

Alsea Regular Board Meeting
Thursday, October 12, 2023
7:00 PM
Alsea School Library
301 South 3rd Street
Alsea, OR 97324



Alsea School District 7J
301 South 3rd Street
Alsea, OR 97324
541.487.4305

1. Call to Order
 - a. Flag Salute
 - b. Approval of Agenda
2. Consent Agenda
 - a. Approval of Minutes - September 14, 2023

Alsea School Board Meeting
Thursday, September 14, 2023
Regular meeting 7:00 PM
Alsea School Library



Alsea School District 7J 301 South
3rd Street
Alsea, OR 97324
541.487.4305

Board members present - Risteen Follett, Deb Lindberg, Jamie Olsen, Soren Rounds, Russ Ceperich

Board members absent - None

Also present: patrons, employees, and association representatives

1. Call to Order 7:00 PM
2. Flag Salute
3. Adjourn to Executive Session -
4. Executive Session
 - ORS 192.660 (2)(H) To consult with counsel concerning the legal rights and duties of a public body with regard to current litigation or litigation likely to be filed.
5. Reconvene Regular Board Session - 7:24 PM
6. Approval of the Agenda - Agenda approved no modifications
7. Consent Agenda
 - 5.1. Approval of Minutes - July 13, 2023
 - 5.2. Approval of Minutes - August 17, 2023
 - 5.3. New Hires
 - Approve Hire Joe Harris, Building Teacher

Deb Lindberg motioned to approve the Consent Agenda. Soren Rounds seconded with the note that the resignation of the speech pathologist was missing. It will be added to next month's agenda.

8. Patron Comments

The Alsea School Board of Directors values the opinions and input of students, staff, parents, and community members. Although board meetings are held in public, they are not meetings of the public. Please keep your comments to 3 minutes or less. If you intend to speak to the board this evening, you will need to fill out one of the blue comment cards and hand it to the Board Secretary, Lora Nickle. Public comments may also be made via Zoom. If you intend to speak via Zoom, please put your name in the comments so that the board chair can call on you. Before you begin your comments, please state your name and if you are speaking for an organization, please state that organization. For more information about public comments at a board meeting, please see Alsea School District Policy BDDH.

9. Reports

7.1. Superintendent Report - Ms. Nieraeth

The OSHA settlement appeal has been signed by the judge. It is now set as a record. Legislature passed HB 2753 allows School Board members can get paid a stipend of up to \$500.00. However our Board Policy BHG says that you can't. If you decide that this is something you want we would have to suspend, amend or delete this policy. OSBA said that a new policy would be coming out that would allow this to happen. If you would like to wait until next spring to see what our budget looks like you can. These funds would come out of the building budget. There is a MOU in your packet for the public library. Mr. Gallagher started this last year and we will continue this. Next month you will be presented with the Division 22 Standard, this shows how the district is doing in terms of laws and obligations from the state. We are having a food service administrative review. Don Staehley and Bart Rothenberger are getting ready for that. This is to ensure that processes and procedures are being followed. A Point of Sales system will help with reports required. We are continuing to partner with Benton County Health Services for our Counseling service to students.

We are having a Title III desk audit this year. These are funds for our ELL students. Heather Shunk is going to lead Alsea's audits. We hired Sandra Pinion as the ESL teacher of record and Coordinator. She will work closely with Ms. Shunk to make sure that we are in compliance. Ms. Nieraeth assured the board that these ODE audits are not an 'I got you' it is truly to make sure that we are doing everything we are supposed to be doing and doing it correctly. We are working with LBLED to bring more Special Education services to our students. Leslie Boser, our online Special Education teacher will continue to provide services to those students.

7.2. K-6 Brick and Mortar Principal Report - Ms. Nieraeth

There have been a lot of expectations worked on with the elementary students on processes. How do we walk down the hall? How do we behave in the cafeteria etc. The students and staff have been doing great. The staff has been working really hard getting procedures into place. We are implementing a new i-ready system that will assess students in reading and math. At the next meeting we should be able to present you with that data. Students will take these assessments three times a year. Our hope is to present you with a lot of data so that next spring we can make more informed decisions moving forward..

7.3. Learn at Home K-5 Principal Report - Ms. Shunk

The online program is doing very well. We have brought in additional curriculum which is research based that is phonics based to help students with reading and writing. We are working with our schedule to maximize our time with students. One large change has been the addition of 'Exploring Time'. Since our students are at home this gives them an opportunity to work with all of our teachers. For the teachers it has been wonderful to share their activity focus, it is a high engagement time. i-ready has been a great addition to be able to assess our students to give more accurate information to parents as well as teachers to ensure we are meeting needs. Our entire staff has been working really hard to provide the best academic experience possible.

7.4. 7-12 Brick and Mortar Principal Report - Mr Rothenberger, presented by Ms. Nieraeth

Bart asked all of his staff to give him some positive things that they wanted to say. They say that science is going really well. Mr. Lynch's class painted a new mural over the concession stand. English, the new curriculum is going really well. They wanted to highlight the Volleyball and Football teams. Cycle Oregon is coming this weekend. Transportation is going well. Our busses are all full, we have three bus drivers and could use more. Ms. Nieraeth commented that she is really proud of how staff has adapted to scheduling issues as well as all of the changes that have been going on.

7.5. Business Manager Report - Mr. Staehely

You have been given two financial statements. One, as of June 30th, is the audit for the first part of October. This is the last statement you will receive for the 2022-23 until the audit is done. If you notice the carry over from last month is at \$4m. This will be needed because the comparison to last year you received \$11.5 m and this year you will only receive about \$7m. This is due to the decline in enrollment numbers. He will also be proposing funds around. As you will notice, athletics were moved to a special revenue. This should be part of the general fund. Stipends and salaries are a part of the general fund. September 25th is the big payroll where teachers and classifieds will all be set up with medical and dental. When that is completed that will all be moved to encumbered. At that time we will know where we stand financially. Currently the general fund is very elementary but will be adjusted more accurately for next month. Transportation included funds for Kings Valley that won't be there any more since they moved to Falls City thus, adjustments will be made to reflect that change. Food Service is not to make money. It is to provide food to our students. You budgeted for \$2m as an unappropriated balance. This will be carried over to next year as well. Hopefully we will have more. Lastly is information on the Bond and where we stand with that. We will be working more with the Giggys.

7.6. Bond Update - Chris and Nancy Giggy

CB Construction's performance has spiraled down this last month. The HVAC submittals were not according to documents. Some of it was inferior and some of it was just wrong. They have had to work with CB Construction and the Architect who is a mechanical engineer to be corrected. Ms. Nieraeth met with legal counsel to create a letter for lack of performance. The letter gives them one week to rectify the situation. They have rectified everything except the letter of commitment, this is supposed to arrive tomorrow. CJ Hansen will be back next week to continue the HVAC work. CB has given us a master

schedule. This will be used to hold them to the requirements. The letter will help us hold them to ensure that they keep moving forward with what they were hired to do and keep them on track. On the brighter side, the electrician is on schedule. Once the switch is received then they will come back to complete their work. The other part of the project is the CTE building. Meetings have been set with the architect to continue working with Seth Stevens the CTE teacher to finalize the plans. They would like a meeting set to finalize the plans so that they can move on to securing contractors. They hope to get things lined up with the county. The final design is due in November. So they hope to get started after the beginning of the year. Additionally they are asking the design team to put together early bid packages for the underground utility and slab work so that we can meet the deadline of March 30th to get funds spent so they do not lose the escrow money. The Seismic Grant, there is a summary in your packet. Hopefully we get good news on that this coming spring.

7.7. Enrollment Report - Ms Nieraeth

Monthly you will get updates on enrollment for the beginning of every month.. Currently the building enrollment is roughly 200 and Learn at Home is at 84. This will help you to see the changes that will affect our budget. Historically you will be able to compare to previous years. We are continuing to try to build enrollment for LaHO. We are in the process of recalling a teacher to help with the class sizes of 1st and 2nd grades. One of the things to consider is, are we wanting enrollment to rise because of quantity vs. quality. We want to make coming to Alsea a school that families want to be a part of because of the quality of our education program. We could put something in place in the spring for future years that would hold our 'guest' students accountable as far as attendance expectations etc. This would be presented to you in a Work Session. Next month's board agenda will include how many students are in district vs. out of district as per the board request.

8. New Business

8.1. Integrated Guidance Application and Budget Update

- Special Board Meeting needs

Ms. Nieraeth is requesting a Special Board session for next week to present the board with the budget as well as an equity statement. This is to be able to say "when we make decisions about our kids this is what we believe. We believe that every student regardless of income, rural or urban community that everyone is treated the same". When this application is submitted it has to show that it was passed by the School Board. Emails were sent out to students who are ELL, Special Education and students of color to get their feedback. You will notice that it has also been posted on our Facebook page to gather information from the community as well. These responses will have to be included with the application. Deb Lindberg motioned to set a date for a Special Board meeting to hear details on the Integrated Guidance Application. Russ Ceperich seconded. A meeting date of September 20th at 6:30 PM. All in favor. Motion passed unanimously.

8.2. Board and Superintendent Operating Agreement

Deb Lindberg motioned to accept the Operating Agreement. Jamie Olsen seconded. All in favor. Motion passed unanimously.

8.3. Superintendent Goals Collaboration Meeting Date

Ms. Nieraeth is requesting the date set for September be moved as she has a Superintendent retreat scheduled that is important for her to attend. Deb Lindberg made a motion to push back the Superintendent goals date. Russ Ceperich seconded. A date of October 18th at 6:00 PM was set for a Superintendent collaboration meeting..

8.4. OSBA Statewide Conference - November 9-11

Please let Lora Nickle know if you will be able to attend. She will register everyone as well as make the hotel reservations. Because the next board meeting is scheduled for November 9th Russ Ceperich motioned to reschedule that meeting to the next week of November 16th at 7:00 PM. Jamie Olsen seconded. All in favor. Motion passed unanimously.

9. Old Business

10. First Reading

11. Second Reading

11.1. JEBA-AR Early Entrance

Russ Ceperich motioned to accept the Policy. Jamie Olsen seconded. There was discussion about some of the wording and who is responsible for paying fees to do so. There wording of Parents/Guardians will be added. Deb Lindberg had the concern of the 'age gap' and some of the issues this can cause. Ms. Nieraeth stated that this is not a common request from parents. As well as the testing that would be done is stringent in that they have to meet the 95% to be considered. Also the date for parents to make a request has been moved up from August 1st to June 1st. Russ Ceperich amended his motion to include the changes of wording to Parents/Guardians and the date of June 1st. Jamie Olsen seconded. All in favor. Motion passed unanimously.

12. Board Comments

Russ Ceperich brought up that he is hearing students requesting that Student Leadership be brought back. Ms. Nieraeth said that interested students should contact Mr. Rothenberger. Risteen commented that this board meeting has been the smoothest to date and appreciated everyone working together for our students.

13. Future Agenda Items

Add the resignation of the Speech Pathologist.

14. Key Dates

- September 15-16, Cycle Oregon
- September 20, Special Board Session 6:30 PM
- October 3, Vision Screenings
- October 12, Regular Board Meeting
- October 13, Teacher Work Day
- October 18, School Board Work Session 6:00 PM
- October 27, End of First Quarter - Teacher Work Day
- November 9-11, OSBA Statewide Convention - Portland

15. Adjournment - 8:52 PM

School Board Chair

Date

Superintendent

Date

b. Approval of Minutes - September 20, 2023



1. Call to Order 6:30 PM
2. Flag Salute
3. Board Members present - Risteen Follett, Soren Rounds, Jamie Olsen, Russ Ceperich
4. Board Member Online - Deb Lindberg
5. Approval of Agenda - No changes. Agenda Approved

6. Patron Comments - None

The Alsea School Board of Directors values the opinions and input of students, staff, parents, and community members. Although board meetings are held in public, they are not meetings of the public. Please keep your comments to 3 minutes or less. If you intend to speak to the board this evening, you will need to fill out one of the blue comment cards and hand it to the Board Secretary, Lora Nickle. Public comments may also be made via Zoom. If you intend to speak via Zoom, please put your name in the comments so that the board chair can call on you. Before you begin your comments, please state your name and if you are speaking for an organization, please state that organization. For more information about public comments at a board meeting, please see Alsea School District Policy BDDH.

7. New Business

7.1. Integrated Guidance Presentation of Plan and Budget - Krista Nieraeth

Ms. Nieraeth presented to the School Board the Integrated Guidance Plan for Alsea School District including:

- 7.a. Budget documents
- 7.b. School and State data
- 7.c. Community, Student and Staff feedback surveys
- 7.d. Equity Lens-HEC and ODE Equity Lens.

Ms Nieraeth explained the background of this grant and went through each document and explained to the Board the details of each document and how they will be put into place for Alsea School students. She explained how we will be tracking our data to ensure areas of focus are being met.

Tonight Ms. Nieraeth is asking the Board to approve one of the Equity Statements. Soren Rounds asked for clarification on the P20, Community College piece and what it was. Russ Ceperich just wanted to ensure that all students are included and given the opportunity for success. Deb Lindberg agreed. Risteen Follett recommended moving forward with a motion. Jamie Olsen motioned to accept the Integrated Guidance Plan and Budget as presented with the Equity Statement HEC with edits requested. Russ Ceperich seconded. No further discussion. All in favor. Motion passed unanimously.

8. Adjourn 8:00 PM

- c. Vote to Approve Settlement of Claim
 - d. Accept Resignation - Michelle Morimoto, Speech Pathologist
 - e. Approve Hire - Paul Owen, WLA Bus Driver
 - f. Accept Resignation - Keith Hogan, Bus Driver
 - g. Approve Hire - Jamie Amador, WLA Bus Driver
 - h. Approve Hire - Peter Martindale, WLA Bus Driver
3. Patron Comments:
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4. Reports
- a. Superintendent Report - Ms Nieraeth

Alsea School District

October Meeting Board Report

Krista Nieraeth, Superintendent and Special Education Director

1. Audits and Administrative Reviews - ODE

Alsea School District will be having an Administrative Review for the National School Lunch Program for the upcoming year on Wednesday, October 11th. Don has been working with Brynn, Lora, Roxie and myself to complete the annual audit, which is happening right now. The audit will be presented to the board by Pauley Rogers, CPA, at the December meeting and must be submitted to ODE by December 31. Bart and I will be working with WLA to prepare for a transportation audit in November.

2. Division 22 Standards

I will be presenting the Division 22 Standards to the board this meeting. These standards are presented for the 2022 – 2023 school year. This is a requirement of ODE that the standards are presented to the board and community by November 1st and submitted to ODE by November 15th.

3. Evaluation and Support System

We have fully implemented the teacher evaluation and support system this year using TeachBoost. There is a cycle that is required for all teachers and administrators. There are 4 required elements in the evaluation and support systems that must be completed each year. The staff had a training with administration in September over this process.

4. Facilities and Bond

The facilities department is continuing to work on ensuring that the fences and gates are functioning properly. We are working on replacing exterior doors that need replacing and will be assessing the other doors throughout the year. Don worked with the Giggys and successfully submitted the documentation to ODE for the district to use up the remaining ESSER II dollars by September. We are also still waiting for Benton County for permits for the restroom between the 4/5 grade classrooms.

5. Data Systems

The district has tested students K – 12 using the i – Ready system for math and reading. This data shows where a student is at in both subjects and breaks the subjects down by the main categories found within the Common Core State Standards (CCSS). The district can use the data, as well as other data points, to help plan where best to budget resources to help work on the needs of our students and support the teachers in those areas. Support could come in the form of professional development opportunities, supports in the classroom, as well as curriculum and supplements that fit the needs of our students, etc. The district also uses data from the state to look at where strengths and weaknesses lie and again, uses the data to plan where best to budget resources to best support our students.

6. VCSA and Special Education Meetings

Alsea is part of the Valley Coast Superintendent Association (VCSA). This group will be meeting monthly to discuss regional issues, as well as how we can collaborate to bring resources to our region and schools. Our first meeting was in September in Newport. I also attended the COSA Superintendent meetings, as well as a Special Education meeting, where we discussed new legislation passed in Oregon around special education and IDEA. I am also attending monthly SPED meetings with the Hungerford's to ensure that the district is staying up to date on SPED law and cases.

Information asked for:

B/M students:

In district addresses – 100 students

Out of District addresses – 98 students

Through 10/1/23		
Regular Attenders		
Grade	Enrollment #	% of total
KG	18	66.67%
1st	42	80.95%
2nd	36	72.22%
3rd	31	74.19%
4th	25	64.00%
5th	24	70.83%
6th	13	76.92%
7th	20	60.00%
8th	13	53.85%
9th	23	65.22%
10th	12	58.33%
11th	14	64.29%
12th	13	30.77%
Schoolwide	284	64.48%

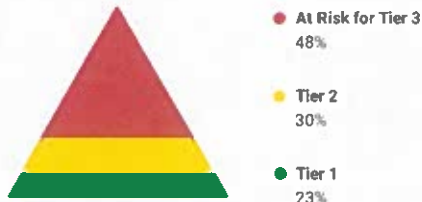
Diagnostic Results



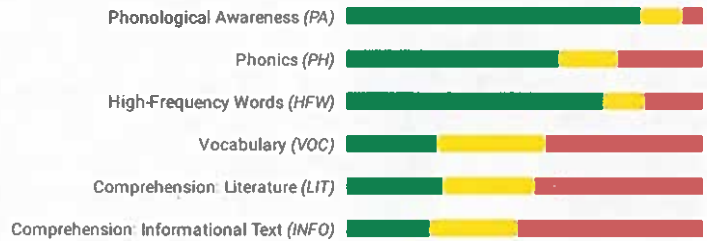
School All Schools
Subject Reading
Academic Year 2023 - 2024
Diagnostic Fall
Prior Diagnostic None
Placement Definition Standard View

Students Assessed/Total: 275/286

Overall Placement



Placement By Domain



Switch Table View

Show Results By

Placement Summary

School

Showing 3 of 3

School	Overall Grade-Level Placement	Students Assessed/Total
ALSEA ELEMENTARY		107/108
ALSEA MIDDLE & HIGH SCHOOL		91/91
LEARN AT HOME OREGON		77/87



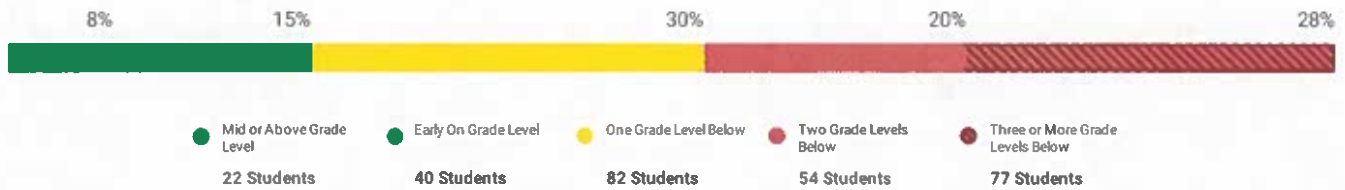
Diagnostic Results



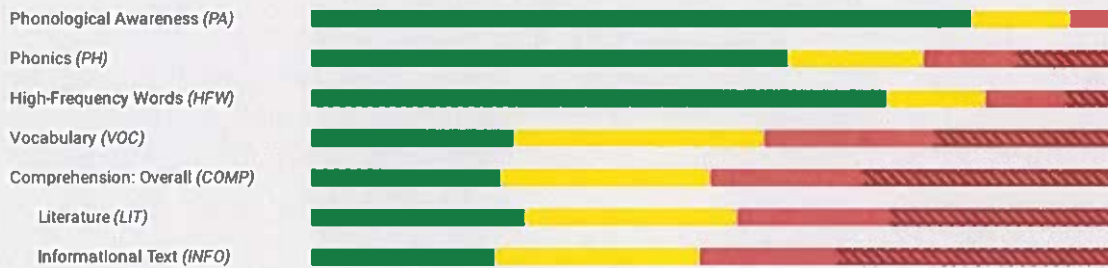
School: All Schools
 Subject: Reading
 Academic Year: 2023 - 2024
 Diagnostic: Fall
 Prior Diagnostic: None

Overall Placement

Students Assessed/Total: 275/286



Placement by Domain



Switch Table View

Choose to Show Results By

Placement Summary

School

Showing 3 of 3

School	Overall Grade-Level Placement	Mid or Above Grade Level	Early On Grade Level	One Grade Level Below	Two Grade Levels Below	Three or More Grade Levels Below	Students Assessed/Total
ALSEA ELEMENTARY		7%	10%	36%	30%	18%	107/108
ALSEA MIDDLE & HIGH SCHOOL		1%	13%	14%	12%	59%	91/91
LEARN AT HOME OREGON		18%	22%	40%	14%	5%	77/87



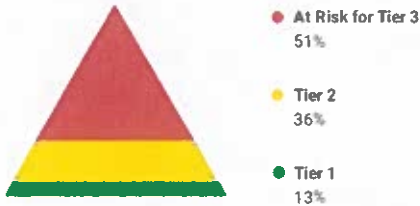
Diagnostic Results



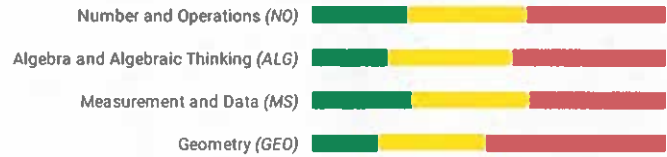
School All Schools
Subject Math
Academic Year 2023 - 2024
Diagnostic Fall
Prior Diagnostic None
Placement Definition Standard View

Students Assessed/Total: 269/282

Overall Placement



Placement By Domain



Switch Table View

Show Results By

Placement Summary

School

Showing 3 of 3

School	Overall Grade-Level Placement	Students Assessed/Total
ALSEA ELEMENTARY	6% (Tier 1) 46% (Tier 2) 49% (At Risk for Tier 3)	107/108
ALSEA MIDDLE & HIGH SCHOOL	9% (Tier 1) 13% (Tier 2) 78% (At Risk for Tier 3)	87/87
LEARN AT HOME OREGON	28% (Tier 1) 49% (Tier 2) 23% (At Risk for Tier 3)	75/87



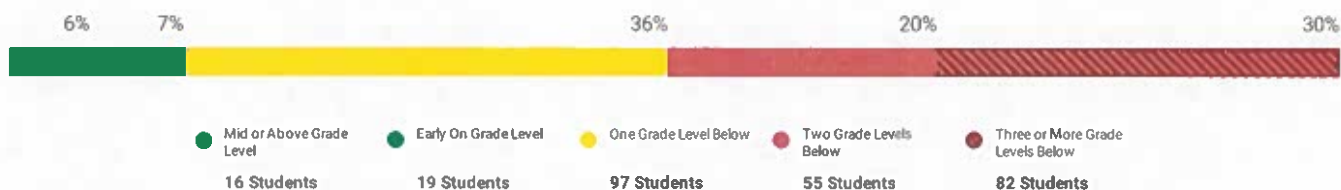
Diagnostic Results



School: All Schools
 Subject: Math
 Academic Year: 2023 - 2024
 Diagnostic: Fall
 Prior Diagnostic: None

Overall Placement

Students Assessed/ Total 269/282



Placement by Domain



Switch Table View

Choose to Show Results By

Placement Summary

School

Showing 3 of 3

School	Overall Grade-Level Placement	Mid or Above Grade Level	Early On Grade Level	One Grade Level Below	Two Grade Levels Below	Three or More Grade Levels Below	Students Assessed/Total
ALSEA ELEMENTARY		1%	5%	46%	26%	22%	107/108
ALSEA MIDDLE & HIGH SCHOOL		1%	8%	13%	16%	62%	87/87
LEARN AT HOME OREGON		19%	9%	49%	17%	5%	75/87



Alsea School District Data 2016 - 2023

Higher ADMr

	2016 - 17	2017 - 18	2018 - 19	2019 - 2020	2020 - 2021	2021 - 2022	2022 - 2023
4 year Graduation							
Alesea SD	92.3	50.0	37.3 (51)	38.7 (31)	47.4 (38)	42.0	
ESD Region	77.4	77.8	77.5	79.5	73.4	x	
State	76.7	78.7	80.0	82.6	80.6	81.0	
5 year Graduation							
Alesea SD	68.8	86.7	43.8 (32)	51 (49)	53.3 (30)	60.0	
ESD Region	85.2	86.3	85.6	85.3	85.5	x	
State	83.2	84.6	86.3	87.2	87.8	87.0	
9th Grade On Track							
Alesea SD	90.0	90.0	33.3		48.6 (37)	35.9 (39)	62.0
ESD Region	81.1	79.4	79.7		67.4	82.4	x
State	83.3	83.8	85.2		73.5	82.7	84.0
Regular Attenders							
Alesea SD	76.5	55.6	67.2 (195)		80.4 (669)	57.9 (694)	51.0
ESD Region	76.9	74.6	75.7		63.0	62.1	x
State	80.3	79.5	79.6		71.9	64.0	62.0
3rd Grade Reading							
Alesea SD	x	18.2	x			38.9	17.0
ESD	43.5	44.1	44.5			39.6	x
State	46.1	47.7	47.2			40.0	40.0

*Data pulled from Oregon Department of Education Data

Alsea SD 7J

Student Group Data for 5 Common Metrics

4 Year Graduation: 2016-17 - 2020-21 (pages 2 - 4)
5 Year Completion: 2016-17 - 2020-21 (pages 5 - 7)
9th Grade on Track: 2016-17 - 2021-22 (pages 8 - 10)
Regular Attenders: 2016-17 - 2021-22 (pages 11 - 14)
3rd Grade ELA: 2015-16 - 2021-22 (pages 15 - 17)

SUPPRESSED

These data are provided to increase shared understanding and support engagement with communities, particularly focal student groups and their families, to establish and maintain a strategic plan to support student learning, well-being, and development. The data will also be useful to inform the development of Longitudinal Performance Growth Targets.

The *Integrated Guidance For Six ODE Initiatives* (<https://www.oregon.gov/ode/studentsuccess/pages/innovation-and-improvement.aspx>) has more information on effective use of these data as well as a better picture of the challenges that focal group students face in their educational journey.

Each applicant under the integrated guidance is required to review disaggregated data in this form as part of their planning process.

Each file will either have suppressed or unsuppressed data; suppressed data are ready for conversations with the public (can be used in community engagement, board presentations, etc.) while **unsuppressed data contains potentially identifiable information that is not for public use**. Unsuppressed data must only be shared securely on a "need to know" basis, and needs to be stored in secure locations.

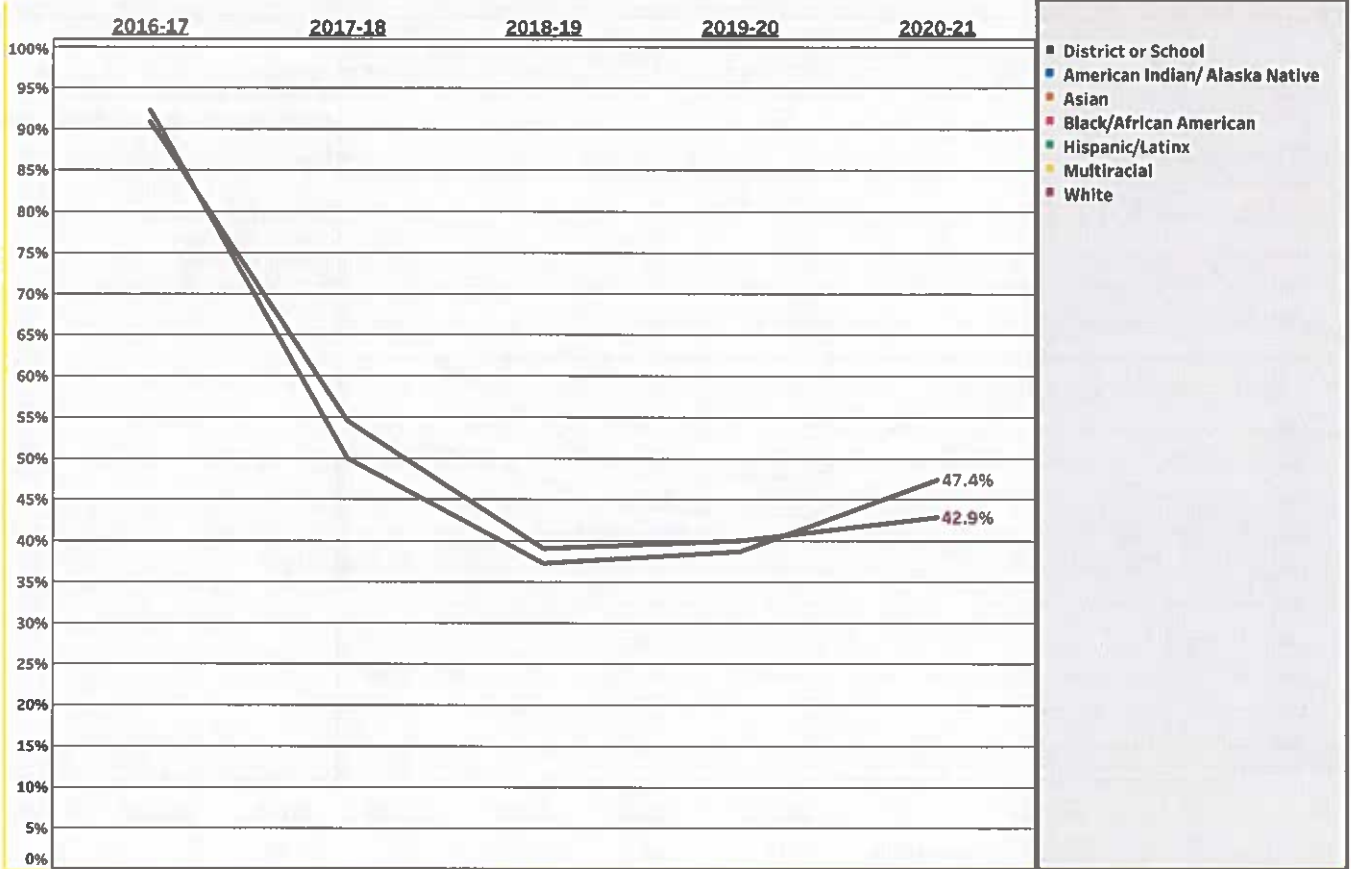
See the end notes (page 18) to understand the data sources, how suppressed information is displayed (96%/4%), student group inclusion rules, and why you have missing data for some indicators/years.

