# Regular School Board Meeting

Tuesday, October 27, 2026 6:00 PM
District Office , 150 SW Evergreen, Mill City, OR 97360

1. **Call to Order**

2. **Flag Salute**

3. **Approval of / or Changes to the Agenda**

4. **Public Comment**
   **Thank you for being at the Santiam Canyon School District 129J board meeting tonight. Hearing from our families and community is important to us. During this section, the board's role is to listen. While we may ask clarifying questions from time to time, we will not be engaging in dialogue with people making comments. When follow-up is warranted, that will usually be done through our superintendent. In accordance with policy BDDH, speakers may offer objective criticism of district operations and programs, but the board will not hear comments regarding any individual district staff member. Those comments can be submitted to the district in accordance with district policy. The board requests commenters be respectful and to please keep all comments to 3 minutes per person. As you begin, please state and spell your name for the record, and if you are representing an organization, please state the organization. Thank you.**
5. **Consent Agenda**

5.1. September 16, 2026 Board Meeting Minutes

5.2. September 30, 2026 Work Session Minutes

5.3. Resignations

5.3.1. Jeffrey Benjamin - SES Instructional Assistant
5.3.2. Savannah Koobs - SES Instructional Assistant
5.4. Hires

5.4.1. Jammie Pugmire - SJSHS Instructional Assistant
5.4.2. Jeffrey Benjamin - SJSHS Science Teacher

5.4.3. Kattie Sorrick - SES Instructional Assistant
6. **Staff Report**

6.1. Educational Spotlight - Jill Saari, SCSD Behavioral Specialist

6.2. ORCA - Allison Galvin

6.3. Santiam Elementary School - Alisha Hansen

6.4. Santiam Jr./ Sr. High - Phil Kelly

6.5. Financial Report - Nichole Cooper

6.6. Superintendent Report - Krista Nieraeth

6.7. Enrollment Report - Krista Nieraeth

6.8. Attendance Report - Krista Nieraeth

7. **Informational Items**

7.1. Sick Leave / Sick Time Information

7.2. Fall Interim Assessment Data for SES / SJSHS, grades K - 8

7.3. Division 22 Standards for 2025 - 2026 School Year

7.4. OSBA Resolution Review - Resolution 1

7.5. SJSHS Social Studies Curriculum Adoption

8. **Action Items**

8.1. Accept Resignation of Board Position #5, Carl Anderson

8.2. Declare Santiam Canyon School District 129J Board of Directors Position #5 open

8.3. Approval of Superintendent Evaluation Process & Timeline

8.4. Approval of Superintendent Goals for the 2026 - 2027 School Year

8.5. 2026 - 2027 Academic Calendar - Amended

8.6. PERS Side Account Resolution

8.7. Board Meeting Dates Discussion

9. **Items for the Next Meeting/ Board Comments**

10. **Important Dates**
**10/30 Grading Day**
**11/11 Veteran's Day- NO SCHOOL**
**11/12-14 OSBA Conference- Portland**
**11/13 Friday School**
**11/18 School Board Meeting 6pm**
**11/19-20 Parent Teacher Conferences**
**11/25-27 Thanksgiving Break**
**12/16 School Board Meeting - 6pm**
**12/18 Half Day**
**12/21-1/1 Winter Break**
**01/04 Staff Inservice**
**01/05 School Resumes**

11. **Adjourn**

**Santiam Canyon School Board of Directors**
**Regular School Board Meeting**
**September 16, 2026 6:00 pm**
**Santiam Canyon District Office**

**Board Members Present:** Elizabeth Reeser, Melissa Allison, Doug Cole,
**Absent:** Lynda Harrington

**Staff Present:** Krista Nieraeth, Phil Kelly, Alisha Hansen, Sam Proctor, Nichole Cooper, Jess Rist, Lisa Follis,

**Visitors:** Melody Rossitier,

**1.0 Call to Order:**

Mrs. Reeser called the board meeting to order at 6:02 pm.

**2.0 Flag Salute**

Mrs. Reeser led the Pledge of Allegiance

**3.0 Approval of/or Changes to the Agenda:**

Mrs. Allison motioned to accept the agenda as presented.

Mr. Cole second.

No Discussion. Motion passed 3-0

**4.0 Public Comment**
None

**5.0 Consent Agenda**

Mr. Allison motioned to accept the consent agenda.

Mr. Cole seconded.

No Discussion. Motion passed 3-0

## 6.0 Staff Reports

### 6.1 ORCA - Mrs. Galvin- was not present

The board report is available online. Ms. Nieraeth advised the board Ms. Galvin was not able to attend but wanted to invite the board members to the OCA Open House taking place Friday here at SES.

### 6.2 Santiam Elementary School - Alisha Hansen

Mrs. Hansen presented her report, which is available online. She reported 57% attendance at the Open House and corrected the attendance increase reported in her report to 7.3%. The attendance improvement goal for this school year remains 10%.

### 6.3 Santiam Jr./Sr. High School - Phil Kelly

Mr. Kelly presented his report, which is available online. In response to a question from Mrs. Reeser, he confirmed that homecoming will be held the week of October 5th. Mrs. Allison expressed appreciation for the schedules that were shared.

### 6.4 Student Services - Jess Rist

Mrs. Rist presented her report, which is available online. She expressed appreciation for the program's low staff turnover, noting that AJ Rock's thorough knowledge of program processes and the longstanding relationships between staff and students have been valuable assets.

