party alternative education programs (ORS 336.631)
 - Appoint members of standing committees (if applicable)
 - Appoint board member to participate on the district negotiation team (as board representative)
 - Receive English Learners In Oregon Annual Report by Sept 1 (distributed by ODE in June) ORS 327.016 (2) (b)
 - Receive Annual Restraint & Seclusion Report – (ORS 339.297 (2)(a)(B))

Other Activities/Events

- SummerFest (last Saturday in July)

August

Traditional Location: Santiam Room

Regular Session Annual Agenda Items:

1. Projected Student Enrollment

2. Oaths of Office of newly re-elected members, including any student representatives (if not done in July)
3. Approval of Board Operating Protocol

Other Activities/Events

- Leadership Team Goal Workshop (2nd week in August)
- OSBA Annual Conference (Salem)
- Safe Schools Training on Mandatory Reporting (online)
- Lyons Fire Dept Car Show
- Welcome Back to School-Staff (last week in August)
- Back to School Open Houses (see school calendars for dates)

September

Traditional Location: Santiam Room

Annual Agenda Items:

1. Possible nominations for NSSD board member wishing to run for an OSBA board position
2. Exit Interview Survey Results (Sept or Oct)- Director of Human Resources
3. Facilities Report (summer projects recap)
4. ODE Integrated Guidance Annual Report (requires oral presentation & public comment)-Director of Teaching & Learning

Other Activities/Events

- Safe Schools Training on Mandatory Reporting-due to be completed this month
- **National School-Related/Staff Appreciation Days This Month-** I.T. Professionals Day, Arts in Education Week

October

Traditional Location: Santiam Room

Annual Agenda Items:

1. Division 22 Report- Director of Teaching & Learning
2. District Design Goals (departments & buildings)
3. Stayton Booster Club Report (projects, membership, etc.) - Club President (may vary depending on status of current projects)

Other Activities

- State-Wide Licensed In-Service Day
- OSBA Regional Meetings
- **National School-Related/Staff Appreciation Days This Month-**Custodial Workers, School Bus Safety Week, Farm to School Month, Walk to School Day, Coaches Day, School Lunch Week, Red Ribbon Week, Bullying Prevention Month, School Principal Month

November

Traditional Location: Santiam Room

Annual Agenda Items:

1. OSBA Elections
2. At-A-Glance Reports-Director of Teaching & Learning (Nov or Dec)

3. SIA Finalized Grant Agreement (requires oral presentation, public comment and board approval)-Director of Teaching & Learning
4. TAG Program Report (Nov or Dec)
 - a. Number of Student Identified and the screening process
 - b. Supports/Programs offered

Other Activities/Events

- OSBA Annual Conference (Portland)
- **National School-Related/Staff Appreciation Days This Month**-School Psychologist Week, School Resource Officer Day, Education Support Professionals Day, Substitute Educators Day

December

Traditional Location: Stayton High School

Annual Agenda Items:

1. School Spotlight – Options Academy (possible building tour prior to meeting)
2. Special Programs Report - Director of Special Services
 - >Must include the Abbreviated School Day Notice & Acknowledgement
3. SIA Performance Review (req. every four years, next due 12/27)

Board Secretary Tasks:

1. Distribute copies of NSSD audit report to board members so they can review before the January meeting.
2. Contact existing Budget Committee members as soon as the tentative Budget Hearing date is set to see if they are available.

Other Activities/Events

National School-Related/Staff Appreciation Days This Month- Special Education Day

January

Traditional Location: Stayton Middle School

Annual Agenda Items:

1. Board Appreciation Month-Staff/Schools
2. School Spotlight-School Admin
3. WESD Local Service Plan Approval (every 2 years, next due 2027)-Superintendent
4. Audit Review- Director of Business & Fiscal Services (may be joined by rep. from auditing firm)
 - a. Must include audit of SIA financials and public comment
5. Approval of Budget Committee Calendar
6. Announcement of Budget Committee Vacancies
7. School Board Student Representative Recruitment Strategies
8. Annual report of all pesticide applications from the previous year-IPM Program Coord

Other Activities/Events

- Classified In-Service Day

Board Secretary Tasks:

- File notice of district board election, next due 2027 ([see Marion Co Calendar for deadline](#))
- Provide filing information to anyone seeking election/re-election (next due 2027)
- Notify Current Budget Committee of approved meeting dates after Jan. meeting