Release Date: November, 2022

SUPPRESSED

Alsea SD 7J

Four Year Graduation Rate by RACE/ETHNICITY



		2016-17	2017-18	2018-19	2019-20	2020-21	Average	Trend
District or School	Students Meeting Metric	12	13	19	12	18		
	All Students In Cohort	13	26	51	31	38		
	Rate	92.3%	50.0%	37.3%	38.7%	47.4%	46.5%	-10.1%
American Indian/ Alaska Native	Students Meeting Metric							
	All Students In Cohort							
	Rate							
Asian	Students Meeting Metric							
	All Students In Cohort							
	Rate							
Black/African American	Students Meeting Metric							
	All Students In Cohort							
	Rate							
Hispanic/Latinx	Students Meeting Metric							
	All Students In Cohort							
	Rate							
Multiracial	Students Meeting Metric							
	All Students In Cohort							
	Rate							
White	Students Meeting Metric	10	12	16	12	12		
	All Students In Cohort	11	22	41	30	28		
	Rate	90.9%	54.5%	39.0%	40.0%	42.9%	47.0%	-11.1%

SUPPRESSED

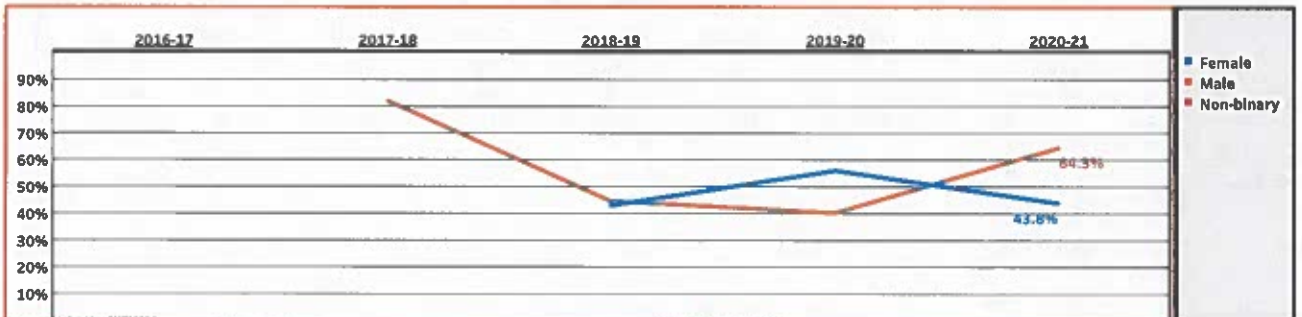
Alsea SD 7J

5 Year Completion Rate by STATE, ESD, and DISTRICT or SCHOOL



		2016-17	2017-18	2018-19	2019-20	2020-21	Average	Trend
Alsea SD 7J	Students Meeting Metric	11	13	14	25	16		
	All Students in Cohort	16	15	32	49	30		
	Rate	68.8%	86.7%	43.8%	51.0%	53.3%	55.6%	-6.6%
Linn, Benton, Lincoln ESD	Students Meeting Metric							
	All Students in Cohort							
	Rate	85.2%	86.3%	85.6%	85.3%	85.5%	85.6%	0.0%
Statewide	Students Meeting Metric							
	All Students in Cohort							
	Rate	83.2%	84.6%	86.3%	87.2%	87.8%	85.8%	1.2%

Five Year Completion Rate by GENDER

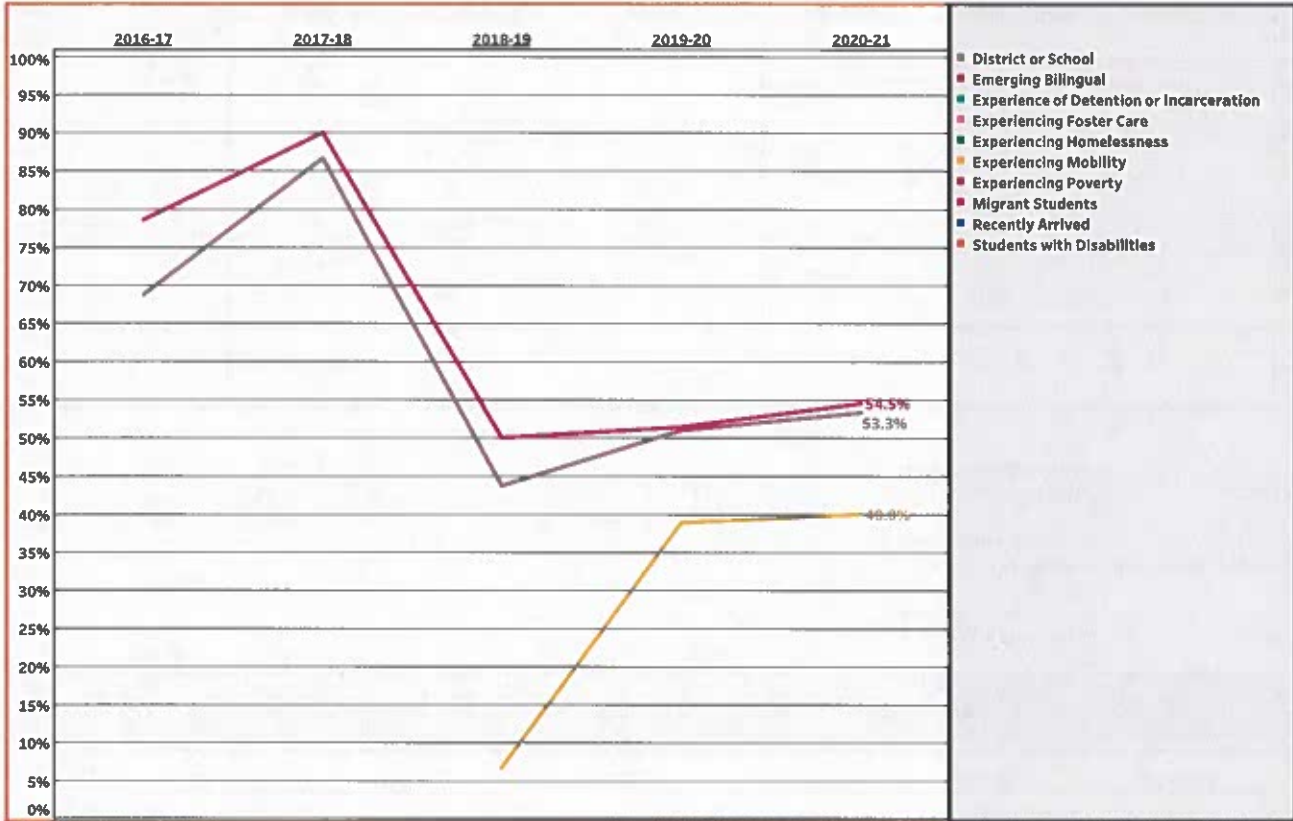


		2016-17	2017-18	2018-19	2019-20	2020-21	Average	Trend
Female	Students Meeting Metric			6	19	7		
	All Students in Cohort			14	34	16		
	Rate			42.9%	55.9%	43.8%		
Male	Students Meeting Metric		9	8	6	9		
	All Students in Cohort		11	18	15	14		
	Rate		81.8%	44.4%	40.0%	64.3%		
Non-binary	Students Meeting Metric							
	All Students in Cohort							
	Rate							

SUPPRESSED

Alsea SD 7J

Five Year Completion Rate by ADDITIONAL FOCAL GROUPS

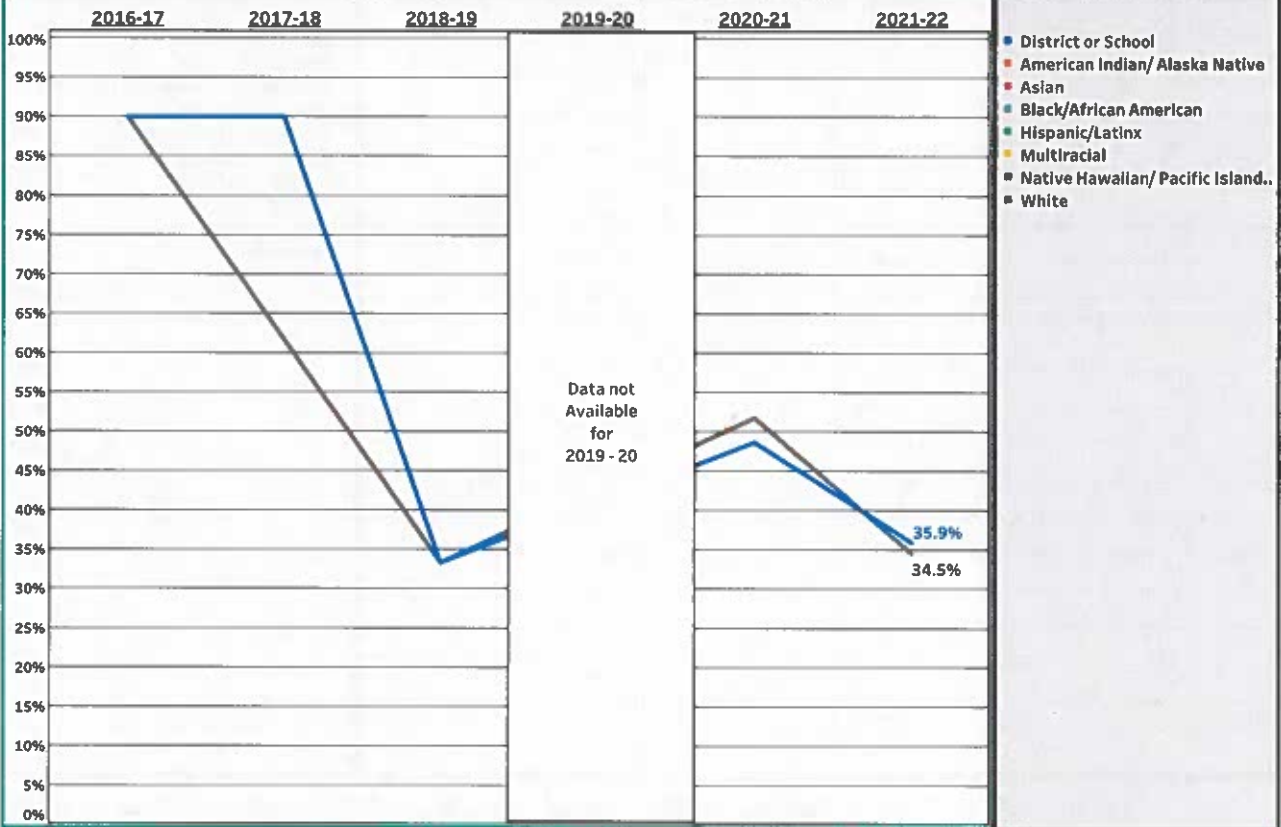


		2016-17	2017-18	2018-19	2019-20	2020-21	Average	Trend
District or School	Students Meeting Metric	11	13	14	25	16		
	All Students in Cohort	16	15	32	49	30		
	Rate	68.8%	86.7%	43.8%	51.0%	53.3%	55.6%	-6.6%
Emerging Bilingual	Students Meeting Metric							
Experience of Detention or Incarceration	Students Meeting Metric							
Experiencing Foster Care	Students Meeting Metric							
Experiencing Homelessness	Students Meeting Metric							
Experiencing Mobility	Students Meeting Metric			1	14	6		
	All Students in Cohort			15	36	15		
	Rate			6.7%	38.9%	40.0%		
Experiencing Poverty	Students Meeting Metric	11	9	12	18	12		
	All Students in Cohort	14	10	24	35	22		
	Rate	78.6%	90.0%	50.0%	51.4%	54.5%	59.0%	-8.7%
Migrant Students	Students Meeting Metric							
Recently Arrived	Students Meeting Metric							
Students with Disabilities	Students Meeting Metric							

SUPPRESSED

Alesa SD 7J

9th Grade on Track for Graduation Rate by RACE/ETHNICITY

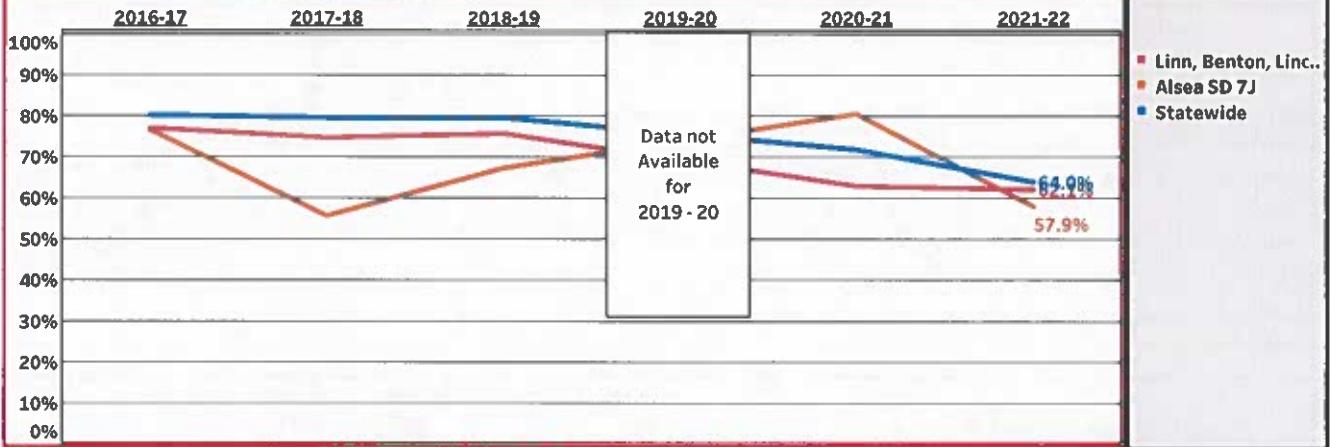


		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Average	Trend
District or School	Students Meeting Metric	9	9	5		18	14		
	All Students in Cohort	10	10	15		37	39		
	Rate	90.0%	90.0%	33.3%		48.6%	35.9%	49.5%	-15.0%
American Indian/ Alaska Native	Students Meeting Metric								
	All Students in Cohort								
	Rate								
Asian	Students Meeting Metric								
	All Students in Cohort								
	Rate								
Black/African American	Students Meeting Metric								
	All Students in Cohort								
	Rate								
Hispanic/Latinx	Students Meeting Metric								
	All Students in Cohort								
	Rate								
Multiracial	Students Meeting Metric								
	All Students in Cohort								
	Rate								
Native Hawaiian/ Pacific Islander	Students Meeting Metric								
	All Students in Cohort								
	Rate								
White	Students Meeting Metric	9		4		15	10		
	All Students in Cohort	10		12		29	29		
	Rate	90.0%		33.3%		51.7%	34.5%		

SUPPRESSED

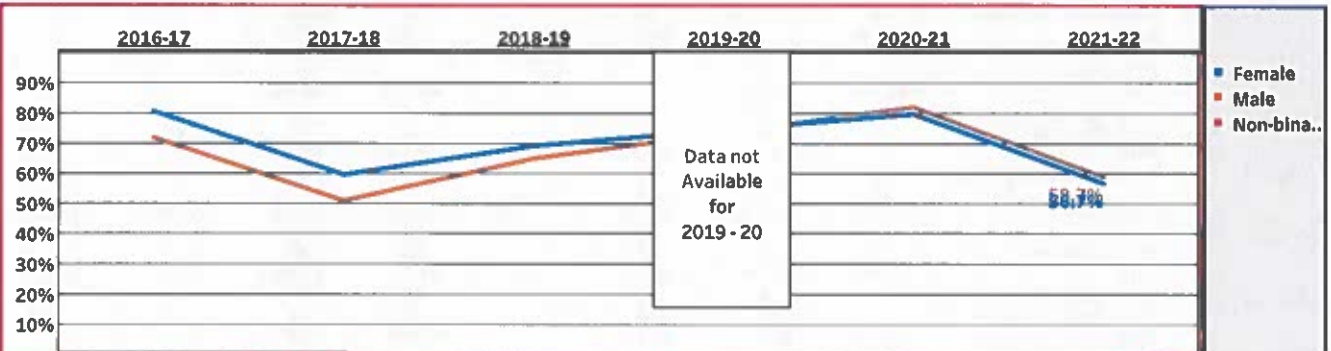
Alsea SD 7J

Regular Attenders (Not Chronically Absent) Rate by STATE, ESD, and DISTRICT or SCHOOL



		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Average	Trend
Alsea SD 7J	Students Meeting Metric	101	80	131		538	402		
	All Students in Cohort	132	144	195		669	694		
	Rate	76.5%	55.6%	67.2%		80.4%	57.9%	68.3%	-1.2%
Linn, Benton, Lincoln ESD	Students Meeting Metric								
	All Students in Cohort								
	Rate	76.9%	74.6%	75.7%		63.0%	62.1%	70.5%	-4.1%
Statewide	Students Meeting Metric								
	All Students in Cohort								
	Rate	80.3%	79.5%	79.6%		71.9%	64.0%	75.2%	-4.0%

Regular Attenders (Not Chronically Absent) Rate by GENDER

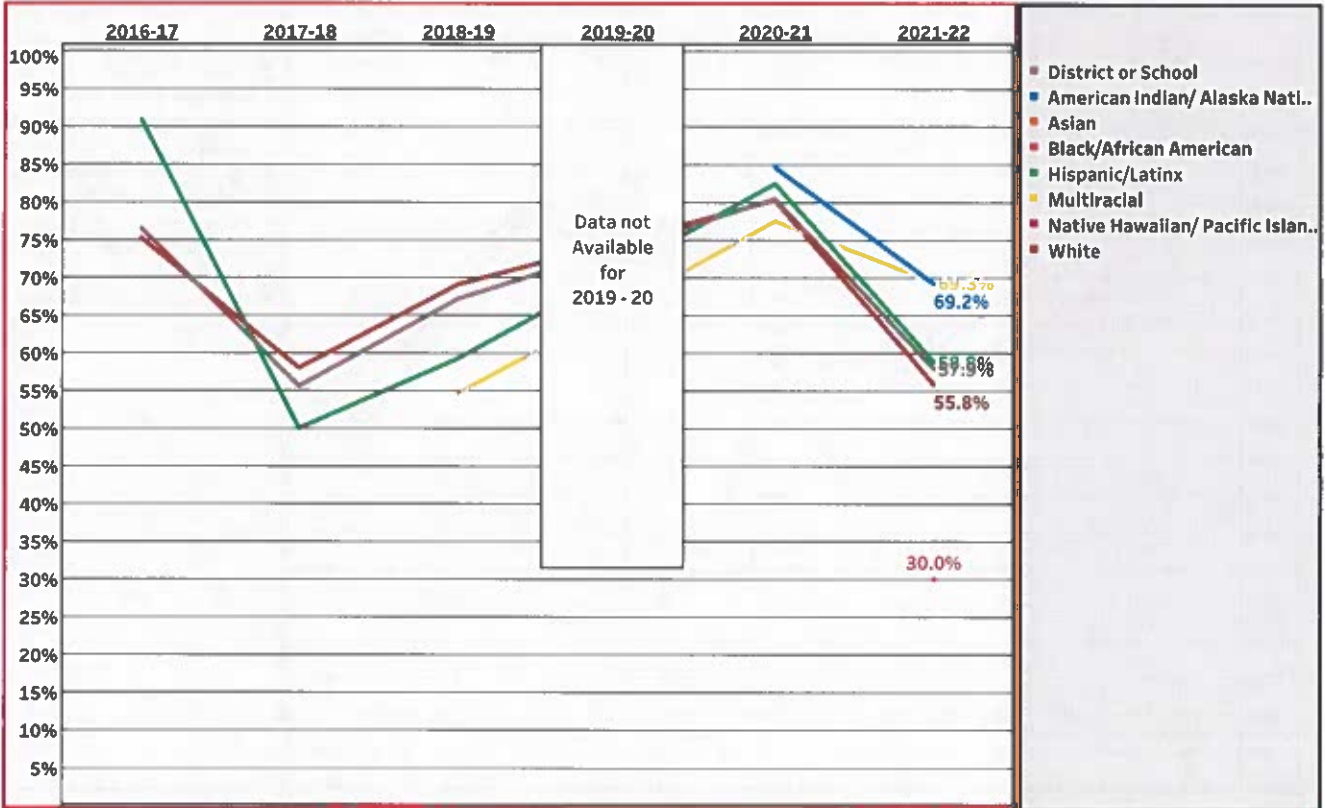


		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Average	Trend
Female	Students Meeting Metric	58	47						
	All Students in Cohort	72	79						
	Rate	80.6%	59.5%	69.2%		79.7%	56.7%	68.6%	-2.8%
Male	Students Meeting Metric	43	33						
	All Students in Cohort	60	65						
	Rate	71.7%	50.8%	64.8%		81.8%	58.7%	68.0%	0.5%
Non-Binary	Students Meeting Metric								
	All Students in Cohort								
	Rate								

SUPPRESSED

Alsea SD 7J

Regular Attenders (Not Chronically Absent) Rate by RACE/ETHNICITY

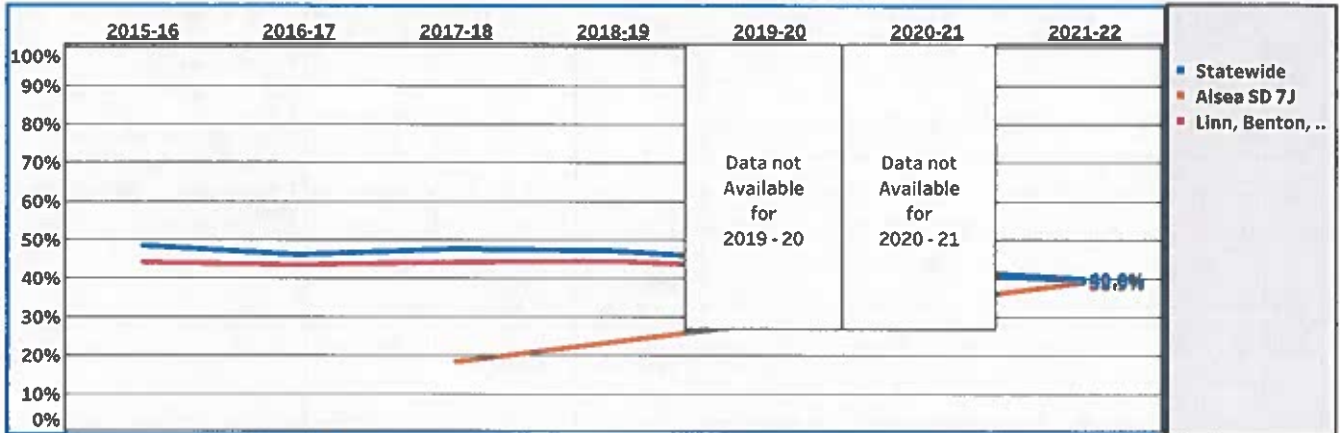


		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Average	Trend
District or School	Students Meeting Metric	101	80	131		538	402		
	All Students in Cohort	132	144	195		669	694		
	Rate	76.5%	55.6%	67.2%		80.4%	57.9%	68.3%	-1.2%
American Indian/ Alaska Native	Students Meeting Metric					11	9		
	All Students in Cohort					13	13		
	Rate					84.6%	69.2%		
Asian	Students Meeting Metric								
	All Students in Cohort								
	Rate								
Black/African American	Students Meeting Metric						3		
	All Students in Cohort						10		
	Rate						30.0%		
Hispanic/Latinx	Students Meeting Metric	10	8	16		75	60		
	All Students in Cohort	11	16	27		91	102		
	Rate	90.9%	50.0%	59.3%		82.4%	58.8%	68.4%	-3.2%
Multiracial	Students Meeting Metric			6		58	52		
	All Students in Cohort			11		75	75		
	Rate			54.5%		77.3%	69.3%		
Native Hawaiian/ Pacific Islander	Students Meeting Metric								
	All Students in Cohort								
	Rate								
White	Students Meeting Metric	88	69	105		387	268		
	All Students in Cohort	117	119	152		482	480		
	Rate	75.2%	58.0%	69.1%		80.3%	55.8%	67.9%	-1.6%

SUPPRESSED

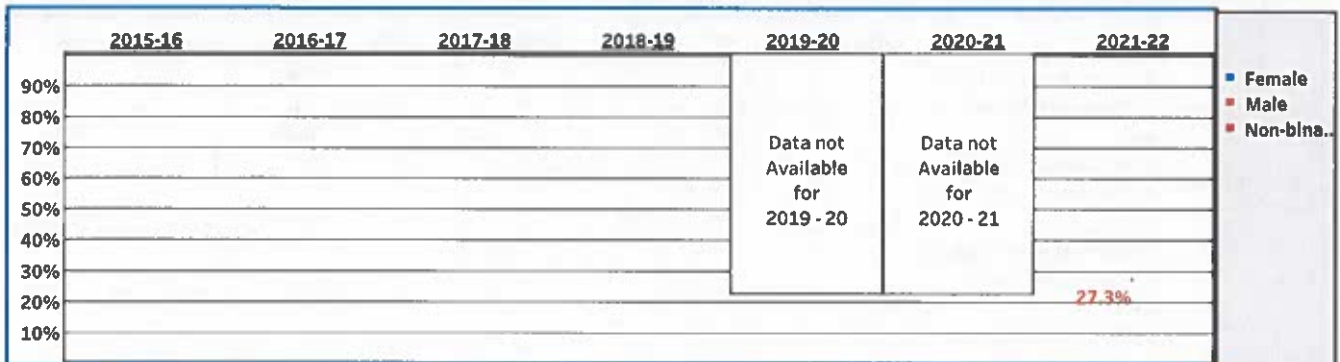
Alesa SD 7J

3rd Grade English Language Arts Proficiency Rate by STATE, ESD, and DISTRICT or SCHOOL



		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Average	Trend
Alesa SD 7J	Students Meeting Metric All Students in Cohort		2				7		
	Rate		18.2%				38.9%		
Linn, Benton, Lincoln ESD	Students Meeting Metric All Students in Cohort								
	Rate	43.5%	44.1%	44.5%			39.6%	43.2%	-0.8%
Statewide	Students Meeting Metric All Students in Cohort								
	Rate	46.1%	47.7%	47.2%			40.0%	46.0%	-1.6%

3rd Grade English Language Arts Proficiency Rate by GENDER

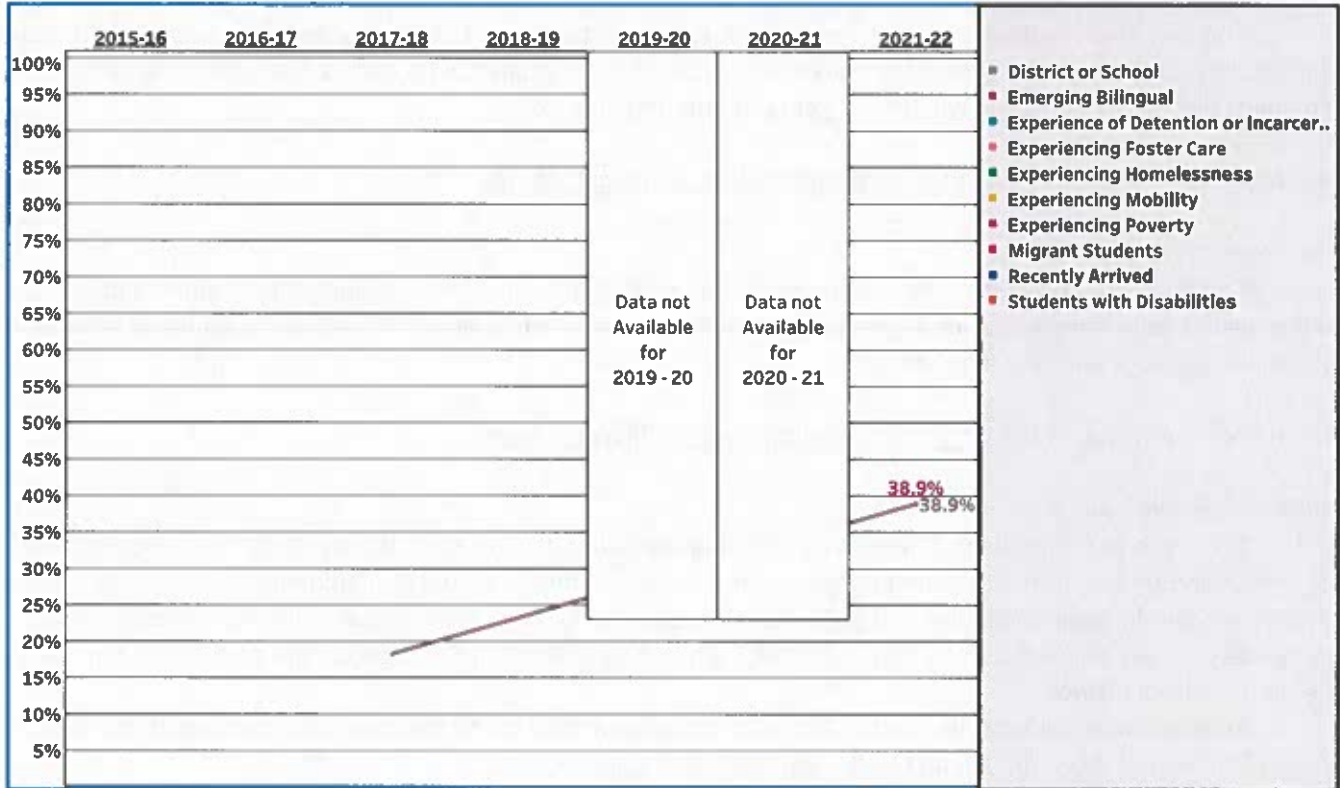


		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Average	Trend
Female	Students Meeting Metric All Students in Cohort								
	Rate								
Male	Students Meeting Metric All Students in Cohort								
	Rate						27.3%		
Non-Binary	Students Meeting Metric All Students in Cohort								
	Rate								

SUPPRESSED

Alsea SD 7J

3rd Grade English Language Arts Proficiency Rate by ADDITIONAL FOCAL GROUPS



- District or School
- Emerging Bilingual
- Experience of Detention or Incarcer..
- Experiencing Foster Care
- Experiencing Homelessness
- Experiencing Mobility
- Experiencing Poverty
- Migrant Students
- Recently Arrived
- Students with Disabilities

		2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Average	Trend
District or School	Students Meeting Metric All Students In Cohort Rate			2 11 18.2%				7 18 38.9%		
Emerging Bilingual	Students Meeting Metric All Students In Cohort Rate									
Experience of Detention or Incarceration	Students Meeting Metric All Students In Cohort Rate									
Experiencing Foster Care	Students Meeting Metric All Students In Cohort Rate									
Experiencing Homelessness	Students Meeting Metric All Students In Cohort Rate									
Experiencing Mobility	Students Meeting Metric All Students In Cohort Rate									
Experiencing Poverty	Students Meeting Metric All Students In Cohort Rate							7 18 38.9%		
Migrant Students	Students Meeting Metric All Students In Cohort Rate									
Recently Arrived	Students Meeting Metric All Students In Cohort Rate									
Students with Disabilities	Students Meeting Metric All Students In Cohort Rate									

Grade 3 English Language Arts (ELA) Assessment (OSAS) Proficiency Rate

The Grade 3 ELA OSAS met or exceeded standard (proficiency) rate is the percentage of third grade students who took the Oregon Statewide Assessment in English Language Arts and scored a '3' (met standard) or '4' (exceeded standard). Test results of English Learner students first enrolling in a U.S. school after August 15 of the reporting school year are not included.

This rate was not reported for the 2019-20 or 2020-21 school years due to a state waiver of required participation in the summative assessments.

See more information on the [English Language Arts Assessment webpage](#).

STUDENT POPULATIONS

Gender

The three reported gender categories are: Female, Male, and Non-binary. Schools and districts may have more options for identification but reporting to the Oregon Department of Education must fall within these three categories.

Race and Ethnicity

The seven reported race and ethnicity categories are: American Indian/ Alaska Native, Asian, Black/African American, Hispanic/Latino/Latina/Latinx, Multiracial, Native Hawaiian/ Pacific Islander, and White. Schools and districts may have more options for identification but reporting to the Oregon Department of Education must fall within these groupings to meet federal reporting requirements.

Students Experiencing Mobility

This population is defined as students who have first enrolled in K-12 after October 1st, left enrollment prior to May 1st, changed schools within a school year, or left a school and returned to the same school with more than a ten weekday gap in enrollment. Students are considered to be mobile if they have experienced one or more of these conditions.

This data comes from the Cumulative ADM data collection each year.

Students Experiencing Homelessness

This population is defined as students who do not have access to a fixed, regular, or adequate nighttime residence. This includes students whose nighttime residence is one of: shelter, unsheltered, hotel or motel, or doubled-up/shared housing. This population does not have data reported for the 2016-17 school year.

This data comes from the ESEA McKinney-Vento Homeless collection.

Students who are Emerging Bilingual

This population is defined as students who are developing skills in their first language as well as English, whose difficulties in speaking, reading, writing, or understanding the English language may be sufficient to deny the individual:

- the ability to meet the challenging State academic standards;
- the ability to successfully achieve in classrooms where the language of instruction is English; or
- the opportunity to participate fully in society.

This data comes from a matching of the ESEA Title III: English Learners spring collection and/or English Language Proficiency Assessment records. This student group is sometimes referred to as “English Learners”.

Students who are Migrant

This population is defined as students who have moved to Oregon or within Oregon within the last three years in order for themselves or their family to pursue work as migrant agricultural workers or fishers.

This data comes from the Oregon Migrant Student Information System (OMSIS) from the most recent previous year.

SUPPRESSION RULES

For the suppressed versions of the data sheets, student populations of fewer than 10 students do not have rates reported to protect student privacy. These will appear as blanks in the graphs and data tables. Also, to ensure student privacy and confidentiality, rates higher than 95% or lower than 5% will not be reported; instead these will appear as 96% or 4%, respectively, and the data tables will have student counts as blanks.

b. K-6 Brick and Mortar Principal Report - Ms. Nieraeth

Alesea School District

October Meeting Board Report – K-6 B&M School

Krista Nieraeth, Principal

Classroom Updates/Accomplishments:

- Kindergarten: Kindergarten students are working on phonics sounds and sight words the first 6 weeks of kindergarten.
- 1st Grade: The students have been engaged with the new reading curriculum. They also like the books that we have been reading that came with it.
- 2nd Grade: We have been studying bird's nests, and the birds who build them. We are also studying bird's beaks, and how they find/eat food. We will be making bird feeders next week, and determining what foods will attract the birds we want in our backyard! (Mystery Science is awesome!)
- 3rd Grade: In third grade, we are learning about Native American Tribes of Oregon. Students are conducting research projects about five tribes, including the Alesea and will soon take on the role of teacher as they teach their classmates about tribe cultures.
- 4th Grade: We were able to visit the Alesea library, have storytime with the librarian, and learn about how the library is organized before checking out our own books!
- Mr. Rozborski: Elementary PE finished our 'throwing and catching' unit last week, and are on our second week of our tag games unit.
- Ms. O'Brien: K-1 are learning about primary and secondary colors, symmetry and coloring within the lines. 2nd - 4th graders are learning about drawing lightly and fine detail.
- Mr. Lynch: The 5/6 graders have been doing Watercolors, modeling clay, ink prints, finger puppets, paper lanterns for Halloween and soon we're going to start making paper masks also for Halloween.

Upcoming Field Trips:

- The K – 3 students will be visiting Davis Family Farms the afternoon of October 23rd.
- On November 2nd, grades 4 – 6 will be working with the Benton Soil and Water Conservation District to visit Clemens Community Park and learn about salmon and healthy watersheds through hands-on activities. The classes will be with guides and they will have learning opportunities for the entire day.

- Mr. Rothenberger is working on taking all students K – 8 to an OSU Beavers Beyond the Classroom Field Trip Day in November.

Assessments:

In this packet, you can see the results of the Alsea Elementary School K – 6 I – Ready for Math and ELA. Teachers will be using this data to help drive instruction in the classroom and set goals for the year. Student results will also be used to help with remediation and enrichment through the i- Ready program.

Samantha Olsen is finishing up our DIBELS assessments at the elementary school.



4th Grade back from the library

c. Learn at Home K-5 Principal Report - Ms. Shunk

ALSEA SCHOOL DISTRICT BOARD REPORT

Name: Heather Shunk **Position:** Principal

BOARD MEETING DATE: October 10, 2023

Highlights/Kudos: I am delighted to share the highlights from our first month of virtual instruction, demonstrating the progress and dedication of our students, parents, teachers, and staff members. The feedback that I am receiving from families on different aspects of our program is very positive. Students feel welcome and comfortable within the classroom and interacting with each other and teachers. I would like to send a Kudos to Nathan Roberts for ensuring that our online classrooms are operating consistently and any issues are addressed immediately.

Our October Newsletter can be found here: <https://www.smore.com/yug51>

Accomplishment: Our Exploratory Class schedule continues to be a huge success allowing space for students to bond with each other while learning Art, Spanish, Reader’s Theater, etc. As students spend time with all of the teachers each week, the sense of community is strengthened each day. Students know that they have an entire team of teachers supporting and encouraging them to be the best they can be. We are seeing a significant increase of student interaction and attendance throughout the school day.



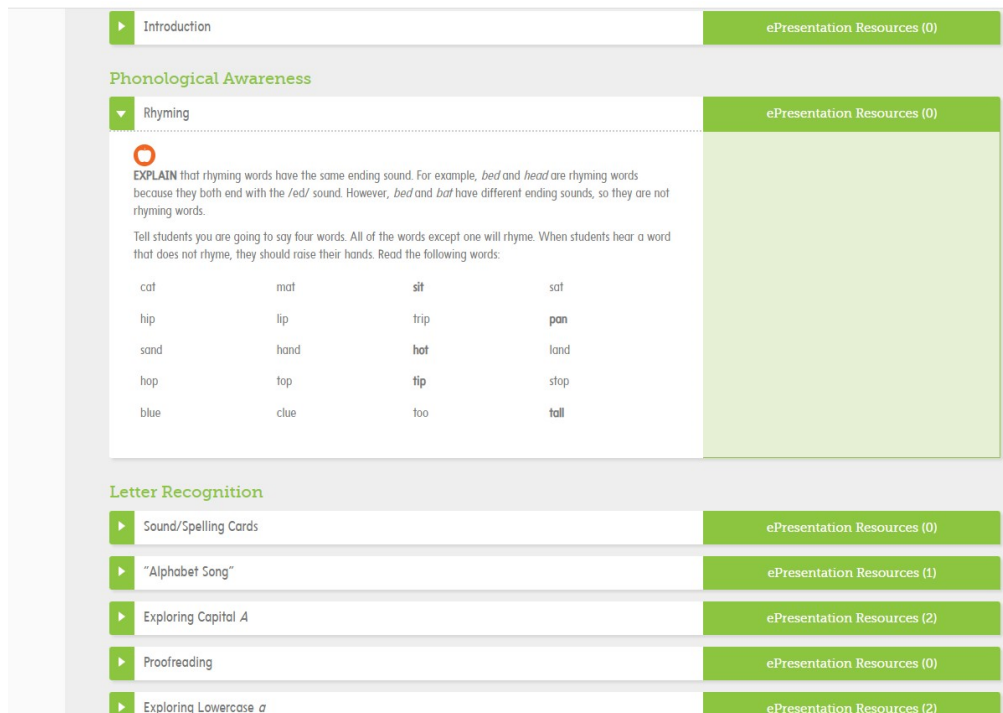
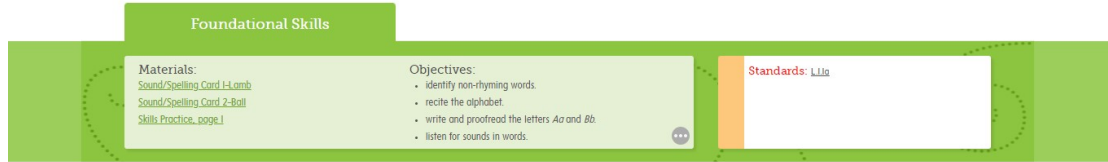


Assessments: We are grateful that Kayla Wilson has been able to complete the DIBELS diagnostic on the majority of our students thus far. That process will provide a clear picture of skill levels as it pertains to foundational literacy levels. In combination with data provided by the IReady Diagnostic, our teachers will have a comprehensive view of each child’s academic needs. In coordination with students, and Learning Coaches, teachers will develop a goal and specific areas to target during “WIN (What I Need) Time” each day. Students, teachers, and parents will remain in communication on progress towards proficiency or mastery. Teachers will provide information on how Learning Coaches can support students outside of the classroom as well.

Personnel Highlights: Each of our staff members have been doing an exceptional job with all of the new pieces to our program. I appreciate that we are working as a team to provide an effective learning opportunity for our students every day. The creativity and resourcefulness of each of our staff allows us to ensure that we are providing students with an engaging environment while maintaining a high level of standards and expectations.

Curriculum/Classroom: Our Kindergarten - 3rd Grade teachers attended a two hour professional development training on the Open Court Foundational Skills Curriculum through McGraw Hill. Students and teachers are working through units online and practicing skills within their hard copy workbooks. Explicit instruction in phonics aligns with the Science of Reading (SOR) concept that has been proven as the most effective route to building independent reading and comprehension skills. The following screenshots showcase the extensive Teacher’s Edition (1st grade) that provides tremendous resources and guidance for teachers to support all of their students. These screenshots capture part of the lesson plans

for one day. The last screenshot in order shares an example of a lesson built to support language learners (Bilingual Learners). Please let me know if you would like a tour of the curriculum.



▶ Exploring <i>Bb</i>	ePresentation Resources (2)												
▶ Guided Practice	ePresentation Resources (1)												
Reviewing Sounds and Letters													
▼ Listening for Vowel Sounds: /ā/ <p>EL</p> <p>The primary focus of these listening activities is to check students' ability to hear letter sounds. The words in these activities are meant to be heard by students but not seen. They should not be written on the board. Remind students that the red letters, the vowels, are special letters. They are special because every word or syllable needs a vowel sound.</p> <p>Write <i>Aa</i> on the board and say the sound /ā/. Explain to students that you will read a list of words. They must listen carefully to find out whether they can hear the /ā/ sound in each word. Tell students to point to <i>Aa</i> on the board and say /ā/ if they hear the sound and to sit silently if they do not hear it. Say the following words:</p> <table border="0"> <tr> <td>day</td> <td>say</td> <td>sat</td> <td>bow</td> </tr> <tr> <td>bake</td> <td>lake</td> <td>cute</td> <td>face</td> </tr> <tr> <td>chase</td> <td>lace</td> <td>lose</td> <td>made</td> </tr> </table>	day	say	sat	bow	bake	lake	cute	face	chase	lace	lose	made	ePresentation Resources (0)
day	say	sat	bow										
bake	lake	cute	face										
chase	lace	lose	made										
▶ Listening for Consonant Sounds: /b/	ePresentation Resources (1)												
▶ Dictation and Spelling	ePresentation Resources (0)												

Program Vision Updates: A big goal of mine for this school year was to embed opportunities for field trips. In coordination with Principal Bart Rothenberger, our students and their families have been invited to participate with students from Alsea School District and attend the OSU Basketball game towards the end of November. I am hopeful that this opportunity will prove successful and that we will be able to add more field trip opportunities to our calendar. Our unique learning environment lends itself really well to dynamic engagement strategies. Another new piece we have added to the daily schedule is asynchronous academic concept introduction videos created by our teachers. Students will be able to access short instructional videos focused on the academic concept being introduced and worked on during the live class time. This will allow students to familiarize themselves with new concepts and come to class with informed questions and ready to interact in a more effective manner. These videos will also allow students to review content multiple times if needed accommodating various learning styles.

d. 7-12 Brick and Mortar Principal Report - Mr. Rothenberger

October Board Report – 7-12 Principal

From behind the principal's desk:

This last month has been busy, and I personally am learning how to shuffle many different tasks at hand. The entire staff has been resilient in assisting and covering for each other. The students are starting to understand the new expectations we have delivered, and overall the Wolverines are moving in a great direction.

Again, I asked my staff to give me a highlight of one positive from their department.

CTE/Ag:

CTE classes have been busy cleaning and organizing the shop. We started a small project utilizing a few woodworking tools and skills.

Some students are working to figure out the CNC plasma machine and have been taking turns practicing the one welding machine we have.

Ag classes have been working on creating marketing materials and ag sales. We also took our first field trip with middle schoolers to Scio for the AG Olympics.

High school PE and Strength and Conditioning classes:

In high school pe, my activity participation-rate is practically 100% when everyone is healthy. Students who experience aches and pains still participate to a limited degree with the goal of pain-free movement. They are given agency to decide if they are capable of continuing activities based on their physical health. We are starting to retest in the weight room and I feel we are going to see great results.

Science:

I have been very impressed with how hard students are working and the positive relationships we have been building. I am thankful to be back at Alsea with the staff and student body.

Art:

The mural above the stage concession stand is finished and it looks great. We are now working on painting and cleaning a sign for the mercantile.

English:

We put up a kindness board in the English classroom where kids post a sticky note with anecdotes of how their friends and classmates show them kindness! Examples include stories of people sharing their food, helping each other with school work, giving compliments, giving rides, and just being a great friend. People have also used the board to simply post compliments and nice things for everyone to read.

Math:

Class average for Algebra 2 is in the 90's.

Athletics:

Did a grade check on athletes and it was the best grades by our athletic programs since I have been here.

HS Volleyball:

The varsity is 9-2 in the league and sitting in third place.

HS Football:

The football team is 7-0 and ranked #2 in the state.

MS Volleyball and Football:

Both programs are representing the Wolverines to the fullest and doing great.

Transportation:

This has been a big adjustment, but we are getting better every day. In the next two weeks we will add two more drivers that will help incredibly.

e. Business Manager Report

**GENERAL FUND
STATEMENT OF RESOURCES
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023**

LINE	SOURCE	BUDGET	Y-T-D 9/30/2023	PROJECTED	TOTAL 9/30/2023	BALANCE OVER/(UNDER)
STATE SCHOOL SUPPORT FORMULA						
1	1111 CURRENT YEAR'S TAXES	\$ 499,000.00	\$ 1,085.79	497,914.21	\$ 499,000.00	\$ -
2	1112 PRIOR YEAR'S TAXES	1,000.00	14.84	985.16	1,000.00	-
3	1114 OTHER TAXES	-	-	-	-	-
4	1190 INTEREST ON TAX COLLECTIONS	800.00	156.00	-	156.00	(644.00)
5	2101 COUNTY SCHOOL FUND	2,500.00	1,666.58	4,833.42	6,500.00	4,000.00
6	3103 COMMON SCHOOL FUND	66,340.92	-	62,743.82	62,743.82	(3,597.10)
7	3101 STATE SCHOOL SUPPORT FUND	6,773,656.93	2,326,991.00	3,981,142.18	6,308,133.18	(465,523.75)
8	4801 FEDERAL FOREST FEES	-	-	-	-	-
9	TOTAL 2023-24 SSSF SOURCES (Line 1 - Line 8)	7,343,297.85	2,329,914.21	4,547,618.79	6,877,533.00	(465,764.85)
STATE SCHOOL SUPPORT FORMULA (Prior Yr Adjustments)						
10	STATE SCHOOL SUPPORT FUND 22-23	-	-	-	-	-
11	HIGH COST GRANT	-	-	-	-	-
12	TOTAL SSSF PRIOR YR ADJ (Line 10 - Line 11)	-	-	-	-	-
13	TOTAL SSSF SOURCES (Line 9 + Line 12)	7,343,297.85	2,329,914.21	4,547,618.79	6,877,533.00	(465,764.85)
NON STATE SCHOOL SUPPORT FORMULA SOURCES						
LOCAL SOURCES						
14	1412 TRANSPORTATION FEE FROM OTHER DISTRICTS	88,505.00	-	-	-	(88,505.00)
15	1510 EARNINGS ON INVESTMENTS	25,000.00	52,815.90	-	52,815.90	27,815.90
16	1910 RENTAL INCOME	12,000.00	-	-	-	(12,000.00)
17	1920 DONATIONS	6,000.00	-	-	-	(6,000.00)
18	1980 FEES CHARGED OTHER GRANTS	15,000.00	-	-	-	(15,000.00)
19	1990 MISCELLANEOUS REVENUE	23,800.00	9,233.18	-	9,233.18	(14,566.82)
20	1991 ERATE	1,000.00	-	-	-	(1,000.00)
21	TOTAL LOCAL SOURCES (Line 14 - Line 20)	171,305.00	62,049.08	-	62,049.08	(109,255.92)
OTHER SOURCES						
22	2102 REVENUE THROUGH ESD	4,000.00	-	-	-	(4,000.00)
23	3203 SPECIAL EDUCATION PROGRAMS	8,000.00	-	-	-	(8,000.00)
24	5300 INSURANCE REIMBURSEMENT	5,000.00	-	-	-	(5,000.00)
25	5400 BEGINNING CASH	2,999,999.65	4,378,189.76	-	4,378,189.76	1,378,190.11
26	TOTAL OTHER SOURCES (Line 22 - Line 26)	3,016,999.65	4,378,189.76	-	4,378,189.76	1,361,190.11
27	TOTAL NON SSSF SOURCES (Line 21 + Line 27)	3,188,304.65	4,440,238.84	-	4,440,238.84	1,251,934.19
28	TOTAL RESOURCES (Line 13 + Line 27)	\$ 10,531,602.50	\$ 6,770,153.05	\$ 4,547,618.79	\$ 11,317,771.84	\$ 786,169.34

**GENERAL FUND
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023**

		<u>ACTUAL</u>				<u>TOTAL</u>	<u>BALANCE</u>	<u>--%--</u>
		<u>Y-T-D</u>	<u>Requisition</u>	<u>s</u>	<u>ENCUMBERED</u>	<u>9/30/2023</u>	<u>FAVORABLE/</u>	<u>COMMITTED</u>
INSTRUCTION		<u>BUDGET</u>	<u>9/30/2023</u>				<u>(UNFAVORABLE)</u>	
1111	Elementary, K-5	1,346,195.00	95,730.03	260.71	824,109.28	919,839.31	426,355.69	
1113	Elementary Extra-curricular	-	-	-	-	-	-	
1121	Middle/Junior High Programs	518,950.00	21,446.88	28.30	206,928.31	228,375.19	290,574.81	
1122	Middle/Junior High School Extra-curricular	-	4,567.91	40.22	9,042.73	13,610.64	(13,610.64)	
1131	High School Programs	556,350.00	37,751.62	42.47	274,000.17	311,751.79	244,598.21	
1132	High School Extra-curricular	101,000.00	32,163.75	40.22	56,705.16	88,868.91	12,131.09	
1140	Pre-kindergarten Programs	-	239.56	-	480.44	720.00	(720.00)	
1210	Programs for the Talented and Gifted Less Restrictive Programs: Students w/ Disability	3,499.50	-	-	-	-	3,499.50	
1250	Alternative Education	1,192,450.00	134,511.49	7.10	500,125.82	634,637.31	557,812.69	
1280	Charter Schools	-	-	-	-	-	-	
1288	English Second Language Programs	21,000.00	-	-	-	-	21,000.00	
1291		9,600.00	1,396.88	-	10,989.29	12,386.17	(2,786.17)	
	TOTAL INSTRUCTION	3,749,044.50	327,808.12	419.02	1,882,381.20	2,210,189.32	1,538,855.18	58.95%
SUPPORT SERVICES								
2114	Student Accounting Services	53,920.00	-	-	-	-	53,920.00	
2134	Nurse Services	12,000.00	1,508.00	-	6,032.00	7,540.00	4,460.00	
2142	Psychological Testing Services	35,000.00	-	-	-	-	35,000.00	
2152	Speech Pathology Services	161,360.00	1,323.25	-	25,783.31	27,106.56	134,253.44	
2160	Other Student Treatment Services	28,000.00	790.00	-	-	790.00	27,210.00	
2190	Service Direction, Student Support Services	34,050.00	7,982.03	-	28,703.29	36,685.32	(2,635.32)	
2210	Improvement of Instruction Services	-	4,429.93	-	348.96	4,778.89	(4,778.89)	
2222	Library/Media Center	1,250.00	-	-	-	-	1,250.00	
2230	Assessment and Testing	6,848.00	697.77	-	3,488.97	4,186.74	2,661.26	
2240	Instructional Staff Development	1,000.00	-	-	-	-	1,000.00	
2310	Board of Education Services	162,200.00	39,167.43	-	150.00	39,317.43	122,882.57	
2321	Office of the Superintendent Services	335,100.00	87,605.40	830.33	205,009.08	292,614.48	42,485.52	
2410	Office of the Principal Services	507,070.00	95,626.83	-	270,706.25	366,333.08	140,736.92	
2520	Fiscal Services	369,900.00	40,061.87	60.91	181,974.32	222,036.19	147,863.81	

**GENERAL FUND
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023**

		<u>ACTUAL</u>			TOTAL	BALANCE	--%--	
		Y-T-D	Requisition	ENCUMBERED	9/30/2023	FAVORABLE/ (UNFAVORABLE)	COMMITTED	
		BUDGET	9/30/2023	s	9/30/2023	(UNFAVORABLE)	COMMITTED	
2540	Operation and Maintenance of Plant Services	613,500.00	163,469.01	2,286.34	263,700.07	427,169.08	186,330.92	
2550	Student Transportation Services	1,660,150.00	166,727.97	169.99	505,113.62	671,841.59	988,308.41	
2558	Special Education Transportation Services	-	546.31	-	-	546.31	(546.31)	
2660	Technology Services	92,400.00	41,362.29	1,807.60	45,335.97	86,698.26	5,701.74	
2700	Supplemental Retirement Program	-	2,497.92	-	7,657.20	10,155.12	(10,155.12)	
TOTAL SUPPORT SERVICES		4,073,748.00	653,796.01	5,155.17	1,544,003.04	2,197,799.05	1,875,948.95	53.95%
OTHER REQUIREMENTS								
5110	Long-Term Debt Service	20,100.00	19,978.69	-	-	19,978.69	121.31	
5200	Transfers of Funds							
5200 790	Food Service	123,405.00	-	-	123,405.00	123,405.00	-	
5200 792	Bus Fund	259,000.00	-	-	259,000.00	259,000.00	-	
5200 795	Athletics	164,200.00	-	-	-	-	164,200.00	
6110	Operating Contingency	120,000.00	-	-	-	-	120,000.00	
7000	Unappropriated Ending Fund Balance	2,022,105.00	-	-	-	-	2,022,105.00	
TOTAL OTHER REQUIREMENTS		2,708,810.00	19,978.69	-	382,405.00	402,383.69	2,306,426.31	14.85%
TOTAL EXPENDITURES		\$ 10,531,602.50	\$ 1,001,582.82	\$ 5,574.19	\$ 3,808,789.24	\$ 4,810,372.06	\$ 5,721,230.44	45.68%

Special Revenue
Statement of Grants and Other Special Revenue Funds

5

#	Fund Title	SOURCE	End Date	Grant Amount	REVENUE					EXPENDITURES				Balance
					Beginning Cash	Y-T-D	PROJECTED	Transfer from General Fund	TOTAL	Y-T-D	ENCUMBERED	TOTAL		
200	Donations				3,353.63	3,560.55			6,914.18	354.52	901.18	1,255.70	5,658.48	
203	Title I-A	ODE	9/30/2023	10,477.16	-	-	10,477.16		10,477.16	10,477.16	-	-	10,477.16	
203	Title I-A	ODE	9/30/2024	49,679.00	-	-	49,679.00		49,679.00	2,542.54	8,164.21	10,706.75		
	Title II-A Teacher Quality	ODE	9/30/2024	6,439.00	-	-	6,439.00		6,439.00	-	-	-		
	Title IV	ODE	9/30/2024	10,000.00	-	-	10,000.00		10,000.00	-	-	-		
203				76,595.16		-	76,595.16		76,595.16	13,019.70	8,164.21	21,183.91	55,411.25	
204	CNP Equipment Grant	ODE		-	-	-	-		-	-	-	-	-	
207	YTP	ESD	6/30/2024	38,493.70	-	-	38,493.70		38,493.70	9,018.19	22,954.49	31,972.68	6,521.02	
210	IDEA Part B 611	ODE	9/30/2024	16,528.60	-	834.50	15,694.10		16,528.60	-	-	-	-	
210	IDEA Part B 611	ODE	9/30/2025	94,298.00	-	-	94,298.00		94,298.00	-	-	-	-	
210				110,826.60		834.50	109,992.10		110,826.60	-	-	-	110,826.60	
216	IDEA Part B, Section 619 2021-22 ARP	ODE	9/30/2023	849.00	-	-	849.00		849.00	-	-	-	-	
	IDEA Part B, Section 619 PassThru 2022-23	ODE	9/30/2023	278.60	-	-	278.60		278.60	-	-	-	-	
	IDEA Part B, Section 619 PassThru 2022-23	ODE	9/30/2024	1,453.00	-	-	1,453.00		1,453.00	-	-	-	-	
216				2,580.60		-	2,580.60		2,580.60	-	-	-	2,580.60	
218	ATHLETICS PROGRAM			-	-	-	-		-	-	-	-	-	
219	Student Activity Funds			-	-	-	-		-	-	-	-	-	
226	Early Indicator Intervention	ODE	6/30/2023	2,765.00	-	-	2,765.00		2,765.00	-	-	-	2,765.00	
230	LEA ESSER	ODE	9/30/2023	65,974.11	-	65,974.11	-		65,974.11	65,974.11	-	65,974.11	-	
232	ESSER III	ODE	9/30/2024	172,510.72	-	-	172,510.72		172,510.72	110,868.73	58,604.87	169,473.60	3,037.12	
	Federal School Improvement Funds to CSI & TSI													
248	Schools 22-23	ODE	9/30/2024	85,011.15	-	-	85,011.15		85,011.15	8,142.42	76,869.58	85,012.00	(0.85)	
251	Student Investment Account	ODE	6/30/2025	755,500.00	-	-	755,500.00		755,500.00	60,996.95	505,517.90	566,514.85	188,985.15	
252	High School Success M98	ODE	6/30/2025	158,913.05	-	-	158,913.05		158,913.05	16,985.02	128,791.72	145,776.74	13,136.31	
257	Baseball/Softball Program			-	3,706.92	-	-		3,706.92	-	-	-	3,706.92	
259	Student Activity Funds			-	-	47,686.78	-		47,686.78	5,540.66	2,915.25	8,455.91	39,230.87	
263	Outdoor School			-	-	-	-		-	-	-	-	-	
267	TAP Asbestos Assessment	ODE	12/31/2023	25,000.00	-	-	25,000.00		25,000.00	-	-	-	25,000.00	
272	TAP Grant	ODE		-	-	-	-		-	5,725.00	-	5,725.00	(5,725.00)	
290	Bus Replacement Fund			-	33,225.19	169,319.13	-	259,000.00	461,544.32	99,829.00	46,699.00	146,528.00	315,016.32	
299	Nutrition Services			-	-	7,058.54	-	123,405.00	130,463.54	8,136.47	84,421.84	92,558.31	37,905.23	
	Local Food for Schools (LFS) 23-24	ODE	8/31/2024	1,316.95	-	-	1,316.95		1,316.95	-	-	-	1,316.95	
	TOTAL				40,285.74	294,433.61	1,428,678.43	382,405.00	2,145,802.78	404,590.77	935,840.04	1,340,430.81	805,371.97	