- Post Budget Committee Vacancies online and applications to apply

February

Traditional Location: Stayton Elementary School

Annual Agenda Items:

1. School Spotlight-School Admin
2. Proclamation for Classified Appreciation Week (occurs in March)
3. Integrated Guidance Application Review-Director of Teaching & Learning (every two years, next due 02/27)
4. Selection/Approval of Budget Committee Members- Director of Business & Fiscal Services
5. First Reading of Upcoming Year School Calendar
6. Review results of Youth Truth survey (if available-may not be ready until March)

Other Activities/Events

- Licensed In-Service Day
- Stayton Sublimity Chamber of Commerce Awards Banquet (schedule may vary)
- Booster Club Annual Auction

Other Activities/Events

- **National School-Related/Staff Appreciation Days This Month**-School Bus Driver Appreciation Day

Board Secretary Tasks:

- Continue facilitating applications for Budget Committee positions prior to Feb. meeting
- Coordinate with current student board representative and SHS admin to announce the student representative position openings for the upcoming school year. Applications should be submitted to the Board Administrative Assistant by May 1st.

March

Meeting #1 Traditional Location: District Office/Santiam Room

Special Session: (first Thursday in March)

1. Renewal of Contracts (Licensed/Administrative)

Meeting #2 Traditional Location: Sublimity School

Regular Session Annual Agenda Items:

1. School Spotlight-School Admin
2. Integrated Grants Application (requires oral presentation, public comment and board approval prior to submission, NEXT DUE 2027)-Director of Teaching & Learning
3. Upcoming Year School Calendar Adoption
4. Approve Board Chair & Vice-Chair (or designees) to negotiate contract extension on behalf of whole board.

Board Secretary Tasks:

- Coordinate with current student board representative, Supt and Board Member to promote the student representative position openings for the upcoming school year. Applications should be submitted to the Board Administrative Assistant by May 1st.
- Provide Reminder of Board Elections Filing Due Date (if applicable)

Other Activities/Events

National School-Related/Staff Appreciation Days This Month-Music in our Schools Month and Classified School Employee's Week

April

Traditional Location: Mari-Linn School

Annual Agenda Items:

1. School Spotlight-School Admin
2. Adopt resolution for Teacher Appreciation Week (first week of May)
3. If not completed in March = Integrated Grants Application (requires board approval prior to submission, NEXT DUE 2027)

Board Secretary Tasks

- Coordinate with current student board representatives, Supt and Board Member and to promote the student representative position openings for the upcoming school year. Applications should be submitted to the Board Administrative Assistant by May 1st.

Other Activities/Events

- **National School-Related/Staff Appreciation Days This Month-** School Library Month, Administrative Professional Day

May

NSSD Budget Committee traditionally meets in the second week of May

Traditional Location: Stayton High School

Annual Agenda Items:

1. School Spotlight-School Admin
2. Student awards @ SHS-Valedictorian, Salutatorian, Future First Citizen
3. Acknowledge current student reps. for service on the board
4. Select new student representatives to the school board for following year
5. WESD Local Service Plan List of Services Taken-Supt or Director of Business & Fiscal Services
6. Establish the number of student transfer requests into the District for coming year
7. *Typically, always have at least one curriculum adoption*

Board Secretary Tasks

- Prior to May meeting (after May 1st), coordinate with Supt and Board Member to review Student Rep. applications and then prepare and distribute comparison spreadsheet at least one week before the meeting date.

Other Activities/Events

- **National School-Related/Staff Appreciation Days This Month-**Teacher Appreciation Week, Principal's Day, School Lunch Hero Day, School Nurse Day, Speech Pathologists Day

June

Traditional Location: Santiam Room

Special Session/Budget Hearing (prior to Regular Session):

1. Review of Budget Documents/Resolutions: Director of Business & Fiscal Services

2. Allow for Public Comment

Regular Session Annual Agenda Items:

1. Resolutions to adopt budget- Director of Business & Fiscal Services
2. Approve Excise Tax annual adjustment for the upcoming school year
3. Select student representatives to the school board for following year (if not done in May)
4. Consider nominations for NSSD Board Awards (Santiam, Community Partner, Jack Adams, Golden Eagle)

****If the Board desires the current Board Chair to serve an additional year after already serving two consecutive years, they must vote to allow them to do so in the June meeting.**