**DEBT SERVICE
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023**

		<u>ACTUAL</u>			TOTAL	BALANCE FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
		Y-T-D	Requisitio ns	ENCUMBERED			
		<u>BUDGET</u>	<u>9/30/2023</u>	<u>ENCUMBERED</u>	<u>9/30/2023</u>	<u>(UNFAVORABLE)</u>	<u>COMMITTED</u>
RESOURCES							
1111	CURRENT YEAR'S TAXES	\$ 91,400.00	\$ -		-	(91,400.00)	
1112	PRIOR YEAR'S TAXES	500.00	147.44		147.44	(352.56)	
1190	PRIOR YEAR'S TAXES	100.00	7.92		7.92	(92.08)	
1510	INTEREST EARNINGS	-	1.32		1.32	1.32	
5400	BEGINNING FUND BALANCE	18,000.00	21,603.87		21,603.87	3,603.87	
	TOTAL INSTRUCTION	110,000.00	21,760.55	-	21,760.55	(88,239.45)	
EXPENDITURES							
5110	Long-Term Debt Service						
5110 610	Redemption of Principal	30,000.00	-	-	-	30,000.00	
5110 621	Regular Interest	62,000.00	-	-	-	62,000.00	
7000	Unappropriated Ending Fund Balance	18,000.00	-	-	-	18,000.00	
	TOTAL EXPENDITURES	110,000.00	-	-	-	110,000.00	0.00%

CAPITAL PROJECTS (400)
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023

		<u>ACTUAL</u>		<u>TOTAL</u>	<u>BALANCE</u> <u>FAVORABLE/</u>	<u>--%--</u>	
		<u>Y-T-D</u>					
		<u>BUDGET</u>	<u>9/30/2023</u>	<u>ENCUMBERED</u>	<u>9/30/2023</u>	<u>(UNFAVORABLE)</u>	<u>COMMITTED</u>
RESOURCES							
1510	Interest Earnings	\$ -	\$ -		-	-	
5200	Transfer from General Fund	-	-		-	-	
5400	Beginning Fund Balance	274,747.25	274,747.25		274,747.25	-	
	TOTAL INSTRUCTION	274,747.25	274,747.25	-	274,747.25	-	
EXPENDITURES							
4150	Building Improvement	274,747.25	-	-	-	274,747.25	
7000	Unappropriated Ending Fund Balance	-	-	-	-	-	
	TOTAL EXPENDITURES	274,747.25	-	-	-	274,747.25	0.00%

BOND 2021 (410)
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023

		<u>ACTUAL</u>			<u>BALANCE</u>		
		<u>Y-T-D</u>		<u>TOTAL</u>	<u>FAVORABLE/</u>	<u>--%--</u>	
		<u>BUDGET</u>	<u>9/30/2023</u>	<u>ENCUMBERED</u>	<u>9/30/2023</u>	<u>(UNFAVORABLE)</u>	<u>COMMITTED</u>
RESOURCES							
1510	Interest Earnings	\$ 15,000.00	\$ 14,142.62		14,142.62	(857.38)	
3299	State Grant	\$ 2,100,000.00	-	2,100,000.00	2,100,000.00	-	
5400	Beginning Fund Balance	1,525,000.00	1,538,492.56		1,538,492.56	13,492.56	
	TOTAL INSTRUCTION	3,640,000.00	1,552,635.18	2,100,000.00	3,652,635.18	12,635.18	
EXPENDITURES							
4150	Building Improvement	3,640,000.00	411,834.14	1,167,445.02	1,579,279.16	2,060,720.84	
7000	Unappropriated Ending Fund Balance	-	-	-	-	-	
	TOTAL EXPENDITURES	3,640,000.00	411,834.14	1,167,445.02	1,579,279.16	2,060,720.84	43.39%

Alesea School District 7J
State School Support Formula History and Estimate

ODE

	Weight	21-22		22-23		Projected	23-24		Estimate		24-25	Possible Reduciton		
ADMr	1.00	934.77	934.77	501.68	501.68	481.53	459.00	459.00	287.00					
ESL	0.50	6.29	3.15	12.03	6.02	6.02	26.00	13.00	13.00					
Pregnant and Parenting	1.00	-	-	-	-	-	-	-	-					
IEP	1.00	86.00	86.00	55.18	55.18	55.18	50.49	50.49	31.57					
IEPs above 11%	1.00	2.30	2.30	2.30	2.30	2.3	2.30	2.30	2.30					
Students in Poverty	0.25	20.00	5.00	29.00	7.25	7.25	29.00	7.25	7.25					
Foster Care	0.25	2.00	0.50	1.00	0.25	0.25	1.00	0.25	0.25					
Remote Elementary	1.00	-	-	-	-	-	-	-	-					
Small High School	1.00	88.35	88.35	88.35	88.35	67.22	88.35	88.35	62.00					
Total ADMw			1,120.07		661.03	619.75		620.64	403.37					
Prior Yrs ADMw			959.14		1,120.07			661.03						
Greater ADMw Amt between Yrs			1,120.07		1,120.07			661.03	619.75		403.37	(216.38)		
Base Amount		\$	4,500.00	\$	4,500.00		\$	4,500.00	\$	4,500.00	\$	4,500.00		
Teacher Experience Base Amount		\$	25.00	\$	25.00		\$	25.00	\$	25.00	\$	25.00		
Experience			(4.32)		(4.32)			(4.32)		(4.32)		(4.32)		
Teacher Experience Amount			(108.00)		(108.00)			(108.00)		(108.00)		(108.00)		
Total Base Amount		\$	4,392.00	\$	4,392.00		\$	4,392.00	\$	4,392.00	\$	4,392.00		
Ratio			2.03681370200		2.13291914800			2.22906160000		2.22906160000		2.29593344800		
State School Funding Per ADMw		\$	8,945.69	\$	9,367.78		\$	9,790.04	\$	9,790.04	\$	10,083.74		
	Rounding	\$	1.00	Rounding	\$	1.00	Rounding	\$	46.00	\$	-	\$	-	
General Purpose Grant		\$	10,019,755	\$	10,492,524		\$	6,471,507	\$	6,067,377	\$	4,067,478		
Transportaiton			1,425,572.00		1,200,000.00			1,200,000.00		900,000.00		900,000.00		
Percent			80%		90%			90%		90%		90%		
Transportation Grant		\$	1,140,458.00	\$	1,080,000.00		\$	1,080,000.00	\$	810,000.00	\$	810,000.00		
Rounding			-6											
Total Formula Revenue		\$	11,160,207	\$	11,572,524		\$	7,551,507	\$	6,877,377	\$	4,877,478		
Less Local Collections														
Property Taxes			458,301.00		480,000.00			500,000.00		500,000.00		500,000.00		
Common School			48,709.00		63,817.04			62,743.82		62,743.82		62,743.82		
County School			8,805.00		6,500.00			6,500.00		6,500.00		6,500.00		
Federal Forest Fees			-		-			-		-		-		
Total Local Offsets		\$	515,815.00	\$	550,317.04		\$	569,243.82	\$	569,243.82	\$	569,243.82		
State School Support Payments		\$	10,644,392.00	\$	11,022,206.96		\$	6,982,263.18	\$	6,308,133.18	\$	4,308,234.18	\$	(1,999,899)

**GENERAL FUND
STATEMENT OF RESOURCES
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023**

<u>LINE</u>	<u>SOURCE</u>	<u>BUDGET</u>	<u>Y-T-D 9/30/2023</u>	<u>PROJECTED</u>	<u>TOTAL 9/30/2023</u>	<u>BALANCE OVER/(UNDER)</u>	
STATE SCHOOL SUPPORT FORMULA							
1	1111	CURRENT YEAR'S TAXES	\$ 499,000.00	\$ 1,085.79	497,914.21	\$ 499,000.00	\$ -
2	1112	PRIOR YEAR'S TAXES	1,000.00	14.84	985.16	1,000.00	-
3	1114	OTHER TAXES	-	-	-	-	-
4	1190	INTEREST ON TAX COLLECTIONS	800.00	156.00		156.00	(644.00)
5	2101	COUNTY SCHOOL FUND	2,500.00	1,666.58	4,833.42	6,500.00	4,000.00
6	3103	COMMON SCHOOL FUND	66,340.92	-	62,743.82	62,743.82	(3,597.10)
7	3101	STATE SCHOOL SUPPORT FUND	6,773,656.93	2,326,991.00	3,981,142.18	6,308,133.18	(465,523.75)
8	4801	FEDERAL FOREST FEES	-	-	-	-	-
9	TOTAL 2023-24 SSSF SOURCES (Line 1 - Line 8)		7,343,297.85	2,329,914.21	4,547,618.79	6,877,533.00	(465,764.85)
STATE SCHOOL SUPPORT FORMULA (Prior Yr Adjustments)							
10	STATE SCHOOL SUPPORT FUND 22-23					-	-
11	HIGH COST GRANT					-	-
12	TOTAL SSSF PRIOR YR ADJ (Line 10 - Line 11)		-	-	-	-	-
13	TOTAL SSSF SOURCES (Line 9 + Line 12)		7,343,297.85	2,329,914.21	4,547,618.79	6,877,533.00	(465,764.85)
NON STATE SCHOOL SUPPORT FORMULA SOURCES							
LOCAL SOURCES							
14	1412	TRANSPORTATION FEE FROM OTHER DISTRICTS	88,505.00	-	-	-	(88,505.00)
15	1510	EARNINGS ON INVESTMENTS	25,000.00	52,815.90	-	52,815.90	27,815.90
16	1910	RENTAL INCOME	12,000.00	-	-	-	(12,000.00)
17	1920	DONATIONS	6,000.00	-	-	-	(6,000.00)
18	1980	FEES CHARGED OTHER GRANTS	15,000.00	-	-	-	(15,000.00)
19	1990	MISCELLANEOUS REVENUE	23,800.00	9,233.18	-	9,233.18	(14,566.82)
20	1991	ERATE	1,000.00	-	-	-	(1,000.00)
21	TOTAL LOCAL SOURCES (Line 14 - Line 20)		171,305.00	62,049.08	-	62,049.08	(109,255.92)
OTHER SOURCES							
22	2102	REVENUE THROUGH ESD	4,000.00	-	-	-	(4,000.00)
23	3203	SPECIAL EDUCATION PROGRAMS	8,000.00	-	-	-	(8,000.00)
24	5300	INSURANCE REIMBURSEMENT	5,000.00	-	-	-	(5,000.00)
25	5400	BEGINNING CASH	2,999,999.65	4,378,189.76		4,378,189.76	1,378,190.11
26	TOTAL OTHER SOURCES (Line 22 - Line 26)		3,016,999.65	4,378,189.76	-	4,378,189.76	1,361,190.11
27	TOTAL NON SSSF SOURCES (Line 21 + Line 27)		3,188,304.65	4,440,238.84	-	4,440,238.84	1,251,934.19
28	TOTAL RESOURCES (Line 13 + Line 27)		\$ 10,531,602.50	\$ 6,770,153.05	\$ 4,547,618.79	\$ 11,317,771.84	\$ 786,169.34

**GENERAL FUND
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023**

		<u>BUDGET</u>	<u>ACTUAL Y-T-D 9/30/2023</u>	<u>Requisition s</u>	<u>ENCUMBERED</u>	<u>TOTAL 9/30/2023</u>	<u>BALANCE FAVORABLE/ (UNFAVORABLE)</u>	<u>--%-- COMMITTED</u>
INSTRUCTION								
1111	Elementary, K-5	1,346,195.00	95,730.03	260.71	824,109.28	919,839.31	426,355.69	
1113	Elementary Extra-curricular	-	-	-	-	-	-	
1121	Middle/Junior High Programs	518,950.00	21,446.88	28.30	206,928.31	228,375.19	290,574.81	
1122	Middle/Junior High School Extra-curricular	-	4,567.91	40.22	9,042.73	13,610.64	(13,610.64)	
1131	High School Programs	556,350.00	37,751.62	42.47	274,000.17	311,751.79	244,598.21	
1132	High School Extra-curricular	101,000.00	32,163.75	40.22	56,705.16	88,868.91	12,131.09	
1140	Pre-kindergarten Programs	-	239.56	-	480.44	720.00	(720.00)	
1210	Programs for the Talented and Gifted	3,499.50	-	-	-	-	3,499.50	
1250	Less Restrictive Programs: Students w/ Disability	1,192,450.00	134,511.49	7.10	500,125.82	634,637.31	557,812.69	
1280	Alternative Education	-	-	-	-	-	-	
1288	Charter Schools	21,000.00	-	-	-	-	21,000.00	
1291	English Second Language Programs	9,600.00	1,396.88	-	10,989.29	12,386.17	(2,786.17)	
TOTAL INSTRUCTION		3,749,044.50	327,808.12	419.02	1,882,381.20	2,210,189.32	1,538,855.18	58.95%
SUPPORT SERVICES								
2114	Student Accounting Services	53,920.00	-	-	-	-	53,920.00	
2134	Nurse Services	12,000.00	1,508.00	-	6,032.00	7,540.00	4,460.00	
2142	Psychological Testing Services	35,000.00	-	-	-	-	35,000.00	
2152	Speech Pathology Services	161,360.00	1,323.25	-	25,783.31	27,106.56	134,253.44	
2160	Other Student Treatment Services	28,000.00	790.00	-	-	790.00	27,210.00	
2190	Service Direction, Student Support Services	34,050.00	7,982.03	-	28,703.29	36,685.32	(2,635.32)	
2210	Improvement of Instruction Services	-	4,429.93	-	348.96	4,778.89	(4,778.89)	
2222	Library/Media Center	1,250.00	-	-	-	-	1,250.00	
2230	Assessment and Testing	6,848.00	697.77	-	3,488.97	4,186.74	2,661.26	
2240	Instructional Staff Development	1,000.00	-	-	-	-	1,000.00	
2310	Board of Education Services	162,200.00	39,167.43	-	150.00	39,317.43	122,882.57	
2321	Office of the Superintendent Services	335,100.00	87,605.40	830.33	205,009.08	292,614.48	42,485.52	
2410	Office of the Principal Services	507,070.00	95,626.83	-	270,706.25	366,333.08	140,736.92	
2520	Fiscal Services	369,900.00	40,061.87	60.91	181,974.32	222,036.19	147,863.81	

GENERAL FUND
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023

		<u>BUDGET</u>	<u>ACTUAL</u> <u>Y-T-D</u>	<u>Requisition</u> <u>s</u>	<u>ENCUMBERED</u>	<u>TOTAL</u> <u>9/30/2023</u>	<u>BALANCE</u> <u>FAVORABLE/</u> <u>(UNFAVORABLE)</u>	<u>--%--</u> <u>COMMITTED</u>
2540	Operation and Maintenance of Plant Services	613,500.00	163,469.01	2,286.34	263,700.07	427,169.08	186,330.92	
2550	Student Transportation Services	1,660,150.00	166,727.97	169.99	505,113.62	671,841.59	988,308.41	
2558	Special Education Transportation Services	-	546.31	-	-	546.31	(546.31)	
2660	Technology Services	92,400.00	41,362.29	1,807.60	45,335.97	86,698.26	5,701.74	
2700	Supplemental Retirement Program	-	2,497.92	-	7,657.20	10,155.12	(10,155.12)	
	TOTAL SUPPORT SERVICES	4,073,748.00	653,796.01	5,155.17	1,544,003.04	2,197,799.05	1,875,948.95	53.95%
OTHER REQUIREMENTS								
5110	Long-Term Debt Service	20,100.00	19,978.69	-	-	19,978.69	121.31	
5200	Transfers of Funds							
5200 790	Food Service	123,405.00	-	-	123,405.00	123,405.00	-	
5200 792	Bus Fund	259,000.00	-	-	259,000.00	259,000.00	-	
5200 795	Athletics	164,200.00	-	-	-	-	164,200.00	
6110	Operating Contingency	120,000.00	-	-	-	-	120,000.00	
7000	Unappropriated Ending Fund Balance	2,022,105.00	-	-	-	-	2,022,105.00	
	TOTAL OTHER REQUIREMENTS	2,708,810.00	19,978.69	-	382,405.00	402,383.69	2,306,426.31	14.85%
	TOTAL EXPENDITURES	\$ 10,531,602.50	\$ 1,001,582.82	\$ 5,574.19	\$ 3,808,789.24	\$ 4,810,372.06	\$ 5,721,230.44	45.68%

Special Revenue
Statement of Grants and Other Special Revenue Funds

				REVENUE						EXPENDITURES				
#	Fund Title	SOURCE	End Date	Grant Amount	Beginning		Y-T-D	PROJECTED	Transfer from General Fund	TOTAL	Y-T-D	ENCUMBERED	TOTAL	Balance
					Cash									
200	Donations				3,353.63		3,560.55			6,914.18	354.52	901.18	1,255.70	5,658.48
203	Title I-A	ODE	9/30/2023	10,477.16	-	-	-	10,477.16		10,477.16	10,477.16	-	10,477.16	
203	Title I-A	ODE	9/30/2024	49,679.00	-	-	-	49,679.00		49,679.00	2,542.54	8,164.21	10,706.75	
	Title II-A Teacher Quality	ODE	9/30/2024	6,439.00	-	-	-	6,439.00		6,439.00	-	-	-	
	Title IV	ODE	9/30/2024	10,000.00	-	-	-	10,000.00		10,000.00	-	-	-	
203				76,595.16			-	76,595.16		76,595.16	13,019.70	8,164.21	21,183.91	55,411.25
204	CNP Equipment Grant	ODE		-	-	-	-	-		-	-	-	-	-
207	YTP	ESD	6/30/2024	38,493.70	-	-	-	38,493.70		38,493.70	9,018.19	22,954.49	31,972.68	6,521.02
210	IDEA Part B 611	ODE	9/30/2024	16,528.60	-	-	834.50	15,694.10		16,528.60	-	-	-	-
210	IDEA Part B 611	ODE	9/30/2025	94,298.00	-	-	-	94,298.00		94,298.00	-	-	-	-
210				110,826.60			834.50	109,992.10		110,826.60	-	-	-	110,826.60
216	IDEA Part B, Section 619 2021-22 ARP	ODE	9/30/2023	849.00	-	-	-	849.00		849.00	-	-	-	-
	IDEA Part B, Section 619 PassThru 2022-23	ODE	9/30/2023	278.60	-	-	-	278.60		278.60	-	-	-	-
	IDEA Part B, Section 619 PassThru 2022-23	ODE	9/30/2024	1,453.00	-	-	-	1,453.00		1,453.00	-	-	-	-
216				2,580.60			-	2,580.60		2,580.60	-	-	-	2,580.60
218	ATHLETICS PROGRAM			-	-	-	-	-		-	-	-	-	-
219	Student Activity Funds			-	-	-	-	-		-	-	-	-	-
226	Early Indicator Intervention	ODE	6/30/2023	2,765.00	-	-	-	2,765.00		2,765.00	-	-	-	2,765.00
230	LEA ESSER	ODE	9/30/2023	65,974.11	-	-	65,974.11	-		65,974.11	65,974.11	-	65,974.11	-
232	ESSER III	ODE	9/30/2024	172,510.72	-	-	-	172,510.72		172,510.72	110,868.73	58,604.87	169,473.60	3,037.12
248	Federal School Improvement Funds to CSI & TSI Schools 22-23	ODE	9/30/2024	85,011.15	-	-	-	85,011.15		85,011.15	8,142.42	76,869.58	85,012.00	(0.85)
251	Student Investment Account	ODE	6/30/2025	755,500.00	-	-	-	755,500.00		755,500.00	60,996.95	505,517.90	566,514.85	188,985.15
252	High School Success M98	ODE	6/30/2025	158,913.05	-	-	-	158,913.05		158,913.05	16,985.02	128,791.72	145,776.74	13,136.31
257	Baseball/Softball Program			-	3,706.92	-	-	-		3,706.92	-	-	-	3,706.92
259	Student Activity Funds			-	-	-	47,686.78	-		47,686.78	5,540.66	2,915.25	8,455.91	39,230.87
263	Outdoor School			-	-	-	-	-		-	-	-	-	-
267	TAP Asbestos Assessment	ODE	12/31/2023	25,000.00	-	-	-	25,000.00		25,000.00	-	-	-	25,000.00
272	TAP Grant	ODE		-	-	-	-	-		-	5,725.00	-	5,725.00	(5,725.00)
290	Bus Replacement Fund			-	33,225.19	-	169,319.13	-	259,000.00	461,544.32	99,829.00	46,699.00	146,528.00	315,016.32
299	Nutrition Services			-	-	-	7,058.54	-	123,405.00	130,463.54	8,136.47	84,421.84	92,558.31	37,905.23
	Local Food for Schools (LFS) 23-24	ODE	8/31/2024	1,316.95	-	-	-	1,316.95		1,316.95	-	-	-	1,316.95
TOTAL					40,285.74		294,433.61	1,428,678.43	382,405.00	2,145,802.78	404,590.77	935,840.04	1,340,430.81	805,371.97

DEBT SERVICE
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023

		<u>BUDGET</u>	<u>ACTUAL</u> <u>Y-T-D</u>	<u>Requisitio</u> <u>ns</u>	<u>ENCUMBERED</u>	<u>TOTAL</u> <u>9/30/2023</u>	<u>BALANCE</u> <u>FAVORABLE/</u> <u>(UNFAVORABLE)</u>	<u>--%--</u> <u>COMMITTED</u>
RESOURCES								
1111	CURRENT YEAR'S TAXES	\$ 91,400.00	\$ -			-	(91,400.00)	
1112	PRIOR YEAR'S TAXES	500.00	147.44			147.44	(352.56)	
1190	PRIOR YEAR'S TAXES	100.00	7.92			7.92	(92.08)	
1510	INTEREST EARNINGS	-	1.32			1.32	1.32	
5400	BEGINNING FUND BALANCE	18,000.00	21,603.87			21,603.87	3,603.87	
	TOTAL INSTRUCTION	110,000.00	21,760.55	-	-	21,760.55	(88,239.45)	
EXPENDITURES								
5110	Long-Term Debt Service							
5110 610	Redemption of Principal	30,000.00	-	-	-	-	30,000.00	
5110 621	Regular Interest	62,000.00	-	-	-	-	62,000.00	
7000	Unappropriated Ending Fund Balance	18,000.00	-	-	-	-	18,000.00	
	TOTAL EXPENDITURES	110,000.00	-	-	-	-	110,000.00	0.00%

CAPITAL PROJECTS (400)
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023

		<u>ACTUAL</u>		<u>TOTAL</u>	<u>BALANCE</u> <u>FAVORABLE/</u>	<u>--%--</u>
		<u>Y-T-D</u>				
		<u>BUDGET</u>	<u>9/30/2023</u>	<u>9/30/2023</u>	<u>(UNFAVORABLE)</u>	<u>COMMITTED</u>
RESOURCES						
1510	Interest Earnings	\$ -	\$ -	-	-	
5200	Transfer from General Fund	-	-	-	-	
5400	Beginning Fund Balance	274,747.25	274,747.25	274,747.25	-	
	TOTAL INSTRUCTION	274,747.25	274,747.25	274,747.25	-	
EXPENDITURES						
4150	Building Improvement	274,747.25	-	-	274,747.25	
7000	Unappropriated Ending Fund Balance	-	-	-	-	
	TOTAL EXPENDITURES	274,747.25	-	-	274,747.25	0.00%

BOND 2021 (410)
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2023-24
As of September 30, 2023

		<u>ACTUAL</u>		<u>TOTAL</u>	<u>BALANCE FAVORABLE/ (UNFAVORABLE)</u>	<u>--%--</u>	
		<u>Y-T-D</u>					
		<u>BUDGET</u>	<u>9/30/2023</u>	<u>ENCUMBERED</u>	<u>9/30/2023</u>	<u>(UNFAVORABLE)</u>	<u>COMMITTED</u>
RESOURCES							
1510	Interest Earnings	\$ 15,000.00	\$ 14,142.62		14,142.62	(857.38)	
3299	State Grant	\$ 2,100,000.00	-	2,100,000.00	2,100,000.00	-	
5400	Beginning Fund Balance	1,525,000.00	1,538,492.56		1,538,492.56	13,492.56	
	TOTAL INSTRUCTION	3,640,000.00	1,552,635.18	2,100,000.00	3,652,635.18	12,635.18	
EXPENDITURES							
4150	Building Improvement	3,640,000.00	411,834.14	1,167,445.02	1,579,279.16	2,060,720.84	
7000	Unappropriated Ending Fund Balance	-	-	-	-	-	
	TOTAL EXPENDITURES	3,640,000.00	411,834.14	1,167,445.02	1,579,279.16	2,060,720.84	43.39%

**Alesea School District 7J
State School Support Formula History and Estimate**

ODE													
	<u>Weight</u>	<u>21-22</u>		<u>22-23</u>		<u>Projected</u>	<u>23-24</u>		<u>Estimate</u>	<u>24-25</u>	<u>Possible Reduction</u>		
ADMw	1.00	934.77	934.77	501.68	501.68	481.53	459.00	459.00	287.00				
ESL	0.50	6.29	3.15	12.03	6.02	6.02	26.00	13.00	13.00				
Pregnant and Parenting	1.00	-	-	-	-	-	-	-	-				
IEP	1.00	86.00	86.00	55.18	55.18	55.18	50.49	50.49	31.57				
IEPs above 11%	1.00	2.30	2.30	2.30	2.30	2.3	2.30	2.30	2.30				
Students in Poverty	0.25	20.00	5.00	29.00	7.25	7.25	29.00	7.25	7.25				
Foster Care	0.25	2.00	0.50	1.00	0.25	0.25	1.00	0.25	0.25				
Remote Elementary	1.00	-	-	-	-	-	-	-	-				
Small High School	1.00	88.35	88.35	88.35	88.35	67.22	88.35	88.35	62.00				
Total ADMw			1,120.07		661.03	619.75		620.64	403.37				
Prior Yrs ADMw			959.14		1,120.07			661.03					
Greater ADMw Amt between Yrs			1,120.07		1,120.07			661.03	619.75	403.37	(216.38)		
Base Amount		\$	4,500.00	\$	4,500.00		\$	4,500.00	\$	4,500.00	\$	4,500.00	
Teacher Experience Base Amount		\$	25.00	\$	25.00		\$	25.00	\$	25.00	\$	25.00	
Experience			(4.32)		(4.32)			(4.32)		(4.32)		(4.32)	
Teacher Experience Amount			(108.00)		(108.00)			(108.00)		(108.00)		(108.00)	
Total Base Amount		\$	4,392.00	\$	4,392.00		\$	4,392.00	\$	4,392.00	\$	4,392.00	
Ratio			2.03681370200		2.13291914800			2.22906160000		2.22906160000		2.29593344800	
State School Funding Per ADMw		\$	8,945.69	\$	9,367.78		\$	9,790.04	\$	9,790.04	\$	10,083.74	
General Purpose Grant		Rounding	\$	1.00	Rounding	\$	1.00	Rounding	\$	46.00	\$	-	
			\$	10,019,755		\$	10,492,524		\$	6,471,507	\$	6,067,377	
			\$	10,019,755		\$	10,492,524		\$	6,471,507	\$	6,067,377	
Transportation			1,425,572.00		1,200,000.00			1,200,000.00		900,000.00		900,000.00	
Percent			80%		90%			90%		90%		90%	
Transportation Grant		\$	1,140,458.00	\$	1,080,000.00		\$	1,080,000.00	\$	810,000.00	\$	810,000.00	
Rounding			-6										
Total Formula Revenue		\$	11,160,207	\$	11,572,524		\$	7,551,507	\$	6,877,377	\$	4,877,478	
Less Local Collections													
Property Taxes			458,301.00		480,000.00			500,000.00		500,000.00		500,000.00	
Common School			48,709.00		63,817.04			62,743.82		62,743.82		62,743.82	
County School			8,805.00		6,500.00			6,500.00		6,500.00		6,500.00	
Federal Forest Fees			-		-			-		-		-	
Total Local Offsets		\$	515,815.00	\$	550,317.04		\$	569,243.82	\$	569,243.82	\$	569,243.82	
State School Support Payments		\$	10,644,392.00	\$	11,022,206.96		\$	6,982,263.18	\$	6,308,133.18	\$	4,308,234.18	
			\$	10,644,392.00	\$	11,022,206.96		\$	6,982,263.18	\$	6,308,133.18	\$	4,308,234.18
											\$	(1,999,899)	

f. Bond Update - Chris and Nancy Giggy



Alsea School District Bond Projects Construction Manager's Report

Report Date: October 6, 2023

GENERAL OVERVIEW

Construction began mid-March on the Electrical Upgrade and Panel Room projects. The Panel Room has had significant delays but is now expected to be complete by the end of October. Much of the Electrical Upgrade work will be completed by November but a large part of the work involves replacing panels and routing new wiring to the panel room which can't be completed with school in session. We're still being told the main switchgear won't be delivered before April 2024 so the new systems can't be energized until that is installed.

For the HVAC Upgrade project, power connections are being completed to the heat pump rooftop units in October. They're making connections from rooftop units to classroom units after hours during October and November. Hallway fresh air units and ducts should also be installed by the end of November with work occurring after hours and on Fridays when school is out. The new gym HVAC unit and duct can't be installed until next summer when school is out, so heat isn't disrupted in the gym. All the systems will be operational when the switchgear arrives, and the power upgrades are completed in June 2024.

Final design for the new CTE building will be completed for bidding and permit in December with a goal of starting construction in early 2024 and completion that summer. Early bid documents for underground utilities, slab and building erection have been requested by the first week of November to meet the funding schedule requirements for the OSCIM grant. In the meantime, we're pre-qualifying general contractors to create a select list of good local bidders. Qualifications will be received October 10, and the review committee will meet October 16 to finalize the approved list of companies who can bid.

The application for a seismic grant is in progress and will be submitted to the State in the late-2023 cycle with award expected in spring of 2024. If successful, design will start by summer 2024 with a goal of completing construction during summer 2025. The District is also eligible for a TAP grant in early 2024 to fund the seismic grant assessment and application so there will be no impact to the District's budget even if the grant isn't awarded. There are a number of elements to the application, one of which is a letter of support from the School Board and other entities. We're working with the Superintendent to gather these items.

PROJECT TEAM

No new changes. CB Construction has shown some improvement and has met the requirements of the District's recent non-conformance letter. However, they will not be utilized as the contractor for the CTE Building because of their poor performance.

INTEGRITY MANAGEMENT SOLUTIONS LLC
18525 Van Horn Road, Alsea, Oregon 97324
(541) 452-1919 (541) 760-5885

Alsea School District Bond Program
Construction Manager's Report

BUDGET

The updated Budget Summary for bond project revenue and expenses is attached. Comments on revenue and expense elements are noted below.

Revenue

The current program budget is \$4.68 million including ESSER funds and the OSCIM grant that doubles the value of the bond amount. Bond interest is being added to the income budget as it's earned.

Expenses

The "Current Budget" column in Expenses shows the projected costs matched to the Revenue budget. There is \$1.93 million available for construction of the CTE Building or other uncommitted projects including \$200k in Owner's Contingency for unforeseen costs on all projects.

The "Committed Costs" column shows the value of work that has been contracted so far. \$7k for additional Geotech testing of the CTE area excavation and rock was added to Consultant Fees in the last month.

The "Paid to-Date" column shows the value of work that has been paid for. To-date, \$1.4 million has been spent on completed work.

SCHEDULE

CB Construction continues to have multiple delays on completion of the Panel Room but now expects project completion by the end of October. This delay is not affecting the Power Upgrade project because switchgear for the panel room doesn't arrive until next April or May.

The main switchgear for the Electrical Upgrade has a long lead time and is not expected to arrive until April or May 2024. The electrician will complete as much work as possible by the end of October and then pull off the project until April. The new power systems are projected to be completed in June 2024.

HVAC system installation is projected to be completed in November except for the gym unit and duct which can't be installed until June 2024 when the gym is no longer being used. New HVAC equipment can't be energized until next June when the switchgear mentioned above is installed so the delays have no impact on the overall project schedule or cost.

The CTE Building is in final design. There have been several coordination meetings with the CTE teacher during the last month and final details are being resolved. The architect will prepare complete construction documents by the end of December. An early bid package for underground utilities and procurement of metal building components will be issued by early November to meet OSCIM grant schedule requirements. Our goal is to complete construction of the new CTE Building by the end of summer 2024.

PROJECT-SPECIFIC ACTIVITY

Electrical Upgrade & Panel Room

Door install, exterior flashings and other finishes are still pending. There are on-going construction quality issues we're resolving with the contractor.



HVAC Upgrade

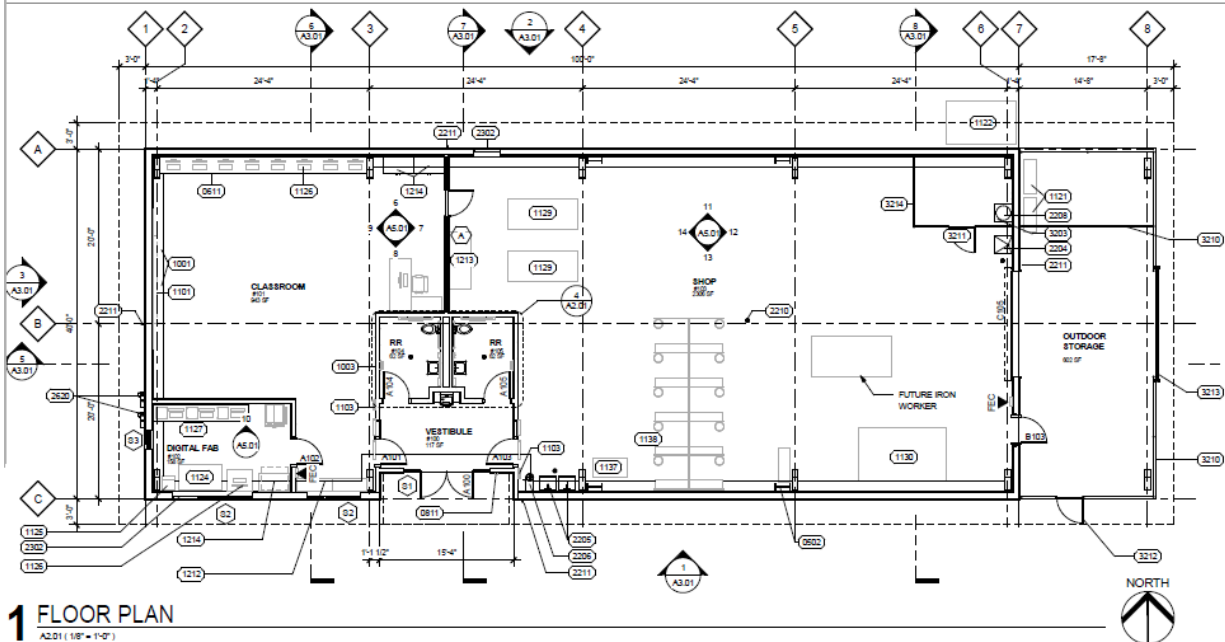
Heat pump units are installed in classrooms. Electrical and plumbing connections are pending.



Alea School District Bond Program Construction Manager's Report

CTE Building

The most recent elevation and floor plan for the building are shown below. Details for architectural, civil, structural, mechanical, electrical and plumbing are being coordinated and resolved during regular design meetings.



COMMUNICATIONS

IMS Monthly Reports are being provided to the Bond Oversight Committee and the School Board each month. No BOC meetings are currently scheduled as members have been invited to participate in the Vocation Building design meetings. An article relaying bond progress is being prepared for the next issue of the Alsea Valley Voice.

Alea School Bond Project Budget Summary - Updated October 6, 2023

Income

	Original Budget	Current Budget	Actual Income To-Date	Notes
Bond Sale	\$ 2,100,000.00	\$ 2,289,477.00	\$ 2,289,477.00	Bond value \$2.1M plus premium of \$189,477
Bond Fund Interest		\$ 59,996.91	\$ 59,996.91	Interest on bond proceeds updated October 2023.
OSCIM Grant	\$ 2,100,000.00	\$ 2,100,000.00	\$ -	Amount verified with State 1/23; contingent on spending this amount by 3/24
ESSER Funds	\$ -	\$ 232,879.26	\$ 68,251.41	ESSER II \$68,251.41 (spent 9/23) and ESSER III \$164,627.85 (spend by 9/24) after "unfinished learning" deductions
Totals	\$ 4,200,000.00	\$ 4,682,353.17	\$ 2,417,725.32	

Expenses

	Original Budget	Current Budget	Committed Costs	Paid To-Date	Notes
Construction Cost		\$ 3,811,928.26	\$ 2,110,778.22	\$ 1,012,748.09	Budget is based on available funds. Committed costs are for contracts approved to-date.
Design Fees		\$ 400,575.00	\$ 400,575.00	\$ 191,859.00	Committed costs includes fees for geotech, survey and haz material study.
Consultant Fees		\$ 50,000.00	\$ 44,710.00	\$ 15,015.17	Fees for soil testing, special inspections, commissioning and misc consulting.
Project Management		\$ 62,000.00	\$ 62,000.00	\$ 40,040.00	IMS not-to-exceed fee.
Permits & Fees		\$ 40,000.00	\$ 19,716.11	\$ 19,716.11	Permit and site plan fees; no SDCs per County.
Furnishings		\$ -	\$ -	\$ -	Furnishings, equipment, computers, etc. are either in possession or being funded separately.
Other Project Costs		\$ 117,849.91	\$ 117,849.91	\$ 117,849.91	Attorney, bank fees & advertising paid. Builder's risk insurance not included yet.
Owner's Contingency		\$ 200,000.00	NA	NA	For unforeseen costs based on current construction budget.
Totals	\$ -	\$ 4,682,353.17	\$ 2,755,629.24	\$ 1,397,228.28	

g. Enrollment Report

Alsea School District - Enrollment Totals

Grade Level

2023-24

2022-23

	2023-24							2022-23											
	Sept 1	Oct 1	Nov 1	Dec 1	Jan 1	Feb 1	Mar 1	Apr 1	May 1	June 1	Sept 1	Oct 1	Nov 1	Dec 1	Jan 1	Feb 1	Mar 1	Apr 1	May 1
KG	20	20									58	62	60	61	60	56	55	53	50
1st	37	42									56	66	64	66	64	60	60	58	54
2nd	37	36									42	41	41	45	43	38	36	35	32
3rd	30	32									43	50	54	53	51	46	46	46	45
4th	24	25									37	41	47	47	47	43	42	40	39
5th	23	24									29	32	36	36	36	29	29	26	24
6th	14	13									35	45	49	49	46	43	37	34	34
7th	20	20									44	59	59	61	59	56	56	52	48
8th	15	13									41	51	53	52	50	44	42	42	41
9th	22	23									14	14	13	13	12	12	12	12	13
10th	12	12									17	16	16	16	16	15	15	14	14
11th	13	14									21	21	21	22	20	20	20	19	17
12th	13	13									25	24	22	22	21	20	20	15	14
Total ADM	280	287									462	522	535	543	525	482	470	446	425

June 1

49
53
30
44
39
23
33
41
39
12
13
17
14

407

ENROLLMENT															
Grade	In building/ Online Program	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
As of 9/1/22	In building	20	16	20	24	21	19	18	17	26	14	17	21	25	258
As of 9/1/22	Learn at Home OR	38	40	22	19	16	10	17	27	15	0	0	0	0	204
As of 9/1/22	TOTAL	58	56	42	43	37	29	35	44	41	14	17	21	25	462
As of 10/1/22	In building	20	16	16	23	21	17	16	16	24	14	16	21	24	244
As of 10/1/22	Learn at Home OR	42	50	25	27	20	15	29	43	27	0	0	0	0	278
As of 10/1/22	TOTAL	62	66	41	50	41	32	45	59	51	14	16	21	24	522
As of 11/1/22	In building	20	17	16	23	22	18	18	17	25	13	16	21	22	248
As of 11/1/22	Learn at Home OR	40	47	25	31	25	18	31	42	28	0	0	0	0	287
As of 11/1/22	TOTAL	60	64	41	54	47	36	49	59	53	13	16	21	22	535
As of 12/1/22	In building	20	17	16	23	22	18	18	17	24	13	16	22	22	248
As of 12/1/22	Learn at Home OR	41	49	29	30	25	18	31	44	28	0	0	0	0	295
As of 12/1/22	TOTAL	61	66	45	53	47	36	49	61	52	13	16	22	22	543
As of 01/01/23	In building	20	17	16	23	22	18	18	16	24	12	16	20	21	243
As of 01/01/23	Learn at Home OR	40	47	27	28	25	18	28	43	26	0	0	0	0	282
As of 01/01/23	TOTAL	60	64	43	51	47	36	46	59	50	12	16	20	21	525
As of 02/1/23	In building	18	16	15	22	22	16	18	15	21	12	15	20	20	230
As of 02/1/23	Learn at Home OR	38	44	23	24	21	13	25	41	23	0	0	0	0	252
As of 02/1/23	TOTAL	56	60	38	46	43	29	43	56	44	12	15	20	20	482
As of 03/01/23	In building	18	16	14	22	22	16	18	15	21	12	15	20	20	229
As of 03/01/23	Learn at Home OR	37	44	22	24	20	13	19	41	21	0	0	0	0	241
As of 03/01/23	TOTAL	55	60	36	46	42	29	37	56	42	12	15	20	20	470
As of 04/01/23	In building	18	16	14	22	22	15	18	15	21	12	14	19	15	221
As of 04/01/23	Learn at Home OR	35	42	21	24	18	11	16	37	21	0	0	0	0	225
As of 04/01/23	TOTAL	53	58	35	46	40	26	34	52	42	12	14	19	15	446
As of 05/01/23	In building	16	15	14	21	22	14	18	14	21	13	14	17	14	213
As of 05/01/23	Learn at Home OR	34	39	18	24	17	10	16	34	20	0	0	0	0	212
As of 05/01/23	TOTAL	50	54	32	45	39	24	34	48	41	13	14	17	14	425
As of 06/01/23	In building	16	15	14	21	22	14	18	14	21	12	13	17	14	211
As of 06/01/23	Learn at Home OR	33	38	16	23	17	9	15	27	18	0	0	0	0	196
As of 06/01/23	TOTAL	49	53	30	44	39	23	33	41	39	12	13	17	14	407

5. New Business

a. Division 22 Standards



Division 22 Standards Assurances for the 2022-23 School Year

October 12, 2023

Krista Nieraeth, Superintendent

Overview

What are the Division 22 Standards?



- All Oregon administrative rules (OARs) set out in Chapter 581, Division 22, Standards for Public Elementary and Secondary Schools.

Example: 581 - 022 - 0102 Definitions

Ch.	Div.	Rule
Title		

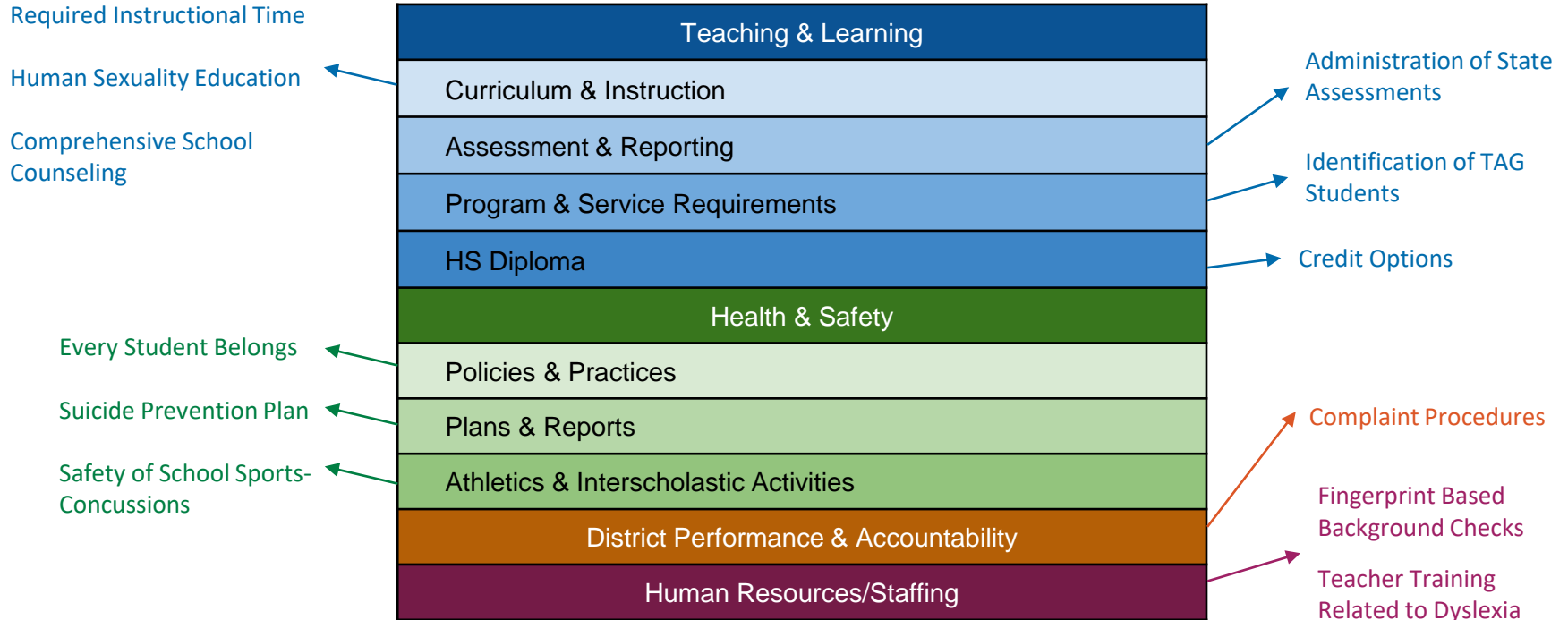
- The standards that the Oregon legislature or the State Board has determined must be met in order to be a standard school district.
- Compliance with these rules ensures a baseline level of service across the state.

Division 22 Rule Categories

Division 22 standards include over 50 rules.

Teaching & Learning
Curriculum & Instruction
Assessment & Reporting
Program & Service Requirements
HS Diploma
Health & Safety
Policies & Practices
Plans & Reports
Athletics & Interscholastic Activities
District Performance & Accountability
Human Resources/Staffing

Snapshot: Division 22 Rules



What are the requirements for each of the rules?

Consult the following resources for information:

<u>ODE's Rules at a Glance Summary</u>	Provides a high level summary of each rule
<u>Secretary of State's Oregon Administrative Rules Database</u>	Consult the text of the OAR for all of the specific details
<u>ODE's Division 22 Standards Newsletter</u>	Biannual publication that highlights new/revised rules, clarifies existing rules; provides insights on how the standards intersect with current issues and trends in K-12 education, as well as resources and promising practices

What are the Division 22 Standards Assurances?

Combined Accountability Model

Districts report annually on compliance with each of the standards, and include an explanation and corrective action plan for any rule with which the district is out of compliance.

Local Accountability

Districts must:

- report to their local school board by Nov 1
- make a report available on the district website by Nov 1



State Accountability

- Districts must submit assurances to ODE by Nov 15
- ODE reviews all submissions and follows up with districts that have self-reported as being out of compliance



Division 22 Standards & Assurances of Compliance

“Our Why”

- Signals our commitment to providing a high-quality educational experience and equitable opportunities for all students.
- Division 22 standards articulate the floor of the education to be provided to students, not the ceiling.
- Assurances process offers an opportunity for districts not in compliance to reflect on areas in need of attention and receive technical assistance.



What happens if the district is out of compliance?



- ODE reviews the district's proposed corrective action plan and either approves or rejects it
- If the plan is not approved as submitted, ODE contacts the district and provides technical assistance and support
- Once the district has an approved plan in place, ODE specialists may continue to provide support, as needed
- The corrective action must be complete by the beginning of the next school year
- If a district fails to come back into compliance after an opportunity for corrective action, ODE may withhold a portion of the district's State School Fund monies

Report for the 2022-23 School Year

Division 22 Standard Waivers for 2022-23

- [581-022-2115\(3\) Assessment of Essential Skills:](#)
 - **Essential Skills Graduation Requirements** are waived for students graduating in the 2022-2023 and 2023-2024 school years.
 - Note: Local Performance Assessment requirement in Section (2) remains in effect.
- [OAR 581-022-2265](#) Report on PE Data
 - **PE Data collections** were suspended last year. Districts will be required to submit data for the upcoming 2023-24 SY.



Rules That Were New in 2022-23

581-022-2308 Agreements Entered Into with Voluntary Organizations

Requires adoption of a policy governing participation in a voluntary organization that administers interscholastic activities. Voluntary organization must adopt and implement policies prohibiting discrimination, maintain a complaint process with sanctions, and administer an annual survey.

581-022-0107 Operational Plans for the 2022-23 School Year (not a new requirement)

School districts and public charter schools must periodically submit to the Department a plan for operation during the 2022-23 school year. The plan must be submitted on a form and on a timeline to be determined by the Department.

District Report on Compliance with Division 22 Standards

MS PE – Compliant

Required Instructional Time – Compliant

TAG Program – Compliant

Assessment and Reporting – Compliant

SPED and TAG requirements – Compliant

Policies – Diploma Types, Every Student Belongs, Child Abuse, Suicide Prevention Plan, etc.

Corrective Action Implemented

K – 5 PE – Scheduling to ensure enough minutes are had each week – 120 minutes per week

Evaluation System – Was not fully implemented. Bits and pieces were, but not fully implemented

Looking Ahead: Compliance for the 2023-24 SY

New/Revised Rules & Requirements



OAR 581-022-2263 Physical Education Requirements

[HB 3199](#), which reduces the total number of physical education instructional minutes required in grades 6-8, was passed just before the close of the 2023 legislative session. The bill revises ORS 329.496 to include two significant changes:

1. The weekly time requirement was reduced from 225 minutes every week of the year.
2. The new weekly minimum of 150 minutes is calculated as an average over the duration of the school year.

This provision went into effect on July 1, 2023

For a 4-day school week, there is an average of 120 minutes per week over the course of the school year.

New/Revised Rules & Requirements

OAR 581-022-2220 Health Services

Last revised in 1996, much of the rule's language has been updated to reflect learning from the last three years of school operations and to bring the rule into alignment with current statutes and rules.

The revised rule will be in effect for the 2023-2024 academic year. Districts will first report on their compliance with the revised rule as part of [Division 22 Standards annual assurances](#) in November of 2024.



Potential Rule Changes



Oregon Department of Education

The following changes are being considered by the State Board of Education and may be adopted at the October meeting:

- **Assessment of Essential Skills graduation requirement:** proposed extension of the suspension of this requirement through the 2027-28 school year
- **Menstrual Dignity for Students:** links requirements of the [Menstrual Dignity for Students](#) rules (OAR 581-021-0587 through OAR 581-021-0596) to Division 22

Aalsea School District

Report on Compliance with Public School Standards

2022-23 School Year

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

The table below contains a summary of **Aalsea** School District’s compliance with each of the requirements of Oregon’s administrative rules found in [DIVISION 22 - STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS](#) during the 2022-23 school year. For each rule reported as out of compliance, **Aalsea** School District has provided an explanation of why the school district was out of compliance and the school district’s proposed corrective action plan to come into compliance. The corrective action must be approved by ODE and completed by the district by the beginning of the 2024-25 school year.

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

Category: Teaching & Learning

Subcategory: Curriculum & Instruction

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2030 District Curriculum	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2045- Prevention Education in Drugs and Alcohol	In compliance	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2050 Human Sexuality Education	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2055 Career Education	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2060 Comprehensive School Counseling	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2263 Physical Education Requirements *Elementary Grades	Implementing approved corrective action	The district did not have the correct amount of minutes per week for this rule #	Work to increase PE time during the school day through scheduling. June 2023
581-022-2263 Physical Education Requirements *Middle Grades	In Compliance with both 2022-23 requirements (225/week) and revised requirements (150/week average)	The district has met all of the requirements for this rule.	Not applicable
581-022-2320 Required Instructional Time	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2340 Media Programs	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2500 Programs and Services for TAG Students	In compliance	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2350 Independent Adoptions of Instructional Materials	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2355 Instructional Materials Adoption	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2360 Postponement of Purchase of State-Adopted Instructional Materials	In compliance	The district has met all of the requirements for this rule.	Not applicable

Subcategory: Assessment & Reporting

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2100 Administration of State Assessments	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2110 Exception of Students with Disabilities from State Assessments	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2115 Assessment of Essential Skills: Diploma Requirements	Waived for 2022-23 school year	Not applicable	Not applicable
581-022-2115(2) Assessment of Essential Skills: Local Performance Assessment Requirement	In compliance	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2120 Essential Skill Assessments for English Language Learners	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2270 Individual Student Assessment, Recordkeeping and Reporting	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2445 Universal Screenings for Risk Factors of Dyslexia	In compliance	The district has met all of the requirements for this rule.	Not applicable

Subcategory: Program & Service Requirements

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2315 Special Education for Children with Disabilities	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2325 Identification of Academically Talented and Intellectually Gifted Students	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2330 Rights of Parents of TAG Students	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2505 Alternative Education Programs	In compliance	The district has met all of the requirements for this rule.	Not applicable

Subcategory: High School Diploma

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2000 Diploma Requirements	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2005 Veterans Diploma	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2010 Modified Diploma	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2015 Extended Diploma	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2020 Alternative Certificate	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2025 Credit Options	In compliance	The district has met all of the requirements for this rule.	Not applicable

Category: Health & Safety

Subcategory: Policies & Practices

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2205 Policies on Reporting of Child Abuse	In compliance	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2220 Health Services	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2310 Equal Education Opportunities	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2312 Every Student Belongs	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2345 Auxiliary Services	In compliance	The district has met all of the requirements for this rule.	Not applicable

Subcategory: Plans & Reports

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-0107 Operational Plans for the 2022-23 School Year	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2223 Healthy and Safe Schools Plan	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2225 Emergency Plans and Safety Programs	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2230 Asbestos Management Plans	In compliance	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2267 Annual Report on Restraint and Seclusion	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2510 Suicide Prevention Plan	In compliance	The district has met all of the requirements for this rule.	Not applicable

Subcategory: Athletics & Interscholastic Activities

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2210 Anabolic Steroids and Performance Enhancing Substances	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2215 Safety of School Sports – Concussions	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2308 Agreements Entered Into with Voluntary Organizations	In compliance	The district has met all of the requirements for this rule.	Not applicable

Category: District Performance & Accountability

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2250 District Improvement Plan	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2255 School and District Performance Report Criteria	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2260- Records and Reports	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2265 Report on PE Data	Waived for 2022-23 school year	Not applicable	Not applicable
581-022-2300 Standardization	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2305 District Assurances of Compliance with Public School Standards	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2370 Complaint Procedures	In compliance	The district has met all of the requirements for this rule.	Not applicable

Category: Human Resources/Staffing

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2335 Daily Class Size	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2400 Personnel	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2405 Personnel Policies	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2410 Teacher and Administrator Evaluation and Support	Implementing approved corrective action	Evaluation Cycle not fully completed	District implemented evaluation system and was training staff on how to effectively use it but was not fully implemented. Will be fully implemented in Fall 2023
581-022-2415 Core Teaching Standards	In compliance	The district has met all of the requirements for this rule.	Not applicable
581-022-2420 Educational Leadership - Administrator Standards	Implementing approved corrective action	Evaluation Cycle not fully completed	District implemented evaluation system and was training staff on how to effectively use it, but it was not fully implemented. Will be fully implemented in Fall 2023
581-022-2430 Fingerprinting of Subject Individuals in Positions Not Requiring Licensure as Teachers.	In compliance	The district has met all of the requirements for this rule.	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
Administrators, Personnel Specialists, School Nurses			
581-022-2440 Teacher Training Related to Dyslexia	In compliance	The district has met all of the requirements for this rule.	Not applicable

b. Type 20 Bus Approval - Resolution 24-04

**RESOLUTION TO PURCHASE 14-PASSENGER BUS AND INCREASE BUS RESERVE
APPROPRIATIONS**

WHEREAS the Alsea School District (“District”) has sold six buses to Falls City School District for \$168,417 as part of the termination agreement with Kings Valley Charter School; and

WHEREAS the availability of bus drivers for regular sized buses is limited to drive student athletes to away games; and

WHEREAS the availability of bus drivers and the Kings Valley terminating its agreement with Alsea School District was unknown when preparing and adopting the 2023-24 annual budget, and

WHEREAS athletic coaches who receive Type-10 training will be able to drive 14-passenger vans; and

WHEREAS the bus cost is \$117,710 and is considered an intermediate procurement requiring three quotes; and

WHEREAS the Salem Keizer School District has a cooperative contract, which the Alsea School District can use to purchase the bus; and

WHEREAS, if the District receives non-tax funds, Oregon Revised Statute 294.338(3) and the above conditions were not known at the time of the preparation of the 2023-24 annual budget, the Board of Directors may increase appropriations in a Special Revenue Fund by adopting a resolution for a specific purpose;

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors of Alsea School District authorizes the District to purchase the 14-passenger bus and to approve the recognition of additional resources and related appropriations as follows”

Resource	
Special Revenue Fund (Fund 290.0000.5300.000.000.000)	
5300 Sale of Fixed Assets	\$ 117,710
	\$ 117,710
Appropriation	
Special Revenue Fund (Fund 290) (Bus Reserve)	
2000 Support Services	\$ 117,710
	\$ 117,710

PASSED AND ADOPTED at a regular meeting of the Board of Directors of Alsea School District 7J on the ___ day of **October**, 2023 by the following vote:

AYES: _____ NAYS: _____ ABSENT: _____ ABSTAIN: _____

Risteen Follett, Chair Board of Directors
Superintendent

Krista Nieraeth,

Lora Nickle, Executive Secretary

c. Athletic Resolution 24-05

Alea School District 7J

RESOLUTION 24-05

RESOLUTION TO TRANSFER APPROPRIATIONS FY23-24

WHEREAS the Alea School District Board of Directors has adopted appropriations for athletic program within the Special Revenue Fund in the amount of \$171,700; and

WHEREAS the Alea School District Board of Directors has adopted appropriations for a transfer from the General Fund to the Special Revenue Fund to cover the athletic program expenditures in the amount of \$164,200 and local resources in the Special Revenue Fund in the amount of \$7,500; and

WHEREAS in prior fiscal years, the athletic program appropriations and resources have been budgeted in the General Fund, and is funded by General Fund resources; and

WHEREAS the Alea School District administration is recommending that the athletic program continue to be recorded in the General Fund; and

WHEREAS the ORS 294.463 allows the transfer of appropriations within a fund and between funds when authorized by the Alea School District Board of Directors.

BE IT RESOLVED that the Board of Directors of the Alea School District hereby transfers \$164,200 of General Fund Function 5200 (Transfers) to General Fund Function 1000 (Instruction Services) appropriations; and

BE IT RESOLVED that the Board of Directors of the Alea School District hereby transfers \$7,500 of Special Revenue Fund Function 1000 (Instruction) to the General Fund Function 1000 (Instruction Services) appropriations, and a local resources (1000) from the Special Revenue to the General Fund in the same amount; and

NOW THEREFORE, be it resolved that the Board of Directors approve recognition of the appropriation transfer as follows:

General Fund	Adopted	Transfer Amount	Revised
Instruction	3,749,045	171,700	3,920,745
Support Services	4,073,748		4,073,748
Transfers	546,605	-164,200	382,405
Debt Service	20,100		20,100
Contingency	120,000		120,000
	8,509,498	7,500	8,516,998

Alsea School District 7J

Special Revenue Fund	Adopted	Transfer Amount	Revised
Instruction Services	1,314,728	-7,500	1,307,228
Support Services	436,764		436,764
Enterprise & Community Services	289,260		289,260
Facility Acquisition Services	233,052		233,052
Debt Service	249,425		249,425
	2,523,229	-7,500	2,515,729

PASSED AND ADOPTED at a regular meeting of the Board of Directors of Alsea School District 7J on the **13th** day of **October**, 2023 by the following vote:

AYES: _____ NAYS: _____ ABSENT: _____ ABSTAIN: _____

Risteen Follett, Chair Board of Directors

Krista Nieraeth, Superintendent

Lora Nickle, Executive Secretary

d. MOU - Alsea SD and Alsea Education Assoc.

Memorandum of Understanding

Between

Alsea School District 7J (ASD)

and

Alsea Education Association (AEA)

This Memorandum of Understanding (MOU) sets forth the terms and understanding between the Alsea School District 7J and the Alsea Education Association to fund an annual Commitment Bonus for the 2023 – 2024 school year for the following certified employees:

Any certified employee who has:

- 1) Been with the district with a cumulative certified teaching experience for five (5) – nine (9) years will receive an annual commitment bonus of \$500.
- 2) Been with the district with a cumulative certified teaching experience for ten (10) – nineteen (19) years will receive an annual commitment bonus of \$1000.
- 3) Been with the district with a cumulative certified teaching experience for twenty (20) – twenty - nine (29) years will receive an annual commitment bonus of \$1500.
- 4) Been with the district with a cumulative certified teaching experience of thirty (30) or more years will receive an annual commitment bonus of \$2000.

All bonuses will be paid in equal installments in the employee’s paycheck for the 2023 – 2024 school year.

This MOU shall become effective upon signature by the authorized officials from the ASD and the AEA and will remain in effect only for the 2023 – 24 school year.

Date: _____
(ASD Superintendent)

Date: _____
(ASD Board Chair)

Date: _____
(AEA President)

- e. Meeting Procedure - Roll Call
- 6. Old Business
- 7. First Reading *(Shaded words are new/strike-throughs are deleted)
 - a. BD/BDA - Board Meetings

OSBA Model Sample Policy

Code: BD/BDA

Adopted:

Board Meetings

{Optional policy. School boards must follow public meeting law regardless of whether the board adopts this policy. This policy reflects public meeting law as amended by House Bill 2805 (2023).}

The Board has the authority to act only when a quorum is present at a duly called regular, special or emergency meeting. “Meeting” means the convening¹ of a quorum of the Board as the district’s governing body to make a decision² or to deliberate³ toward a decision on any matter. This includes meeting for the purpose of gathering information to serve as the basis for a subsequent decision or recommendation by the Board governing body, i.e. a work session. “Meeting” does not include any on-site inspection of any project or program the attendance of members of the Board at any national, regional or state association to which the Board or its members belong.

The affirmative vote of the majority of members of the Board is required to transact any business.

All regular, special and emergency meetings of the Board will be open to the public except as provided by law. Access to and the ability to attend all meetings (excluding executive sessions) by telephone, video or other electronic or virtual means will be made available when reasonably possible. All meetings will be conducted in compliance with state and federal statutes. [For information how to give or submit public comment [it is outlined in Board policy BDDH - Public Comment at Board Meetings⁴] [and/or] [posted on the district’s website].]

All Board meetings, including Board retreats and work sessions, will be held within district boundaries, except as allowed by law⁵. The Board may attend training sessions outside the district boundaries but cannot deliberate or discuss district business. No meeting will be held at any place where discrimination

¹ “Convening” means: (a) Gathering in a physical location; (b) Using electronic, video or telephonic technology to be able to communicate contemporaneously among participants; (c) Using serial electronic written communications among participants; or (d) Using an intermediary to communicate among participants.

² “Decision” means any determination, action, vote or final disposition upon a motion, proposal, resolution, order, ordinance or measure on which a vote of a governing body is required, at any meeting at which a quorum is present.

³ “Deliberation” means discussion or communication that is part of a decision-making process.

[⁴ When telephone or other electronic means of communication is used during a meeting open to the public, the Board shall make at least one place available to the public where, or at least one electronic means by which, the public can listen during the meeting. At all meetings of the Board open to the public, the public will be provided an opportunity, to the extent reasonably possible, to access and attend the meeting by telephone, video or other electronic or virtual means. If in-person oral testimony (or public comment) is allowed, the public will be provided, to the extent reasonably possible, an opportunity to submit oral testimony during the meeting[, at the designated portion of the agenda,] by telephone, video or other electronic or other means. If in-person written testimony is allowed, the public will be provided, to the extent reasonably possible, an opportunity to submit written testimony including by email or other electronic means, so that the Board is able to consider the submitted testimony in a timely manner.]

⁵ ORS 192.630(4). Meetings of the governing body of a public body shall be held within the geographic boundaries over which the public body has jurisdiction, or at the administrative headquarters of the public body or at the other nearest practical location. Training sessions may be held outside the jurisdiction if no deliberations toward a decision are involved.

on the basis of disability, race, creed, color, sex, sexual orientation, gender identity, age or national origin is practiced.

The Board will give public notice reasonably calculated to give actual notice to interested persons, including the news media which have requested notice ~~use with disabilities~~, of the time and place for all Board meetings and of the principal subjects to be considered. The Board may consider additional subjects at a meeting, even if they ~~were~~ are not included in the notice.

If requested to do so at least 48 hours before a meeting held in public, the Board shall make a good faith effort to provide an interpreter for hearing-impaired persons. If the meeting is being held upon less than 48 hours' notice and a request for an interpreter is made, the Board shall make a reasonable effort to have an interpreter present. Other appropriate auxiliary aids and services will be provided upon request and appropriate advance notice.

~~[If requested to do so at least [72] hours before a meeting held in public, the Board will make a reasonable effort to provide translation services.]{6}]~~

All meetings held in public shall comply with the Oregon Indoor Clean Air Act.

~~[The possession of dangerous or deadly weapons and firearms, as defined in law and Board policy, is prohibited on district property.]~~

1. Regular, Special and Emergency Meetings

Generally, a regular Board meeting will be held each month. The regular meeting schedule will be established at the annual organizational meeting and may be changed by the Board with proper notice. The purpose of each regular monthly meeting will be to conduct the regular Board business.

No later than the next regular meeting following July 1, the Board will hold the annual organizational meeting to elect Board officers for the coming year and to establish the year's schedule of Board meetings. In Board election years (odd numbered years), the first meeting will be held no later than July 31.

Special meetings can be convened by the Board chair, upon request of three Board members, or by common consent of the Board at any time to discuss any topic. ~~[A special meeting may also be scheduled if less than a quorum is present at a meeting, or additional business still needs to be conducted at the ending time of a meeting, conducting business prior to the next regular meeting would be advantageous to the district or other reasons.]~~ At least 24 hours' notice must be provided to all Board members, the news media, which have requested notice, and the general public for any special meeting.

Emergency meetings can be called by the Board in the case of an actual emergency upon appropriate notice under the circumstances. The minutes of the emergency meeting must describe the emergency. Only topics necessitated by the emergency may be discussed or acted upon at the emergency meeting.

{6 Districts are encouraged to evaluate translation needs and resources prior to adding this language. A district may decide that translating the agenda, minutes or other documents, or public comment is sufficient.}

2. Communications Outside of Board Meetings

Communications, to, by and among a quorum of Board members outside of a legally called Board meeting, in their capacity as Board members, shall not be used for the purpose of discussing district business. This includes electronic, video or telephonic communications, serial electronic communications among participants and using an intermediary to communicate among participants. Such ~~Electronic~~ communications among Board members shall be limited to messages not involving deliberation, debate, decision-making or gathering of information on which to deliberate.

~~Electronic communications may contain:~~ Communications outside of a Board meeting may contain:

a. Communications to, between or among members of a governing body that are:

- (1) Purely factual or educational in nature and that convey no deliberation or decision on any matter that might reasonably come before the Board (including agendas and information concerning agenda items);
- (2) Not related to any matter that, at any time, could reasonably be foreseen to come before the Board for deliberation and decision; or
- (3) Nonsubstantive in nature, such as communication relating to scheduling, leaves of absence and other similar matters; or

~~b. Agenda item suggestions;~~

~~c. Reminders regarding meeting times, dates and places;~~

~~d. Board meeting agendas or information concerning agenda items;~~

~~e. One-way information from Board members or the superintendent to each Board member (e.g., an article on student achievement or to share a report on district progress on goals);~~

~~f.b.~~ Individual responses to questions posed by community members, subject to other limitations in Board policy.

~~[E-mails sent to other Board members will have the following notice:~~

~~*Important: Please do not reply or forward this communication if this communication constitutes a decision or deliberation toward a decision between and among a quorum of a governing body which could be considered a public meeting. Electronic communications on district business are governed by public meetings law.*~~

3. Private or Social Meetings

Private or social meetings of a quorum of the Board for the purpose of making a decision or to deliberate toward a decision on any matter are prohibited by public meetings law.

4. Work Sessions

The Board may use regular or special meetings for the purpose of conducting work sessions to provide its members with opportunities for planning and thoughtful discussion. Work sessions will be conducted in accordance with state law on public meetings, including notice and minutes. [The Board [may make] [is discouraged from making] official decisions during a work session.] [Generally, Boards do not take official action during work sessions, although there is no legal prohibition to do so.]

5. Executive Sessions

Executive sessions may be held [as an agenda item] during regular, special or emergency meetings for a reason permitted by law. [(See Board policy BDC - Executive Sessions)]

Complaints regarding public meetings laws can be filed with the Board in accordance with Board Policy KL – Public Complaints. The Board will respond and provide a copy of the complaint and response to the Oregon Government Ethics Commission within 21 days in accordance with state law.⁷

^{8}[**Mandatory Training**

Every member of the Board shall attend or view a training on public meetings law prepared or approved by the Oregon Government Ethics Commission (OGEC) at least once during the Board member’s term of office and shall verify attendance in accordance with OGEC procedures.]

END OF POLICY

Legal Reference(s):

[ORS 174.100](#)

[ORS 174.104](#)

[ORS Chapter 192](#)

[ORS Chapter 193](#)

[ORS 255.335](#)

[ORS 332.040 - 332.061](#)

[ORS 433.835 - 433.875](#)

⁷ See House Bill 2805 (2023) Section 5(2) for requirements of the response.

⁸ {This is required for Board members in districts with total expenditures for a fiscal year of \$1 million or more. This number will be reviewed by OGEC at least once every five years. If the district has total expenditures of less than \$1 million, this language can be kept, but “shall” should be replaced with “is encouraged to.”}

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2020); 28 C.F.R. Part 35 (2020).

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018).

OR. ATTY. GEN. Public Records and Meetings Manual.

[House Bill 2805 \(2023\)](#).

~~Oregon House Bill 2560 (2021)~~.

~~Oregon House Bill 3041 (2021)~~.

b. EFA - Local Wellness

OSBA Model Sample Policy

Code: EFA

Adopted:

Local Wellness

{Required. Title 7 C.F.R. 210.31(a) requires local education agencies to “establish a local school wellness policy for all schools participating in the National School Lunch Program and/or School Breakfast Program...”. The law describes the policy as “a written plan that includes” various components intended to improve student wellness. This policy is designed to meet the requirements for a wellness policy and provide the framework for the district’s plan. Previously these requirements were split between the policy and an administrative regulation (AR). All required and/or related content is now included in the model policy, therefore OSBA recommends deleting the AR if the district previously included it in the board’s policy manual. Districts should consult with stakeholders in the process of adoption and incorporate language that meets the unique needs of the district.}

The district is committed to the optimal development of every student and believes that a positive, safe and health-promoting learning environment is necessary for students to have the opportunity to achieve personal, academic, developmental and social success.

To help ensure students possess the knowledge and skills necessary to make healthy choices for a lifetime, the superintendent shall prepare and implement a comprehensive district nutrition program consistent with state and federal requirements for districts sponsoring the National School Lunch Program (NSLP) and/or the School Breakfast Program (SBP). The program shall reflect the Board’s commitment to providing adequate time for instruction that fosters healthy eating through nutrition education and promotion, serving healthy and appealing foods at district schools, developing food-use guidelines for staff and establishing liaisons with nutrition service providers, as appropriate.

~~{The district superintendent or designee shall establish a Wellness Advisory Committee to advise the district in the development, review and update of the local wellness policy.}~~

POLICY IMPLEMENTATION, MONITORING, ACCOUNTABILITY AND COMMUNITY ENGAGEMENT

Implementation

The district shall manage and coordinate the implementation of this local wellness policy.

Implementation will consist of, but not be limited to, the following:

1. Delineating roles, responsibilities, actions and timelines specific to each school;
2. Generating and disseminating information about who will be responsible to make what change, by how much, where and when;
3. Establishing standards for all foods and beverages provided (but not sold) to students during the school day on participating school campuses;
4. Establishing standards and nutrition guidelines for all foods and beverages sold to students during the school day on participating school campuses that meet state and federal nutrition standards for NSLP and SBP, permit marketing of same that meets the competitive food nutrition standards, and promotes student health and reduces child obesity; and

5. Establishing specific goals for nutrition promotion and education, physical activity, **[physical education]** and other school-based activities that promote student wellness.

The Board designates the ~~[superintendent]~~ **[principal(s)]** to be responsible for ensuring each school meets the goals outlined and complies with this policy.

~~[Record Keeping]~~

~~The district will retain the following records to document compliance with the local wellness policy requirements at the district's administrative offices:~~

- ~~1. The written local wellness policy;~~
- ~~2. Documentation to demonstrate the policy has been made available to the public;~~
- ~~3. Documentation of efforts to review and update the local wellness policy, including an indication of who participates in the update and the methods the district uses to make stakeholders aware of their ability to participate;~~
- ~~4. Documentation to demonstrate compliance with the annual public notification requirements;~~
- ~~5. Documentation of the district's most recent assessment on the implementation of the local wellness policy;~~
- ~~6. Documentation to demonstrate the most recent assessment on the implementation of the local wellness policy has been made available to the public.]~~

Notification of Policy

The district will inform the public about the content and implementation of the local wellness policy, and post the policy and any updates to the policy on the district website annually. Included will be, if available, the most recent assessment of the implementation, and a description of the progress being made in attaining the goals of the policy.

The district will publicize the name and contact information of the district or school official(s) leading and coordinating the policy and information on how the public can get involved with the local wellness policy. This information will be published on the district's website and in district communications.

Triennial Progress Assessments

At least once every three years, the district will evaluate the implementation of this policy and its progress with a triennial assessment and produce a progress report that will include:

1. The extent to which schools under the jurisdiction of the district are in compliance with the policy;
2. The extent to which the district's policy compares to model local school wellness policy^{1}; and

¹ {Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

3. A description of the progress made in attaining the goals of the district’s policy.

The district will publish the triennial progress report on the district website when available. The district will update or modify the policy based on results of the triennial assessment.

Community Involvement, Outreach and Communications (Review of, and Updating Policy) ^{2}

The district will actively communicate ways in which the community can participate in the development, implementation and periodic review and update of the local wellness policy. The district will communicate information about opportunities ~~[in community news, on the district’s website, on school websites, and/or in district or school communications]~~. The district will ensure that communications are culturally and linguistically appropriate to the community.

Parents, students, representatives of the school food authority, teachers of physical education, school health professionals, the Board, school administrators, and the general public will be solicited to participate in the periodic review and update of the local school wellness policy.

~~**Wellness Advisory Committee ^{3}**~~

~~The district supports a wellness advisory committee to assist the development, implementation, and periodic review and update of the local wellness policy. The superintendent or designee will be a member of this committee.~~

~~The district will publicize information about the wellness advisory committee [in community news, in communications to parents, and/or on websites operated by the district] to communicate to parents, students and the community at large to explain the committee’s purpose, process and an invitation to volunteer.~~

- ~~1. The wellness advisory committee membership will include, to the extent possible, but not be limited to:
 - a. Parents, caregivers and students;
 - b. Representatives of the school nutrition program (e.g., school nutrition director);
 - c. Physical education and/or health education teachers;
 - d. School health professionals (e.g., school nurses, physicians, dentists, health educators and other allied health personnel who provide school health services);
 - e. Mental health and social services staff (e.g., school counselors, psychologists, social workers, or psychiatrists);
 - f. School administrators (e.g., superintendent, assistant superintendent, principal, vice principal);
 - g. Board members;
 - h. Supplemental Nutrition Assistance Program (SNAP) education coordinators;
 - i. Healthcare professionals and/or other health related professionals (e.g., dietitians, doctors, nurses, dentists); and~~

² {USDA Local school wellness policy [resource](#); CDC [resource](#); CDC Healthy Schools [resource](#); USDA Local school wellness policy [outreach toolkit](#) and communication resource from [Alliance for a Healthier Generation](#).}

³ {A Wellness Advisory Committee is not required. If the district chooses to have a committee, the district should amend the language here to establish the membership and responsibilities of the committee. [School Wellness Committee Toolkit](#) published by the Alliance for a Healthier Generation}

j. ~~Members of the general public.~~

2. ~~The committee, appointed by the superintendent or designee, will meet to organize and vote on a committee chair and a secretary prior to or at the beginning of the school year. The chair and secretary will serve for one year minimum and may be reappointed.~~
3. ~~The wellness advisory committee will meet [four] times per year to review of the local wellness policy.~~
4. ~~The committee will facilitate the development, review and update of the wellness policy, and evaluate each participating school's compliance with the policy.~~

~~The district will create building level committees to establish school specific goals and activities that implement this policy. A school coordinator will be designated to support compliance with this policy.]~~

NUTRITION PROMOTION AND NUTRITION EDUCATION

Nutrition promotion and nutrition education positively influence lifelong eating behaviors by using evidence-based strategies and techniques and nutrition messages and by creating food environments that support healthy nutrition choices.

~~[Nutrition promotion and nutrition education shall be a sequential and integrated focus on improving students' eating behaviors, reflect evidence-based strategies and be consistent with state and local district health education standards.]~~

To promote nutrition education in the schools, the principal is responsible for ensuring the following goals are implemented:

1. ~~{⁴}[Students and staff will receive consistent nutrition messages throughout the school environment;~~
2. ~~Nutrition education is provided throughout the student's school years as part of the district's age-appropriate, comprehensive nutrition program [(which includes the benefits of healthy eating, essential nutrients, nutritional deficiencies, principles of healthy weight management, the use and misuse of dietary supplements, safe food preparation, and handling and storage related to food and eating)], and is aligned and coordinated with the Oregon Health Education Standards and school health education programs;~~
3. ~~Nutrition education will include culturally relevant, participatory activities that include social learning strategies and activities that are aligned and coordinated with the Oregon Health Education Standards and school health education programs;~~
4. ~~Teachers will receive curriculum-specific training;~~
5. ~~Parents and families are encouraged through school communications to send healthy snacks/meals and [reusable] water bottles with their student to school;~~

⁴ {The goals listed are examples; districts are required to include goals in the policy. Districts are encouraged to evaluate needs and resources and to develop specific goals. Districts are required to "review and consider evidence-based strategies and techniques" (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

6. Families and community organizations are involved, to the extent practicable, in nutrition education;
7. Nutrition education homework that students can do with their families is assigned (e.g., reading and interpreting food labels, reading nutrition related newsletters, preparing healthy recipes);
8. Materials on how to assess one's personal eating habits, set goals for improvement and achieve those goals.]

Nutrition promotion, including marketing and advertising nutritious foods and beverages to students, will be implemented consistently through a comprehensive and multi-channel approach, (e.g., in the classroom, cafeteria and at home) by staff, teachers, parents, students and the community.

To ensure adequate nutrition promotion, the following goals will be implemented:

1. {⁵} [Information about available meal programs is distributed prior to or at the beginning of the school year and at other times throughout the school year;
2. Information about availability and location of a Summer Food Service Program (SFSP) is distributed;
3. Nutrition promotion materials are sent home with students, published on the district website, and distributed at parent-teacher conferences;
4. Families are invited to attend exhibitions of student nutrition projects or health fairs;
5. Physical activity is a planned part of all school-community events.]

School Meals

[Schools within the district participate in U.S. Department of Agriculture (USDA) child nutrition program(s), administered through the Oregon Department of Education (ODE)[.] [which may include the NSLP[,] [and] [the SBP,] [Fresh Fruit & Vegetable Program (FFVP),] [After School Snack Program (ASSP),] [Special Milk Program (SMP),] [Summer Food Service Program (SFSP),] [Supper programs] [or others].] [The district also operates additional nutrition related programs and activities including Farm-to-School programs, school gardens, Breakfast in the Classroom, Mobile Breakfast carts or Grab 'n' Go Breakfast.]

The district's available meal program(s) will operate to meet meal pattern requirements and dietary specifications in accordance with the Healthy, Hunger-Free Kids Act and applicable federal laws and regulations.

The [principal(s)] will support nutrition and food services operation as addressed in Board policy EFAA – District Nutrition and Food Services and its accompanying administrative regulation EFAA-AR – Reimbursable Meals and Milk Programs.

⁵ {The goals listed are examples; districts are required to include goals in the policy. Districts are encouraged to evaluate needs and resources and to develop specific goals. Districts are required to “review and consider evidence-based strategies and techniques” (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

[Water

Free, safe, unflavored, drinking water will be available to all students throughout the school day and throughout every school campus. The district will make drinking water available where school meals are served during mealtimes.]

Competitive Foods and Beverages

The district controls the sale of all competitive foods. All foods and beverages outside the reimbursable school meal programs that are **sold** to students on the school campus during the school day will meet or exceed Smart Snacks Standards⁶.

Celebrations and Rewards/Incentives

All foods and beverages offered on the school campus [~~will meet or exceed~~] [are encouraged to meet] the nutrition standards set by the USDA and the Oregon Smart Snacks Standards. This includes, but is not limited to, celebrations, parties, and classroom snacks brought by parents. [~~Food will not be used as a reward or incentive.~~] [~~This information will be conveyed to staff and parents.~~]

[Fund Raising

Foods and beverages that meet or exceed the nutrition standards set by the USDA and the Oregon Smart Snacks Standards may be sold through fund raisers on the school campus during the school day. Such requests to conduct a fund raiser will be submitted to the [principal] for approval before starting.]

Food and Beverage Marketing in Schools

Any foods and beverages marketed or promoted to students on the school campus during the school day will meet or exceed the nutrition standards for competitive foods set by the USDA.

[~~The district (i.e., school nutrition services, athletics department, PTA, PTO) will review existing contracts, new contracts and equipment, and product purchase or replacement to reflect the applicable food and beverage marketing guidelines.~~]

PHYSICAL ACTIVITY AND PHYSICAL EDUCATION

A quality physical education program is an essential component for all students to learn about and participate in physical activity. The district will develop and assess student performance standards and program minute requirements in order to meet ODE's physical education content standards and state law.

Physical activity should be included in the school's daily education program for grades [pre-]K through 12 and include regular, instructional physical education, as well as co-curricular activities and recess.

In order to ensure students are afforded the opportunity to engage in physical education and physical activity in the school setting, the following goals are established:

⁶ Oregon Department of Education, [Oregon Smart Snacks Standards](#)

1. {⁷} [Physical education will be a course of study that focuses on students’ physical literacy and development of motor skills;
2. Staff encourages and provides support for parental involvement in their children’s physical education;
3. Physical education courses will be the environment where students learn, practice and are assessed on developmentally appropriate knowledge, skills and confidence to become physically literate;
4. Instruction, provided by adequately prepared teachers, i.e., licensed or endorsed to teach physical education, will meet the state adopted academic content standards for physical education (Oregon Revised Statute (ORS) 329.045). Teachers of physical education shall regularly participate in professional development activities annually;
5. {⁸} Every public school student in [~~pre-~~]kindergarten through grade 8 shall participate in physical education for the entire school year. Students in kindergarten through grade [~~5~~] [⁶] shall participate for a least 150 minutes during each school week, and students in grades [~~6~~] [⁷] through 8 for at least an average of ~~225~~ 150 minutes ~~per~~ during each school week, as calculated over the duration of a school year;
6. Physical activity will be integrated across curricula and throughout the school day. Movement will be made a part of all classes or courses as part of a well-rounded education;
7. Physical activity during the school day (including, but not limited to, recess, classroom physical activity breaks or physical education) will not be used as a punishment or a reward;
8. {⁹} At least 50 percent of the weekly physical education class time in grades K through 8 shall be devoted to actual physical activity;
9. ~~Physical activity is a planned part of all school community events;~~
10. ~~Materials promoting physical activity are sent home with students and published on the district website.]~~

{¹⁰} A student with a disability shall have suitably adapted physical education incorporated as part of their individualized education program (IEP) developed under ORS 343.151. A student who does not have an IEP but has chronic health problems, other disabling conditions or other special needs that preclude them

⁷ {The goals listed are examples; districts are required to include goals in the policy. Districts are encouraged to evaluate needs and resources and to develop specific goals. Districts are required to “review and consider evidence-based strategies and techniques” (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

⁸ {Districts are required to provide the specified number of physical education minutes, but are not required to include them as goals or in this policy. If the district operates K-5 elementary schools, select “5” in the first bracket and “6” in the second bracket. If the district operates K-6 elementary schools, select “6” in the first bracket and “7” in the second bracket.}

⁹ {This language is not required to be in policy, but this is a required action pursuant to ORS 329.496.}

¹⁰ {This language is not required to be in policy, but this is a required action pursuant to ORS 329.496.}

from participating in regular physical education instruction, shall have suitably adapted physical education incorporated as part of their individualized health plan, developed by the district.]

Other Activities that Promote Student Wellness

The district will integrate wellness activities throughout the entire school environment (districtwide). The district will coordinate and integrate other initiatives related to physical activity, physical education, nutrition and other wellness components so all efforts are complementary, not duplicated and work toward the same set of goals promoting student well-being, optimal development and strong educational outcomes.

The district will provide the following activities and encourage the following practices which promote local wellness:

1. ~~— [Scoliois screenings;~~
2. ~~— Safe Routes to Schools Program;~~
3. ~~— Physically active family and community engagement activities for families to learn about healthy eating or to practice being active together (e.g., skate night, fun run, dance night);~~
4. Nonfood-related fund raisers;
5. Physical activity energizers during transitions from one subject to another;
6. Intramural sports;
7. ~~— Monthly/Weekly school walks;~~
8. ~~— Assemblies which focus on wellness issues such as the importance of breakfast, healthy beverages, and how students and staff can incorporate 60 minutes of physical activity into their day;~~
9. Use of alternates to food as rewards in the classroom;
10. ~~— Creation of connections between out-of-school time (OST) programs that involve staff members from OST programs, both school and community based, in school initiatives that address healthy eating, such as school wellness teams or wellness committees;~~
11. Integration of social, emotional and mental health supports into school programs (e.g., promote a positive school climate where respect is encouraged and students can seek help from trusted adults);
12. Communication between classroom teachers and nutrition staff, so that menus and nutrition promotion can be tied into classroom learning and coursework;
13. ~~— Include wellness as a standing agenda item for school based meetings (e.g., staff meetings, site council meetings, PTO).]~~

~~Employee Wellness~~

~~The district encourages staff to pursue a healthy lifestyle that contributes to their improved health status, improved morale and a greater personal commitment to the school's overall wellness program. Many actions and conditions that affect the health of staff may also influence the health and learning of students. The physical and mental health of staff is integral to promoting and protecting the health of students and helps foster their academic success. The district's Employee Wellness Program will promote health, reduce risky behaviors of employees and identify and correct conditions in the workplace that can compromise the health of staff, reduce their levels of productivity, impede student success and contribute to escalating health-related costs such as absenteeism.~~

~~The district will collaborate with community partners to identify programs, services and/or resources to compliment and enrich employee wellness endeavors.~~

~~The district's Employee Wellness Program may include the following:~~

- ~~1. Health education and health promoting activities that focus on skill development and lifestyle behavior that change along with awareness building, information dissemination, access to facilities, and are preferably tailored to employees' needs and interests;~~
- ~~2. Safe, supportive social and physical environments including organizational expectations about healthy behavior, and implementation of policy that promotes health and safety and reduces the risk of disease;~~
- ~~3. Linkage to related programs such as employee assistance programs, emergency care and programs that help employees balance work life and family life;~~
- ~~4. Education and resources to help employees make decisions about health care; and~~
- ~~5. Nutrition and fitness educational opportunities that may include but are not limited to, the distribution of educational and informational materials, and the arrangement of presentations and workshops that focus on healthy lifestyles, health assessments, fitness activities and other appropriate nutrition and physical activity related topics.~~

~~The district encourages participation from all employees. "Employees" are not limited to instructional staff (i.e., teachers and instructional assistants), but includes all administrators and support staff.~~

~~The following groups are seen as essential for establishing, implementing and sustaining an effective employee wellness program:~~

- ~~1. School personnel who implement existing wellness programs in the district (i.e., employee wellness committee);~~

¹¹ {This language is optional and is not required by state or federal law.}

¹² {CDC resources for [school employee wellness](#) and [workplace health promotion](#)}

2. ~~District personnel who implement health programs for students (e.g., school health coordinator, school nurses, psychologist, health and physical educators, nutrition professionals, counselors and other staff); and~~
3. ~~Decision makers who have the authority to approve policy and provide administrative support essential for a school wellness program (e.g., Board members, superintendents, human resource administrators, fiscal services administrators and principals).]~~

[DEFINITIONS

1. “Competitive food” means all food and beverages other than meals reimbursed under programs authorized by the Richard B. Russell National School Lunch Act and the Child Nutrition Act available for sale to students on the school campus during the school day.
2. “Food and beverage marketing”^[13] is defined as advertising and other promotion in schools. Food and beverage marketing often includes an oral, written or graphic statement made for the purpose of promoting the sale of a food or beverage product made by the producer, manufacturer, seller or any other entity with a commercial interest in the product.
3. “Oregon Smart Snacks Standards”¹⁴ means the State’s minimum nutrition standards for competitive foods and beverages (ORS 336.423).
4. “School day” means, for the purpose of competitive food standards implementation, the period from the midnight before, to 30 minutes after the end of the official school day[, i.e., at the conclusion of afternoon student activities, such as athletic, music or drama practices, clubs, academic support and enrichment activities].
5. “School campus” means, for the purpose of competitive food standards implementation, all areas of property under the jurisdiction of the school that are accessible to students during the school day.]

END OF POLICY

Legal Reference(s):

- | | |
|-----------------------------|----------------------------------|
| ORS 327.531 | |
| ORS 327.537 | OAR 581-051-0100 |
| ORS 329.496 | OAR 581-051-0305 |
| ORS 332.107 | OAR 581-051-0306 |
| ORS 336.423 | OAR 581-051-0310 |
| | OAR 581-051-0400 |

¹³ [This term includes, but is not limited to, the following: brand names, trademarks, logos or tags, except when placed on a physically present food or beverage product or its container; displays, such as on vending machine exteriors; corporate brand, logo, name or trademark on school equipment, such as marquees, message boards, scoreboards or backboards (Note: Immediate replacement of these items is not required; however, districts will replace or update scoreboards or other durable equipment when existing contracts are up for renewal or to the extent that is financially possible over time so that items are in compliance.); corporate brand, logo, name or trademark on cups used for beverage dispensing, menu boards, coolers, trash cans and other food service equipment; as well as on posters, book covers, student assignment books or school supplies displayed, distributed, offered or sold by the district; advertisements in school publications or school mailings; free product samples, taste tests or coupons of a product, or free samples displaying advertising of a product.]

¹⁴ Oregon Department of Education, [Oregon Smart Snacks Standards](#)

Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. §1758b (2018).
National School Lunch Program, 7 C.F.R. Part 210 (2022).
School Breakfast Program, 7 C.F.R. Part 220 (2022).
[House Bill 3199](#) (2023).

c. EFAA-AR - Reimbursable Meals and Milk Programs

OSBA Model Sample Policy

Code: EFAA-AR
Adopted:

Reimbursable Meals and Milk Programs

(National School Lunch Program, School Breakfast Program, Special Milk Program and other meal programs)

The district's nutrition and food services will be operated in accordance with the following requirements:

Meal Pricing Procedures

1. The district may operate the Special Milk Program (SMP) at schools where students do not have access to program meals. Under SMP, the district will choose one of the following options:
 - a. Nonpricing (serve SMP milk at no charge to all students);
 - b. Pricing programs without a free option (charge all students for SMP milk); or
 - c. Pricing programs with a free option (distribute confidential applications for free milk and charge only those students for SMP milk who do not qualify for free milk based on the household's application or direct certification from Supplemental Nutrition Assistance Programs (SNAP)).
2. Reimbursable meals ~~[and afterschool snacks]~~ will be priced as a unit.
3. Reimbursable meals~~[,]~~ ~~[and]~~ ~~[milk]~~ ~~[afterschool snacks]~~ will be served free or at a reduced price to all children who are determined by the district to be eligible for free or reduced-price meals ~~[and free milk]~~.
4. Annually, the district will establish prices for reimbursable student meals~~[,]~~ ~~[and]~~ ~~[afterschool snacks]~~ ~~[milk]~~. The price charged to students who do not qualify for free or reduced-price meals ~~[or free milk]~~ will be established annually by the district in compliance with state and federal laws.
5. The price charged to students who qualify for reduced-price meals will be established annually by the district in compliance with state and federal laws.
6. ~~[The district will offer SMP [with the free option] [without the free option] [at no charge] to students who are not able to participate in the district's lunch or breakfast programs.]~~
7. ~~[The district will implement claiming alternative Provision 2 at the following schools under its jurisdiction: (List schools) .]~~
8. ~~[The district will implement claiming alternative Community Eligibility at the following schools under its jurisdiction: (List schools) .]~~

Application Procedures

1. Households receiving SNAP or Temporary Assistance to Needy Families (TANF) benefits as identified by Oregon Department of Education (ODE), will be automatically eligible for free meals~~[,]~~ ~~[and]~~ ~~[afterschool snacks]~~ ~~[milk]~~, for the students listed on the official document. Districts must access this document at least three times per year.

2. Students receiving support through the migrant education program, Runaway and Homeless Youth Act, McKinney-Vento Homeless Assistance Act, federal Head Start and state-funded prekindergarten programs, with income eligibility criteria identical or more stringent than federal Head Start, or are in state or court placement foster care, will be automatically eligible for free meals[,][and][afterschool snacks][milk], for the students listed on the official documents.
3. Households that submit a confidential application will be notified of their student’s eligibility for free or reduced-price meals [~~or free milk~~]. Households that are denied free or reduced-price benefits will be notified in writing using the ODE template letter distributed to the district annually.
4. On a case-by-case basis when a student is known to be eligible for free or reduced-price meal [~~or free milk~~] benefits, and the household fails to submit a confidential application, the superintendent or designee may complete an application for the student documenting how they know the household income qualifies the student for free or reduced-price meal benefits. Parents of a student approved for free or reduced-price benefits, when application is made for the student by a school official, will be notified of the decision and given the opportunity to decline benefits.
5. Students who do not qualify for free or reduced-price meals [~~or free milk~~] are eligible to participate in the [SMP,] National School Lunch Program (NSLP) [and School Breakfast Program (SBP)] and will be charged “paid” prices set by the district. “Paid” category students will be treated equally to students receiving free or reduced-price benefits in every aspect of the district’s NSLP[,][and] [SMP] [SBP] [~~Child and Adult Care Food Program (CACFP)~~][Summer Food Service Program (SFSP)].
6. The district has established a fair hearing process under which a household can appeal a decision with respect to the household’s application for benefits or any subsequent reduction or termination of benefits.
7. In the event of major employers contemplating large layoffs in the attendance area of the district, the district will provide confidential applications and eligibility criteria for free and reduced-price meals [~~or free milk~~] to the employer for distribution to affected employees.

Financial Management of the Nonprofit School Food Service

1. The district will maintain a nonprofit school nutrition and food service operation.
2. Revenues earned by the school nutrition and food services will be used only for the operation or improvement of NSLP[,][and] [SMP] [SBP] [~~CACFP~~] [SFSP].
3. Lunch and breakfast meals served to teachers, administrators, custodians and other adults not directly involved with the operation of the district’s nutrition and food services will be priced to cover all direct and indirect cost of preparing and serving the meal.¹
4. District nutrition and food services revenues will not be used to purchase land or buildings.

¹ For meals with portion sizes equivalent to student meals, the adult meal price will be no less than the amount of reimbursement for a free-eligible meal, plus the value of commodity foods used in the meal preparation.

5. The district will limit its nutrition and food services net cash resources to an amount that does not exceed three months average expenditures.
6. The district will maintain effective control and accountability for, and adequately safeguard, all nutrition and food services' cash, real and personal property, equipment and other assets, and ensure they are used solely for nutrition and food services purposes.
7. The district will meet the requirements for allowable **NSLP[,]** **[and]** **[SMP]** **[SBP]** ~~[CACFP]~~ **[SFSP]** costs as described in 2 C.F.R. 200.
8. In purchasing nutrition and food services goods or services, the district will not accept proposals or bids from any party that has developed or drafted specifications, requirements, statements of work, invitations for bids, requests for proposals, contract terms and conditions or other documents for proposals used to conduct the procurement.
9. All procurement transactions for nutrition and food services goods and services will be conducted according to state, federal and district procurement standards using the applicable cost thresholds.
10. In the operation of its nutrition and food services program, the district will purchase food products where at least 50 percent of the ingredients are produced or processed in the United States, whenever possible.
11. **[The district may use facilities, equipment and personnel supported with nutrition and food services revenue to support a nonprofit nutrition program for the elderly.]**

Civil Rights and Confidentiality Procedures

1. The district will not discriminate against any student because of their eligibility for free or reduced-price meals.
2. The district will not discriminate against any student or any nutrition and food services employee because of race, color, national origin, marital status, sex, sexual orientation, parental status, religion, age or disability.
3. The district will assure that all students and nutrition and food services employees are not subject to different treatment, disparate impact or a hostile environment.
4. Established district procedures will be followed for receiving and processing civil rights complaints related to applications for **NSLP[,]** **[and]** **[SMP]** **[SBP]** ~~[CACFP]~~ **[SFSP]** benefits and services, and employment practices with regard to the operation of its **NSLP[,]** **[and]** **[SMP]** **[SBP]** ~~[CACFP]~~ **[SFSP]**. The district will forward any civil rights complaint regarding the district's nutrition and food services to ODE's director of Child Nutrition Programs within three days of receiving the complaint.
5. The district will make written or oral translations of all nutrition and food services materials available to all households who do not read or speak English.
6. The district will maintain strict confidentiality of all information obtained through a confidential application for free and reduced-price meals [or free milk] or direct certification, including students' eligibility for free or reduced-price meals and all household information. The district's **NSLP[,]** **[and]** **[SMP]** **[SBP]** ~~[CACFP]~~ **[SFSP]** operators are not required to release any information from a

student's confidential application for free or reduced-price meals ~~for free milk~~. No information may be released from a student's eligibility information without first obtaining written permission from the student's parent or legal guardian/adult household member signing the application, except as follows:

- a. An individual student's name and eligibility status may be released without written consent only to persons who operate or administer federal education programs; persons who operate or administer state education or state health programs at the state level; persons evaluating state, education assessment; or persons who operate or administer any other NSLP, SBP, SMP, CACFP, SFSP or SNAP;
- b. Any other confidential information contained in the confidential application for free and reduced-price meals or free milk (e.g., family income, address, etc.) may be released without written consent only to persons who operate or administer the NSLP, SBP, SMP, CACFP, SFSP and the Special Supplemental Nutrition Program for Women, Infants and Children (WIC); the Comptroller General of the United States for audit purposes; and federal, state or local law enforcement officials investigating alleged violation of any of the programs listed above.

Nutrition and Menu Planning

1. Meals and afterschool snacks served for reimbursement will meet the nutrition standards established by the U.S. Department of Agriculture (USDA) and Oregon Smart Snacks Standards.
2. Meals ~~and afterschool snacks~~ served for reimbursement will meet at least the minimum NSLP[,] ~~and~~ [SBP] ~~CACFP~~ [SFSP] requirements for food items and quantities.
3. Meals served for reimbursement will:
 - a. Meet all calorie range requirements by grade level;
 - b. Meet the maximum standards set for saturated fat;
 - c. Meet the maximum standards set for sodium by grade level; and
 - d. Meet the requirement for zero grams of trans fats.
4. The district will use the offer versus serve option when serving NSLP lunches to senior high school students. High school students must take at least three of five different food items including one-half cup of fruit or vegetable offered in program lunches.
5. ~~[The district will use the offer versus serve option when serving program breakfasts to senior high school students. High school students must take at least three of four food items, including one-half cup of fruit or vegetable offered in program breakfasts.]~~
6. ~~[The district will use the offer versus serve option when serving program lunches to students below senior high school grades. Students below high school grades will be required to take three of the five food items, including one-half cup of fruit or vegetable offered in program lunches.]~~
7. ~~[The district will use the offer versus serve option when serving program breakfasts to students below senior high school grades. Students below high school grades will be required to take three of the four food items, including one-half cup of fruit offered in program breakfasts.]~~

8. A copy of the Board minutes adopting the offer versus serve policy for students below high school grades for program lunches and/or for all students in the district for program breakfasts, as applicable, will be made available upon request.

Use and Control of Commodity Foods

1. The district will accept and use commodity foods in as large a quantity as may be efficiently utilized in the ~~NSLP[,] [and] [SBP] [SFSP]~~.
2. The district will maintain necessary safeguards to prevent theft or spoilage of commodity foods.
3. The value of commodity foods used for any food production other than NSLP, SBP, SFSP or afterschool snacks shall be replaced in the food service inventory.

Accuracy of Reimbursement Claims

1. The district will claim reimbursement only for reimbursable meals~~[,] [and] [afterschool snacks]~~ ~~[milk]~~ served to eligible children.
2. All meals~~[,] [and] [afterschool snacks]~~ ~~[milk]~~ claimed for reimbursement will be counted at each dining site at a “point of service” where it can be accurately determined that the meal~~[,] [and] [afterschool snack]~~ ~~[milk]~~ meets ~~NSLP[,] [and] [SMP,] [SBP,] [CACFP]~~ ~~[and] [SFSP]~~ requirements for reimbursement.
3. The person responsible for determining if the meals [and afterschool snacks] are reimbursable will be trained to recognize a reimbursable meal.
4. The district official signing the claim for reimbursement will review and analyze monthly ~~meal[,] [and] [afterschool snack]~~ ~~[milk]~~ counts to ensure accuracy of the claim, before submitting the claim to ODE.
5. Annually, by November 15, the district will verify a random sample of applications according to NSLP verification requirements. Instructions for completing the verification process will be sent by ODE to the district in October each year.

Food Safety and Sanitation Inspections

1. The district will maintain necessary facilities for storing, preparing and serving food and milk.
2. Semiannually, the district will schedule food safety inspections with the county Environmental Health Department for each school or dining site under its jurisdiction.
3. The district will maintain health standards in compliance with all applicable state food safety regulations at each school or dining site under its jurisdiction.

General USDA NSLP/SBP/SMP Requirements

1. The district will ensure that no student is denied a meal as a disciplinary action.
2. Breakfast will be served in the morning hours, at or near the beginning of the student’s school day.

3. Lunch will be served between the hours of 10 a.m. and 2 p.m.
4. The district will provide substitute foods for students with a disability² that restricts their diet when supported by a written statement from a state-licensed health care professional, who is authorized to write medical prescriptions. Substitutions will be provided only when a medical statement from the licensed health care professional is on file at the school. The medical statement must state the nature of the child's impairment so its effect on the student's diet is understood, and what must be done to accommodate the impairment. The district will not charge more than the price of the school meal, as determined by the child's eligibility status, for meals with the accommodation.
5. The district will control the sale of competitive foods.
6. The district will ensure that potable [drinking] water will be available to students, free of charge for consumption in the place where meals are served during meal service.
7. The district will notify all households and appropriate staff of its meal charge requirements^[3] at the beginning of each school year, upon enrollment of a student or the transfer of a student. The meal charging requirements will be [posted on the district website,] [~~published in the student/parent handbook~~] [~~and made available in the information on free and reduced-priced meals~~].

[⁴][Regardless of the ability to pay, a student shall be provided a reimbursable meal upon request. Parents or guardians may provide written permission to the district to withhold a meal from a student. After five meal charges the district will attempt to certify the student for free or reduced-price meals. At least two attempts to contact the student's parent or guardian for completing a meal application will be made by the district, including offering assistance filling out the application, if appropriate. Communications regarding student charges will be directed to parents or guardians, only.] [~~The district may refer delinquent meal charges to third parties for collection. Collection fees will not be charged to the parent or guardian.~~]
8. The sale of foods in competition with the district's lunch (NSLP) or breakfast (SBP) programs will be allowed in dining sites during lunch and breakfast periods with Board approval only when all income from the food sales accrues to the benefit of the district's nutrition and food services or accrues to a school or student organization approved by the Board. A copy of the Board minutes approving and defining competitive food sales will be made available upon request.
9. Students [~~will~~] [will not] be charged for second servings of meals or portions of meals served.

² To comply with Section 504 as it relates to a student's severe food allergy, such as milk, gluten, nut or soy, and including but not limited to diabetes, colitis, etc.

³ [Federal law requires the district to publish meal charging requirements. The district's charging requirements must identify how and when the information about account balances is communicated to staff, students and parents, and what collection methods will be used on delinquent balances.]

⁴ [Pursuant to ORS 327.535 the following language reflects required practice, but the language is not required to be in policy.]

Record Keeping

The following documents will be maintained by the district for three years after the current school year or longer, in the event of an unresolved audit(s), until the audit(s) has been completed:

1. All currently approved and denied confidential applications for free and reduced-price meals~~[, free milk,]~~ all current direct certification documents, eligibility verification documents and school membership or enrollment lists;
2. Financial records that account for all revenues and expenditures of the district's nonprofit nutrition and food services programs, including procurement documents;
3. Records (i.e., recipes, ingredient lists and nutrition fact labels or product specifications) that document the compliance with nutrition standards for all program and competitive foods available for sale to students at a school campus;
4. Documents of participation data (i.e. meal counts) from each school in the district to support claims for reimbursement;
5. Production and menu records;
6. Records to document compliance with Paid Lunch Equity;
7. Records to document compliance with Revenue from Nonprogram Foods; and
8. Internal program monitoring documents for **NSLP**[,] **[and] [SBP,]** ~~[afterschool snacks]~~ **[CACFP]** **[SFSP]**.

d. GCBDA/GDBDA - Family Medical Leave (version 2)

OSBA Model Sample Policy

Code: GCBDA/GDBDA
Adopted:

Family Medical Leave * (Version 2)

{Highly recommended policy. The law does not require districts to have a board-adopted policy, but the district is required to follow the law. Having policy and an administrative regulation in place can assist with compliance. This policy is intended for districts with between 25 and 50 employees. If the district does not have 25 employees, the district should not adopt this policy.}

When applicable, the district will comply with the provisions of the Family and Medical Leave Act (FMLA)^{1}, the Oregon Family Leave Act (OFLA)^{2}, the Oregon Military Family Leave Act (OMFLA), Paid Family Medical Leave Insurance (PFMLI) and other applicable provisions of state and federal law, Board policies and collective bargaining agreements regarding family medical leave.

In order for an employee to be eligible for the benefits under FMLA, the employee must have been employed by the district for at least 12 months, have worked at least 1,250 hours during the past 12-month period and worked at a worksite that employs 50 district employees within 75 miles of the worksite.³

Generally, in order for an employee to be eligible for the benefits under OFLA, the employee must work an average of 25 hours or more per week during the 180 calendar days immediately prior to the first day of the start of the requested leave. For parental leave purposes, an employee becomes eligible upon completing at least 180 calendar days immediately preceding the date on which the parental leave begins: there is no minimum average number of hours worked per week. Special requirements apply during public health emergencies.

OMFLA applies to employees who work an average of at least 20 hours per week; there is no minimum number of days worked when determining an employee's eligibility for OMFLA.

PMFLI is generally available to district employees who have earned \$1,000 in subject wages or taxable income during the alternate or base years⁴, contributed to the PMFLI fund in the alternate or base years and are otherwise eligible.⁵

Federal and state leave entitlements generally run concurrently.

¹ Generally, FMLA applies only to entities with 50 or more employees, however, FMLA applies to all public elementary and secondary educational institutions. See 29 CFR 825.600(b). The rule regarding individual employee eligibility does apply: an employee is only eligible if the employee "is employed at a worksite where 50 or more employees are employed by the employer within 75 miles of that worksite." See 29 CFR 825.110(a)(3). Consequently, FMLA applies to districts with fewer than 50 employees, but individual employees will not be eligible to receive benefits.}

² OFLA applies to employers with 25 or more employees in Oregon (ORS 659A.153) and OMFLA applies to all public-sector employers in Oregon. (ORS 659A.090(2)) (Oregon BOLI Leave Laws – 2023 Edition)}

³ While the district is subject to FMLA, the district does not have any eligible employees. Consequently, FMLA eligibility language has been omitted from this policy and the accompanying AR.

⁴ The wages are not required to have been earned for work in the district.

⁵ See OAR 471-070-1010 for additional information.

The superintendent [or designee] will develop administrative regulations as necessary for the implementation of the provisions of both federal and state law.

END OF POLICY

Legal Reference(s):

[ORS 332.507](#)
[ORS 659A.090](#)
[ORS 659A.093](#)

[ORS 659A.096](#)
[ORS 659A.099](#)
[ORS 659A.150 - 659A.186](#)

[ORS 659B.010](#)
[OAR 839-009-0200 - 0320](#)

Americans with Disabilities Act, 42 U.S.C. §§ 12101-12213; 29 C.F.R. Part 1630 (2017); 28 C.F.R. Part 35 (2017).
Family and Medical Leave Act, 29 U.S.C. §§ 2601-2654; 5 U.S.C. §§ 6381-6387 (2012); Family and Medical Leave Act, 29 C.F.R. Part 825 (2017).
Americans with Disabilities Act, 42 U.S.C. §§ 12101-12133 (2018); 29 C.F.R. Part 1630 (2019); 28 C.F.R. Part 35 (2019).
Escriba v. Foster Poultry Farms, Inc., 743 F.3d 1236 (9th Cir. 2014).
Senate Bill 999 (2023).

e. GCBDA/GDBDA-AR - Family Leave (version 2)

OSBA Model Sample Policy

Code: GCBDA/GDBDA-AR
Revised/Reviewed:

Family Leave * (Version 2)

{Highly recommended administrative regulation (AR). The law does not require districts to have this information in an AR, but the district is required to follow the law. Having an AR in place can assist with compliance. This AR is intended for districts with between 25 and 50 employees. If the district does not have 25 employees, the district should not use this AR.}

Employee Eligibility

FMLA benefits are available to employees who have been employed by the district for at least 12 months, have worked at least 1,250 hours during the past 12-month period and work at a worksite that employs 50 district employees within 75 miles of the worksite.¹

Generally, in order for an employee to be eligible for the benefits under OFLA, the employee must work an average of 25 hours or more per week during the 180 calendar days immediately prior to the first day of the start of the requested leave.² For parental leave purposes, an employee becomes eligible upon completing at least 180 days immediately preceding the date on which the parental leave begins: there is no minimum average number of hours worked per week.

An employee is eligible to take leave for purposes of OFLA during a period of time covered by a public health emergency except:

1. An employee who has worked for the district for fewer than 30 days immediately before the date on which the family leave would commence; or
2. An employee who has worked for the district for an average of fewer than 25 hours per week in the 30 days immediately before the date on which the family leave would commence.

An employee of the district is eligible to take leave for purposes of OFLA if the employee:

1. Separates from employment with the district, irrespective of any reason:
 - a. Is eligible to take leave OFLA at the time the employee separates; and
 - b. Is reemployed by the district within 180 days of separation from employment; or
2. Is eligible to take OFLA leave:
 - a. At the beginning of a temporary cessation of scheduled hours of 180 days or less; and

¹ While the district is subject to FMLA, the district does not have any eligible employees. Consequently, most FMLA eligibility language has been omitted from this AR.

² The requirements of OFLA do not apply to any employer offering eligible employees a nondiscriminatory cafeteria plan, as defined by section 125 of the Internal Revenue Code of 1986, which provides as one of its options employee leave at least as generous as the leave required by OFLA.

- b. Returns to work at the end of the temporary cessation of scheduled hours of 180 days or less.

Any OFLA leave taken by the employee within any one-year period continues to count against the length of time of OFLA leave the employee is entitled. The amount of time that an employee is deemed to have worked for the district prior to a break in service due to a separation from employment or a temporary cessation of scheduled hours shall be restored to the employee when the employee is reemployed by the district within 180 days of separation from employment or when the employee returns to work at the end of the temporary cessation of scheduled hours of 180 days or less.

An employee who has previously qualified for and has taken some portion of OFLA leave, may request additional OFLA leave within the same leave year. In such instances, the employee must requalify as an eligible employee for each additional leave requested unless one of the following exceptions apply:

1. An employee taking, in any order, some or all of 12 weeks of OFLA pregnancy disability leave and some or all of 12 weeks of OFLA leave for any other purpose, need not requalify leave in the same leave year;
2. An employee who has taken 12 weeks of parental leave need not requalify to take an additional 12 weeks in the same leave year for sick child leave;
3. An employee granted leave for a serious health condition for the employee or a family member need not requalify if additional leave is taken in this leave year for the same reason;
4. An employee unable to work because of a disabling compensable injury³ need not requalify in order to use OFLA leave following a period the employee is off work due to the compensable injury; and
5. An employee who has taken serious health condition leave to care for a family member who dies during the employee's serious health condition need not requalify to take leave for the death of that family member.

OMFLA applies to employees who work an average of at least 20 hours per week. There is no minimum number of days worked when determining employee eligibility for OMFLA.

In determining if an employee has been employed for the preceding 180 calendar days, the district must consider days, paid or unpaid, an employee is maintained on payroll. Full-time public school teachers who have been maintained on payroll by the district for 180 consecutive calendar days are thereafter deemed to have been employed for an average of at least 25 hours per week during the 180 days immediately preceding the start date of the OFLA leave.

In determining average workweek, the employer must count the actual hours worked using the Fair Labor Standards Act (FLSA) guidelines.

Qualifying Reason

Eligible employees may access OFLA for the following reasons:

³ As defined in ORS 656.005.

1. Serious health condition of the employee or the employee’s covered family member. Serious health condition means:
 - a. An illness, injury, impairment or physical or mental condition that requires inpatient care in a hospital, hospice or residential medical care facility;
 - b. An illness, disease or condition that in the medical judgement of the treating health care provider poses an imminent danger of death, is terminal in prognosis with a reasonable possibility of death in the near future, or requires constant care;
 - c. Any period of disability due to pregnancy, or period of absence for prenatal care; or
 - d. Any period of absence for the donation of a body part, organ or tissue, including preoperative or diagnostic services, surgery, post-operative treatment and recovery.⁴
2. Parental leave (separate from eligible leave as a result of the child’s serious health condition):
 - a. Bonding with and the care for the employee’s newborn (within 12 months following birth);
 - b. Bonding with and the care for a newly adopted child or newly placed child in foster care under the age of 18 (within 12 months of placement);
 - c. Care for a newly adopted child or newly placed child in foster care over 18 years of age who is incapable of self-care because of a physical or mental impairment (within 12 months of placement);
 - d. Time to effectuate the legal process required for placement of a child in foster care or the adoption of a child.
3. Sick Child Leave: leave for non-serious health conditions of the employee’s child. For OFLA, sick child leave includes absence to care for an employee’s child whose school or child care provider has been closed⁵ in conjunction with a statewide public health emergency declared by a public health official.⁶
4. Bereavement Leave: leave related to the death of a covered family member.⁷
5. Eligible employees may access OMFLA for the purpose of spending time with a spouse or domestic partner who is in the military and has been notified of an impending call or order to active duty, or who has been deployed during a period of military conflict.

⁴ This definition is from ORS 659A.150(7). A more detailed definition is available in OAR 839-009-0210(22).

⁵ “Closure” for the purpose of sick child leave during a statewide public health emergency declared by a public health official means a closure that is ongoing, intermittent, or recurring and restricts physical access to the child’s school or child care provider. OAR 839-009-0210(4).

⁶ The district may request verification of the need for sick child leave due to a closure during a statewide emergency. Verification may include:

1. The name of the child being cared for;
2. The name of the school or child care provider that has closed or become unavailable;
3. A statement from the employee that no other family member of the child is willing and able to care for the child; and
4. With the care of a child older than 14, a statement that special circumstances exist requiring the employee to provide care to the child during daylight hours.

⁷ Bereavement leave under OFLA must be completed within 60 days of when the employee received notice of the death.

6. The eligibility of an employee who takes multiple leaves for different qualified reasons during the same leave year may be reconfirmed at the start of each qualified leave requested.

Definitions

1. Family member:
 - a. For the purposes of OFLA, “family member” means:
 - (1) Spouse or domestic partner;
 - (2) Child or the child’s spouse or domestic partner;
 - (3) Parent or the parent’s spouse or domestic partner;
 - (4) Sibling or stepsibling, or the sibling’s or stepsibling’s spouse or domestic partner;
 - (5) Grandparent or the grandparent’s spouse or domestic partner;
 - (6) Grandchild or the grandchild’s spouse or domestic partner; or
 - (7) Any individual related by blood or affinity whose close association with a covered individual is the equivalent of a family relationship.⁸
2. Child:
 - a. For the purposes of OFLA, “child” means a biological or adopted child, a child in foster care or stepchild of the employee, the child of the employee’s domestic partner, or a child with whom the employee is or was in a relationship of “in loco parentis”.
 - b. For the purposes of parental and sick child leave under OFLA, the child must be under the age of 18 or an adult dependent child substantially limited by a physical or mental impairment.
3. In loco parentis:
 - a. For the purposes of OFLA, “in loco parentis” means person in the place of the parent, having financial or day-to-day responsibility for the care of a child. A legal or biological relationship is not required.
4. Public health emergency:

⁸ “Affinity” means a relationship for which there is a significant personal bond that, when examined under the totality of the circumstances, is like a family relationship. This bond may be demonstrated by, but is not limited to the following factors, with no single factor being determinative:

- a. Shared personal financial responsibility, including shared leases, common ownership of real or personal property, joint liability for bills or beneficiary designations;
- b. Emergency contact designation of the employee by the other individual in the relationship or the emergency contact designation of the other individual in the relationship by the employee;
- c. The expectation to provide care because of the relationship or the prior provision of care;
- d. Cohabitation and its duration and purpose;
- e. Geographic proximity; and
- f. Any other factor that demonstrates the existence of a family-like relationship.

For OFLA a public health emergency means;

- a. A public health emergency declared under ORS 433.441.
- b. An emergency declared under ORS 401.165 if related to a public health emergency as defined in ORS 433.442.

Leave Period

For the purposes of calculating an employee's leave period, the district will use ~~[the calendar year] [any fixed 12-month "leave year"] [the 12-month period measured forward from the date the employee's leave begins] [a "rolling" 12-month period measured backward from the date the employee uses any family and medical leave]~~ **[a period of 52 consecutive weeks beginning on the Sunday immediately preceding the date on which family leave commences]**^{9}. The same method for calculating the one-year period for OFLA leave entitlement shall be used for all employees. However, in all instances, the leave period for the purposes of shall be dependent on the start of any such leave regardless of the district's designated leave period described above.

Leave Duration

For the purposes of OFLA, an eligible employee is generally entitled to a total of 12 weeks of qualified leave during the designated leave period. However, an employee may be entitled to an additional, full 12 weeks of parental leave during the designated leave period following the birth of a child regardless of how much OFLA qualified leave the employee has taken prior to the birth of such child during the designated leave period. Likewise, an employee who uses the full 12 weeks of parental leave during the designated leave period, will be entitled to an additional 12 weeks of sick child leave under OFLA.¹⁰ OFLA does not combine the leave entitlement for spouses working for the district. Under OFLA, family members who work for the district may be restricted from taking concurrent OFLA qualified leave.¹¹

For the purposes of OMFLA, an eligible employee is entitled to 14 days of leave per call or order to active duty or notification of a leave from deployment. When an employee also meets the eligibility requirements of OFLA, the duration of the OMFLA leave counts toward that employee's leave entitlement during the designated leave period.

For the purpose of tracking the number of leave hours an eligible employee is entitled and/or has used during each week of the employee's leave, leave entitlement is calculated by multiplying the number of hours the eligible employee normally works per week by 12¹². If an employee's schedule varies from

^{9} Beginning July 1, 2024, districts are required to use the final bracketed option for OFLA purposes. See SB 999 (2023). Prior to making a change to the leave period calculation, 60 days' notice must be provided to employees.}

¹⁰ Sick child leave under OFLA need not be provided if another family member, including a noncustodial biological parent, is willing and able to care for the child.

¹¹ Exceptions to the ability to require family members from taking OFLA qualified leave at different times are when 1) employee is caring for the other employee who has a serious medical condition; 2) one employee is caring for a child with a serious medical condition when the other employee is suffering a serious medical condition; 3) each family member is suffering a serious medical condition; 4) each family member wants to take Bereavement Leave under OFLA; and 5) the employer allows the family members to take concurrent leave.

¹² For example, an employee normally employed to work 30 hours per week is entitled to 12 times 30 hours, or a total of 360 hours of leave.

week-to-week, a weekly average of the hours worked over the 12 months worked prior to the beginning of the leave period shall be used for calculating the employee's normal workweek¹³. If an employee takes intermittent or reduced work schedule leave, only the actual number of hours of leave taken may be counted toward the 12 weeks of leave to which the employee is entitled.

Intermittent Leave

With the exception of parental leave which must be taken in one continuous block of time, an eligible employee is permitted under OFLA to take intermittent leave for any qualifying reason.

Intermittent leave is taken in multiple blocks of time (i.e., hours, days, weeks, etc.) rather than in one continuous block of time and/or requiring an altered or reduced work schedule. For OFLA this includes but is not limited to sick child leave taken requiring an altered or reduced work schedule because the intermittent or recurring closure of a child's school or child care provider due to a statewide public health emergency declared by a public health official.

When an exempt employee is eligible for OFLA but not FMLA leave, and the employee takes intermittent leave in blocks of less than one day, the district will jeopardize the employee's exempt status if the district reduces the employee's salary for the party-day absence.

An employee's intermittent leave time is determined by calculating the difference between the employee's normal work schedule and the number of hours the employee actually works during the leave period. The result of such calculation is credited against the eligible employee's leave entitlement.

Holidays or days in which the district is not in operation, are not counted against the eligible employee's intermittent OFLA leave period unless the employee was scheduled and expected to work on any such day.

Alternate Work Assignment

The district may transfer an employee recovering from a serious health condition to an alternate position which accommodates the serious health condition provided:

1. The employee accepts the position voluntarily and without coercion;
2. The transfer is temporary, lasts no longer than necessary and has equivalent pay and benefits;
3. The transfer is compliant with any applicable collective bargaining agreement;
4. The transfer is compliant with state and federal law, including but not limited to the applicable protections provided for in OFLA; and
5. The transfer is not used to discourage the employee from taking OFLA leave for a serious health condition or to create a hardship for the employee.

¹³ For example, an employee working an average of 25 hours per week is entitled to 12 times 25 hours, or a total of 300 hours of leave.

The district may transfer an eligible employee who is on intermittent OFLA leave to another position with the same or different duties to accommodate the leave, provided:

1. The employee accepts the transfer position voluntarily and without coercion;
2. The transfer is temporary, lasts no longer than necessary to accommodate the leave and has equivalent pay and benefits;
3. The transfer is compliant with any applicable collective bargaining agreements;
4. The transfer is compliant with state and federal law, including but not limited to the applicable protections provided for in OFLA;
5. The transfer to an alternate position is used only when there is no other reasonable option available that would allow the employee to use intermittent leave or reduced work schedule; and
6. The transfer is not used to discourage the employee from taking intermittent or reduced work schedule leave, or to create a hardship for the employee.

If an eligible employee is transferred to an alternative position to accommodate the employee's serious health condition, and as a result the employee works fewer hours than the employee was working in the original position, the employee's OFLA leave time is determined by calculating the difference between the employee's normal work schedule and the number of hours the employee actually works during the leave period.

When an employee is transferred to alternate position as described above but such transfer does not result in a reduced schedule, time worked in any such alternate position shall not be considered for the purpose of OFLA leave. An employee working in an alternate position retains the right to return to the employee's original position unless all OFLA leave taken in that leave year plus the period of time worked in the alternate position exceeds 12 weeks.

Special Rules for School Employees

For the purposes of OFLA, "school employee" means employees employed principally as instructors in public kindergartens, elementary schools, secondary schools or education service districts.

OFLA leave that is taken for a period that ends with the school year and begins with the next semester is considered consecutive rather than intermittent. In any such situation, the eligible school employee will receive any benefits during the break period that employees would normally receive if they had been working at the end of the school year.

1. Foreseeable Intermittent Leave Exceeding 20 Percent of Working Days

When the qualified leave is foreseeable, will encompass more than 20 percent of the eligible school employee's regular work schedule during the leave period, and the purpose of such leave is to care for a family member with a serious medical condition, for a servicemember with a serious medical condition or because of the employee's own serious medical condition, the district may require the eligible school employee to:

- a. Take leave for a period or periods of a particular duration, not greater than the duration of the planned treatment; or
- b. Temporarily transfer the eligible school employee to an alternate position for which the employee is qualified, which has equivalent pay and benefits and which better accommodates recurring periods of leave than the employee's original position.

2. Limitation on Leave Near the End of the School Year

When an eligible school employee requests leave near the end of the school year, the district may require the following:

- a. When the qualified leave begins more than five weeks before the end of the school year:
 - (1) For the purposes of OFLA leave, if the reason for the leave is because of the eligible school employee's own serious health condition, the eligible school employee may be required to remain on leave until the end of the school year, provided:
 - (a) The leave will last at least three weeks; and
 - (b) The employee's return to work would occur within three weeks of the end of the school year.
 - b. For the purposes of OFLA leave, when the qualified leave begins within five weeks of the end of the school year and the purpose of such leave is parental leave, for the serious health condition of a family member or for the serious health condition of a servicemember, the eligible school employee may be required to remain on leave until the end of the school year provided:
 - (1) The leave will last more than two weeks; and
 - (2) The employee would return to work during the two-week period before the end of the school year.
 - c. For the purposes of OFLA leave, when the qualified leave begins within three weeks of the end of the school year and the purpose of such leave is parental leave, for the serious health condition of a family member or for the serious health condition of a servicemember, the eligible school employee may be required to remain on leave until the end of the school year provided the length of the leave will last more than five working days.

If the district requires an eligible school employee to remain on leave until the end of the school year as described above, additional leave required by the employer until the end of the school year shall not count against the eligible school employee's leave entitlement.

Paid/Unpaid Leave

OFLA does not require the district to pay an eligible employee who is on a qualified leave. Paid Family Medical Leave Insurance (PMFLI) leave taken via Paid Leave Oregon or an equivalent plan will run concurrently with OFLA when taken for the same purpose. Subject to any related provisions in any applicable collective bargaining agreement [an employee may elect to use any available accrued paid leave

including personal and sick leave, or available accrued vacation leave during the leave period.]}¹⁴ This includes when an employee is being paid through PMFLI. The district will notify the eligible employee that the requested leave has been designated as OFLA leave and ask the employee about the use of available accrued paid leave.

Eligible employees who request OMFLA leave shall not be required to use any available accrued paid time off during the OMFLA leave period.

Benefits and Insurance

When an eligible employee returns to work following a OFLA qualified leave, the employee must be reinstated to the same position the employee held when the leave commenced, or to an equivalent position with equivalent benefits, pay and other terms and conditions of employment.

During an OFLA qualified leave an eligible employee does not accrue seniority or other benefits that would have accrued while the employee was working, unless the terms of a collective bargaining agreement, other agreement or other district policy provide otherwise.¹⁵ The eligible employee is also subject to layoff to the same extent similarly situated employees not taking OFLA leave are subject unless the terms of an applicable collective bargaining agreement, other agreement or the district's policies provide otherwise.

For the purposes of OFLA, the district will continue to pay the employer portion of the eligible employee's group health insurance contribution (if applicable) during the qualified leave period. The eligible employee is required to pay the employee portion of any such group health insurance contribution as a condition of continued coverage.

For the purposes of OMFLA, the eligible employee is entitled to a continuation of benefits.

Fitness-for-Duty Certification

Prior to the reinstatement of an employee following a leave which was the result of the employee's own serious health condition, the district may require the employee to obtain and present a Fitness-for-Duty Certification. If the district is going to require a fitness-for-duty certification upon return to work, the district must notify the employee of such requirement when the leave is designated as OFLA leave. Failure to provide the certification may result in a delay or denial of reinstatement.

For the purposes of OFLA qualified leave, any out-of-pocket costs associated with obtaining the fitness-for-duty certification shall be borne by the district.

Application

Under state law, an eligible employee requesting OFLA leave shall provide at least 30 days' notice prior to the leave date if the leave is foreseeable. The notice shall be written and include the anticipated start date, duration and reasons for the requested leave. When appropriate, the eligible employee must make a

¹⁴ {Coordinate with any language regarding use of accrued leave during PMFLI from GDBDF/GDBDF or any equivalent plan information.}

¹⁵ See also ORS 342.934(4)(d) in reduction force situations.

reasonable effort to schedule treatment, including intermittent leave and reduced leave, so as not to unduly disrupt the operation of the district.

The district may request additional information to determine that the requested leave qualifies as OFLA leave. The district may designate the employee as provisionally on OFLA leave until sufficient information is received to properly make a determination. An eligible employee able to give advance notice of the need to take OFLA leave must follow the district's known, reasonable and customary procedures for requesting any kind of leave.

For the purposes of OFLA, an eligible employee is required to provide oral or written notice within 24 hours of commencement of the leave in unanticipated or emergency leave situations. The employee may designate a family member or friend to notify the district during that period of time. Failure of an employee to provide the required notice for leave covered by OFLA may result in the district deducting up to three weeks from the employee's unused OFLA leave in that one-year leave period. The employee may be subject to disciplinary action for not following the district's notice procedures.

In all cases, proper documentation must be submitted no later than three working days following the employee's return to work.

Medical Certification

The district may require an eligible employee to provide medical documentation, when appropriate¹⁶, to support the stated reason for such leave. The district will provide written notification to an employee of this requirement within five working days of the employee's request for leave. If the employee provides less than 30 days' notice, the employee is required to submit such medical certification no later than 15 calendar days after receipt of the district's notification that medical certification is required.

Any additional certifications, including second and third opinions, will be in accordance with applicable law.

Posted Notice

The district will post the Bureau of Labor and Industries Family Leave notice in each building or worksite that is accessible to and regularly frequented by employees.¹⁷ The district will also post a notice explaining the provisions of FMLA and providing information concerning the procedures for filing complaints.¹⁸

Record Keeping

The district will maintain all records as required by federal and state laws including dates leave is taken by employees, identified separately from other leave; hours/days of leave; copies of general and specific

¹⁶ Medical documentation is not allowed in every situation. Review current laws and guidance for more information.

¹⁷ https://www.oregon.gov/boli/employers/Documents/BOLI_Printable_FamilyMedLv.pdf; electronic posting is not sufficient to satisfy this requirement, but may be used to supplement the physical posting.

¹⁸ <https://www.dol.gov/sites/dolgov/files/WHD/legacy/files/fmlaen.pdf>; electronic posting is sufficient as long as it is posted prominently where it can be readily seen by employees and applicants for employees. The poster and the text must be large enough to be easily read and contain fully legible text.

notices to employees, including Board policy(ies) and regulations; premium payments of employee health benefits while on leave and records of any disputes with employees regarding granting of leave.

PMedical documentation will be maintained separately from personnel files as confidential medical records.

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f. GCBDF/GDBDF - Paid Family Medical Leave Insurance (version 1)

OSBA Model Sample Policy

Code: GCBDF/GDBDF
Adopted:

Paid Family Medical Leave Insurance * (Version 1)

{Highly recommended policy. This version is designed for districts who are participating in Paid Leave Oregon (PLO). If the district is using an approved equivalent plan, the district should not adopt this version or use the accompanying administrative regulation: this includes simply replacing “the Department” with the entity administering your equivalent plan. If the district is using an equivalent plan, the district should work with the provider to communicate with staff. Contributions for PLO began on January 1, 2023 with benefits available starting September 3, 2023. Many districts are bargaining aspects of this leave: policy language should not conflict with language in collective bargaining agreements.}

The district participates in Paid Family and Medical Leave Insurance (PFMLI) and Paid Leave Oregon (PLO)¹. This includes submitting employee and employer contributions to the Employment Department (“Department”) as required by state law.² The district does not administer PFMLI or PLO. All applications and related questions should be directed to the Department.

Definitions

1. “Family leave” means leave from work taken by a covered individual:
 - a. To care for and bond with a child during the first year after the child’s birth or during the first year after the placement of the child through foster care or adoption; or
 - b. To care for a family member with a serious health condition.
2. “Family leave” does not mean:
 - a. Leave described in Oregon Revised Statute (ORS) 659A.159 (1)(d) (non-serious health condition of child or school or child care provider closure due to public health emergency);
 - b. Leave described in ORS 659A.159 (1)(e) (death of a family member); or
 - c. Leave authorized under ORS 659A.093 (leave for spouses of members of the military upon deployment or call to active duty).
3. “Family member” means:
 - a. The spouse of a covered individual;
 - b. A child of a covered individual or the child’s spouse or domestic partner;
 - c. A parent of a covered individual or the parent’s spouse or domestic partner;
 - d. A sibling or stepsibling of a covered individual or the sibling’s or stepsibling’s spouse or domestic partner;

¹ Paid Leave Oregon is the program developed by the Oregon Department of Employment to administer Paid Family and Medical Leave Insurance.

² The overall contribution will be determined by the Department director, and is initially set at 1 percent (up to \$132,900). *{For districts with 25 or more employees:} The employer contribution is 40 percent and the employee contribution is 60 percent of this amount.* *{For districts with fewer than 25 employees:} The employee contribution is 60 percent of this amount and the employer contribution is waived.* The amount will be set annually by November 15. See ORS 657B.150. *{Districts may agree to pay the employee contribution, see any applicable employment agreements.}*

- e. A grandparent of a covered individual or the grandparent’s spouse or domestic partner;
 - f. A grandchild of a covered individual or the grandchild’s spouse or domestic partner;
 - g. The domestic partner of a covered individual; or
 - h. Any individual related by blood or affinity whose close association with a covered individual is the equivalent of a family relationship.
4. “Medical leave” means leave from work taken by a covered individual that is made necessary by the individual’s own serious health condition.
5. “Safe leave” means **leave** related to domestic violence, harassment, sexual assault, stalking and relocation for health and safety reasons as provided in ORS 659A.272.
6. “Serious health condition” means an illness, injury, impairment, or physical or mental condition of a claimant or their family member that:
- a. Requires inpatient care in a medical care facility such as, but not limited to, a hospital, hospice, or residential facility such as, but not limited to, a nursing home or inpatient substance abuse treatment center;
 - b. In the medical judgment of the treating health care provider poses an imminent danger of death, or that is terminal in prognosis with a reasonable possibility of death in the near future;
 - c. Requires constant or continuing care, including home care administered by a health care professional;
 - d. Involves a period of incapacity. “Incapacity” is the inability to perform at least one essential job function, or to attend school or perform regular daily activities for more than three consecutive calendar days. A period of incapacity includes any subsequent required treatment or recovery period relating to the same condition. The incapacity must involve one of the following:
 - (1) Two or more treatments by a health care provider; or
 - (2) One treatment plus a regimen of continuing care.
 - e. Results in a period of incapacity or treatment for a chronic serious health condition that requires periodic visits for treatment by a health care provider, continues over an extended period of time, and may cause episodic rather than a continuing period of incapacity, such as, but not limited to, asthma, diabetes, or epilepsy;
 - f. Involves permanent or long-term incapacity due to a condition for which treatment may not be effective, such as, but not limited to, Alzheimer’s Disease, a severe stroke, or terminal stages of a disease. The employee or family member must be under the continuing care of a health care provider, but need not be receiving active treatment;
 - g. Involves multiple treatments for restorative surgery or for a condition such as, but not limited to, chemotherapy for cancer, physical therapy for arthritis, or dialysis for kidney disease that if not treated would likely result in incapacity of more than three calendar days;
 - h. Involves any period of disability due to pregnancy, childbirth, miscarriage or stillbirth, or period of absence for prenatal care; or
 - i. Involves any period of absence from work for the donation of a body part, organ, or tissue, including preoperative or diagnostic services, surgery, post-operative treatment, and recovery.

Eligibility

1. To be eligible for PLO benefits, an individual must:

- a. Be an employee of the district³;
- b. Earn at least \$1,000 in the base or alternate base year⁴;
- c. Contribute to the PLO in accordance with state law;
- d. Experience an event qualifying the employee for:
 - (1) Family leave;
 - (2) Medical leave; or
 - (3) Safe leave.
- e. Submit an application to Department;
- f. Have not exceeded maximum paid leave for the year; and
- g. Have no current disqualifications⁵.

Leave

PLO can be used for family leave, medical leave or safe leave. Up to 12 weeks of paid leave can be taken per benefit year.⁶ Leave can be taken in one-day increments and can be consecutive or nonconsecutive.

Any family leave or medical leave taken under PLO must be taken concurrently with any leave taken by an eligible employee under ORS 659A.150 - 659A.186 (OFLA) or under the federal Family and Medical Leave Act of 1993 (P.L. 103-3, FMLA) for the same purposes.

The district will maintain an employee's existing health benefits while the employee is using leave. The employee will be required to pay the employee's contribution to premiums.

END OF POLICY

Legal Reference(s):

[ORS 657B](#)
[OAR 471-070](#)

³ PFMLI is a state-wide benefit, and not unique to the district. An eligible individual does not need to be an employee of the district in order to be eligible for PFMLI, but this policy only applies to employees of the district.

⁴ Pay could come from another Oregon employer.

⁵ Disqualifications may include eligibility for Workers' Compensation or Unemployment or determination of a willful false statement or failure to report a material fact in order to obtain benefits. See OAR 471-070-1010(1)(h).

⁶ In some pregnancy-related situations, employees may be able to take two additional weeks, for a total for 14 weeks.

[HB 912 \(2023\)](#)
[SB 913 \(2023\)](#)
[HB 999 \(2023\)](#)

g. GCBDF/GDBDF-AR - Paid Family Medical Leave Insurance (version 1)

OSBA Model Sample Policy

Code: GCBDF/GDBDF-AR
Revised/Reviewed:

Paid Family Medical Leave Insurance (PFMLI)

{Highly recommended administrative regulation (AR). This AR is for use only with Version 1 of policy GCBDF/GDBDF - Paid Family Medical Leave Insurance * and is not intended to be used with an equivalent plan. OSBA does not recommend simply replacing “Employment Department” with the name of the entity administering an equivalent plan.}

Application

Employees may submit applications for Paid Leave Oregon (PLO) to the Oregon Employment Department (“Department”).¹ Applications may be submitted up to 30 days prior to the start of the leave and up to 30 days after the start of the leave.² The Department may require verification from the employee.³ The Department will make all decisions regarding acceptance and denial of an application, including determining the amount of the benefit.⁴ The district cannot accept, file, process or make decisions on applications.

An employee may appeal an approval or denial of claim, the amount of a weekly benefit or a disqualification from receipt of benefits to the Department in accordance with Oregon Revised Statute (ORS) 657B.410 and Oregon Administrative Rule (OAR) 471-070-8005.

Employee Notice to District

If the leave is foreseeable⁵, the employee must provide the district with written notice⁶ at least 30 calendar days prior to the leave.^{7} If the leave is not foreseeable⁸ the employee must give oral notice to the district

¹ For application requirements see ~~ORS 657B.060 and~~ Oregon Administrative Regulation (OAR) 471-070-1100. Applications can be submitted at <https://frances.oregon.gov/>.~~{Include link to Department website once available.}~~

² Exceptions may be granted when the applicant can demonstrate good cause for late submission.

³ See verification requirements in OAR 471-070-1110 - OAR 471-070-1130.

⁴ The benefit may be less than the employee’s salary. See ORS 657B.050.

⁵ Examples of foreseeable leave include, but are not limited to, an expected birth, planned placement of a child, or a scheduled medical treatment for a serious health condition of the eligible employee or a family member of the eligible employee. See OAR 471-070-1310~~(4)~~.

⁶ Written notice includes, but it not limited to, handwritten or typed notices, and electronic communication such as text messages and email.

⁷ ~~{OAR 471-017-1310(65)}~~ states “An employer that requires eligible employees to provide a written notice before the eligible employee commences leave, must outline the requirements in the employer’s written policy and procedures.”}

⁸ Leave circumstances that are not foreseeable include, but are not limited to, an unexpected serious health condition of the eligible employee or a family member of the eligible employee, a premature birth, an unexpected adoption, an unexpected foster placement by or with the eligible employee, or for safe leave.

within 24 hours of the start of the leave, and must provide written notice within 3 days after the start of leave.⁹ The district requests as much advanced notice as possible.

The notice must include:

1. The employee's first and last name;
2. Type of leave;
3. Explanation of the need for leave; and
4. Anticipated timing and duration of leave, including if it is continuous or intermittent.

Notice need only be given one time, but the employee shall notify the district as soon as practicable if dates of scheduled leave change, are extended, or were initially unknown. This notice does not need to mention PFMLI or PLO to satisfy the notice requirements.^{10} Notice may be provided by another party on behalf of the employee in accordance with state law.

Failure to comply with these notice requirements may result in a penalty imposed by the Department. The Department may reduce the amount of the benefit by 25 percent in accordance with OAR 471-070-1310(9)-(10).

Concurrent Use of District-Provided Paid Leave^{11}

The district [allows^{12}]-[does not allow] employees to use all or a portion of employer-provided paid leave in addition to receiving PLO benefits to replace an employee's wages up to 100 percent of the eligible employee's average weekly wage. [Example:

An employee applies and is approved for PLO for a personal serious medical condition, which also qualifies for OFLA leave. The Department determines that the rate of pay will be 75 percent of the employee's regular salary. [The employee will not be allowed to use district-provided paid leave (sick, vacation or otherwise) for days that PFMLI is received.] [The employee will be allowed to use available district-provided paid leave (sick, vacation or otherwise) for days that PLO is received, but is limited to only utilizing an amount that increases the employee paid leave to 100 percent of regular payment. In this example, the amount would be 25 percent. Because of the overlap with OFLA leave, the employee will be able to choose how much other paid leave to use (which may result in the employee receiving more than 100 percent of their typical salary).]

⁹ An eligible employee who takes safe leave shall give the employer reasonable advance notice of the individual's intention to take safe leave, unless giving the advance notice is not feasible. If other leave also applies (OFLA, FMLA, etc.), notice requirements for those types of leave may also apply.

¹⁰ {A district requiring written notice must outline the requirements in policy and procedures. A copy of the written policy and procedure must be provided to all eligible employees at the time of hire and each time the policy and procedure changes and in the language that the employer typically uses to communicate with the employee.}

¹¹ {Consider any bargaining requirements prior to adopting this language.}

¹² {See Oregon [Bureau of Labor and Industries opinion letter](#), April 7, 2023. Because most PMFLI leave will also qualify for OFLA leave, OSBA recommends allowing the employee to use employer-provided paid leave for all PMFLI. A decision to not allow employees to use employer-paid leave could apply to situations eligible for PMFLI leave, but not OFLA leave.}

Return to Work

Upon completion of leave, the employee is entitled to return to the position held in the district prior to the leave, if that position still exists and if the employee had been employed in the district for 90 days prior to taking leave.¹³ [*For districts with 25 or more employees:*] **If the position no longer exists, the employee is entitled to a position equal to their previous position, with equal benefits, pay and other terms and conditions of employment.** [~~*For districts with fewer than 25 employees:*] If the position no longer exists, the employee may be placed in a different position with similar job duties and benefits and pay equal to the previous position.~~]

Communications Between the District and the Department

Upon receipt of an application or update in information from a district employee for PLO, the Department will notify the district. The district may provide additional information to the Department within 10 days. This information may include, but is not limited to, information about the employee's notice to the district or verification of the employee's continued employment with the district. If the district does not report such information to the Department, the Department will proceed using available information. The district can provide additional information to the Department as it becomes available.

If the Department requests additional information from the district, the district will respond within 10 calendar days.

Once the Department has issued a decision regarding an application submitted by an employee of the district, the Department will notify the district regarding the approval or denial and any applicable dates and periods of leave. ~~The district cannot appeal a Department decision.~~

District Notice to Employees

At the time of hire and each time the policy or procedure changes, the district must provide notice to employees. This notice must be in the language that the employer typically uses to communicate with employees and will include:

1. The right of an eligible employee to claim and receive family and medical leave insurance benefits;
2. The procedure for filing a claim for benefits;
3. That an eligible employee must provide notice to the district before the employee commences leave, and a description of the penalties for failure to comply with the notice requirements;
4. The right of an eligible employee to job protection and benefits continuation;
5. The right of an eligible employee to appeal a decision or determination made by the Department director;

¹³ If the employee's leave also qualifies for OFLA/FMLA protection, see also Board policy GCBDA/GDBDA - Family Medical Leave and its accompanying administrative regulations.

6. That discrimination and retaliatory personnel actions against an employee for inquiring about the PFMLI or PLO program, giving notification of leave under the program, taking leave under the program or claiming PFMLI or PLO benefits are prohibited;
7. The right of an employee to bring a civil action or to file a complaint for violation of ORS 657B.060 or 657B.070; and
8. That any health information related to family leave, medical leave or safe leave provided to the district by an employee is confidential and may not be released without the permission of the employee unless state or federal law or a court order permits or requires disclosure.¹⁴

The district will display the Department's notice poster in an area that is accessible to and regularly frequented by employees in each building or worksite. The district will provide this notice poster to employees working remotely by hand delivery, regular mail or through an electronic delivery method at the time of hire or assignment to remote work.

District Filings

The district will file the Oregon Quarterly Tax Report, the Oregon Employee Detail Report and any other reports required by law. If the district fails to submit required filings or report, or fails to pay all required contributions, the district may be penalized in accordance with OAR 471-070-8520.

~~{For districts with fewer than 25 employees:}~~ [The district may apply for an assistance grant.¹⁵]

Employee Protections

No employee or prospective employee will be discriminated or retaliated against for inquiring about PFMLI or PLO, giving notification of leave under PLO, taking PLO leave or claiming PLO benefits. Eligible employees have a right to file a complaint and/or bring a civil action for violations of ORS 657B.060 or ORS 657B.070.

Any health information related to family leave, medical leave or safe leave provided to the district by an employee is confidential and may not be released without the permission of the employee unless state or federal law or a court order permits or requires disclosure.

¹⁴ Paid Leave Oregon has will provided a model notice, <https://paidleave.oregon.gov/DocumentsForms/Paid-Leave-ModelNotice-Poster-EN.pdf>. ~~This policy can also be used as the notice.~~

¹⁵ See OAR 471-070-3705 - 3710 for eligibility requirements and application.

h. LBEA - Resident Student Denial for Virtual Public Charter Attendance

OSBA Model Sample Policy

Code: LBEA

Adopted:

Resident Student Denial for Virtual Public Charter School Attendance**

{Conditionally Required. This policy is required if the district plans to deny enrollment of a student to attend a virtual public charter school. OAR 581-026-0007}

The district is not required to approve a transfer of a resident student, when more than three percent of the students residing in the district are attending a virtual public charter school not sponsored by the district. The district will ~~{¹annually, [by October 1]}~~ [semiannually, [by October 1 and April 1]] ~~[by {December 1}]~~, calculate the percentage of ~~the number of~~ students residing in the district, who are ~~enrolled in~~ attending a virtual public charter school not sponsored by the district. When the established percentage is more than three percent, the district will not approve additional students enrollment to such a virtual public charter school, ~~subject to the requirements in Oregon Administrative Rule (OAR) 581-026-0305(2).~~

~~The district may send a notice of approval or disapproval to a parent² of a student who has sent a notice to the district of intent to enroll the student in a virtual public charter school not sponsored by the district (See OAR 581-026-0305(3)).~~ A parent must give notice to the district of intent to enroll their student in a virtual public charter school not sponsored by the district, before enrolling their student in such a school and notice of actual enrollment. ~~The district may respond with an approval or disapproval to a parent within [five] [eight] business days³ of receipt of the notice from the parent.~~

If the district is not approving the enrollment, the district must respond with a decision to not give approval within 10 calendar days of receipt of the notice of intent from the parent. Such decision must include:

1. The percentage of students in the district that attend virtual public charter schools that are not sponsored by the district, based on recent calculations;
2. The right to appeal the decision to the State Board of Education;
3. A list of two or more other online options available to the student; and
4. A copy of OAR 581-026-0305 and OAR 581-026-0310.

The district is only required to use data that is reasonably available to the district, including but not limited to the following for such calculation:

1. The number of students residing in the district enrolled in the schools within the district;

¹ ~~{Per OAR 581-026-0305(7)(a) the district must choose annual, semi-annual or other date used for calculation; dates are provided as a recommendation only.}~~

² ~~“Parent” means parent, legal guardian or person in “parental relationship” as defined in Oregon Revised Statute (ORS) 339.133.~~

³ ~~{If a parent does not receive a notice of approval or disapproval from the district within 14 days of sending the notice of intent to enroll to the district, the student shall be deemed approved for enrollment by the district.}~~

2. The number of students residing in the district enrolled in public charter schools located in the district;
3. The number of students residing in the district enrolled in virtual public charter schools;
4. The number of home-schooled students who reside in the district and who have registered with the educational service district; and
5. The number of students who reside in the district enrolled in private schools located within the school district.

A parent may appeal a decision of a district to not approve a student enrollment to a virtual public charter school to the State Board of Education under OAR 581-026-0310.

If the student was enrolled in a virtual public charter school while living in another district and has maintained continuous enrollment in such school since moving into, and residing in this district, approval is not required.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

[ORS 338.125](#)

[OAR 581-026-0305](#)

[OAR 581-026-0310](#)

[House Bill 3024](#) (2023).

8. Second Reading
9. Board Comments
10. Future Agenda Items
11. Key Dates
 - October 9-13, Homecoming Week
 - October 11, Homecoming Parade 7:00 PM
 - October 13, Teacher Work Day
 - October 18, Work Session 6:00 PM
 - October 27, Inservice / Grading Day
 - October 30, Hearing Screening - Grades K,1 & 3
 - November 1, Red Cross Blood Drive
 - November 16, Alsea School Board Meeting 7:00 PM