In response to a question from Mrs. Allison, Mrs. Rist explained that the speech-language pathologist provides eight hours of service per week, which does not include direct work with students. The district has hired a speech-language pathology assistant who works with students on-site.

### 6.5 Financial Report – Nichole Cooper

Mrs. Cooper presented her report, which is available online. She explained that when the financial report was rolled forward to the new fiscal year, several percentages carried over at higher levels instead of resetting to 100%, overstating several revenue projections. She provided examples and stated that next year's process will include verifying that the percentages are reset to 100%.

Mrs. Cooper shared that reviewing questions with Mrs. Allison was helpful and provided a handout to clarify the information for the Board. In response to a question from Mr. Cole, she explained that percentages may be adjusted to reflect changes in anticipated revenue or expenditures, such as higher property tax receipts or spending above projections. The Board thanked Mrs. Cooper for her work.

Ms. Nieraeth asked whether Board members had received their audit questionnaires. Mrs. Cooper noted that some had already been returned and asked the remaining members to complete and submit them to her. In response to Mr. Cole, she confirmed that changing the Board meeting date had been helpful.

Mrs. Allison asked whether the PERS side account was included in the financial reports. Mrs. Cooper indicated that it would need to be monitored. When Mrs. Allison asked about other options for the district, Mrs. Cooper referred the question to the PERS presenter.

**6.6 Superintendent Report – Krista Nieraeth**

Ms. Nieraeth presented her report, which is available online. She shared that the Doris Wippler Fund has fully funded the preschool program for the upcoming school year. She also reviewed the accountability bill, its requirements, and the information that will be submitted to ODE.

The Board discussed state testing and the opt-out law. Mrs. Reeser shared that students she has spoken with often choose not to participate because they do not see an impact on their grades or other outcomes. Ms. Nieraeth emphasized the importance of assessment participation and the need to strengthen the district's testing culture. In response to a question from Mr. Cole, she clarified that students who opt out do not receive a zero.

Mrs. Allison asked about ongoing efforts to address truancy. Ms. Nieraeth reported that Malheur County recently worked with county commissioners to adopt an ordinance allowing citations for truancy. She also shared that Linn County superintendents have met to explore a similar approach, which would require collaboration with county officials.

**6.7 Enrollment Report - Krista Nieraeth**

Ms. Nieraeth presented her report, which is available online. Ms. Nieraeth let the board know that we have gone down 16 students in enrollment and the majority is at the SJSHS.

**7.0 Action Items**

**Second Reads**

7.1.a BCB - Board Officers
7.2.b BD - Board Meetings, Notices and Communications
7.3.c BD/BDA - Board Meetings - DELETE
7.4.d BDC - Executive Session
7.5.e CBA - Qualifications and Duties of a Superintendent
7.6.f CBG - Evaluation of the Superintendent

7.7.h DIC - Financial Reports and Statements
7.8.i DJB - Petty Cash Accounts
7.9.j EBBA - Student Health Services
7.10.k GBN/JBA - Sexual Harassment
7.11.m IMB - District Improvement Program
7.12.n JBA/GBN - Sexual Harassment
7.13.o KBA - Public Records Request
7.14.p KNA - Immigration Enforcement on District Property

Ms. Nieraeth informed the Board that the sick time policy was removed from consideration following the first reading due to questions raised about it. She will review the policy and the purpose of the underlying law with Lindsay Sloan and OSBA and provide additional information to the Board. Fourteen of the fifteen policies are being presented for consideration.

Mrs. Allison motioned to approve policies listed under 7.1 as presented

Mr. Cole seconded

No Discussion. Motion passed 3-0

## 8.0 Informational Items

### 8.1 PERS Side Account Presentation - Brendon Watkins

Mr. Watkins provided an overview of PERS side accounts, explained how they work, and reviewed the history of the district's current account. He answered questions from the Board and explained that market conditions are being monitored, with another market check planned after the elections.

Mr. Watkins also reviewed the timeline for participation, noting the November 15, 2026, deadline. Ms. Nieraeth stated that she would bring a resolution to the Board in October for consideration. If the Board authorizes participation, the district would proceed only if the TIC rate is 5.00% or lower.

The full presentation is available online.

### 8.2 SIA Annual Report

Ms. Nieraeth presented the Integrated Programs school report, including the two narratives required by the state. She reported that the greatest progress in student

growth and achievement has occurred in the lower grades. At SES, Mrs. Hansen has strengthened data teams and professional learning communities (PLCs) to target interventions and support data-informed instructional decisions. Staff have also participated in training on the science of writing. Last year, most elementary instructional assistants completed eight weeks of literacy strategy training and are now considered highly qualified tutors. Mrs. Hansen will visit other elementary schools to learn about their implementation of early literacy strategies and share those practices with district staff.

At the secondary level, interim assessments were implemented last school year. Ms. Nieraeth identified strengthening data systems and data teams at SJSHS as an area for continued growth, particularly in using assessment results to guide instruction and interventions. Mr. Kelly and Ms. Jungwirth will work with the data teams to identify trends and determine appropriate responses. The district will support this work through assistance from ESD and ODE.

Ms. Nieraeth also shared that the district is reviewing curriculum, assessments, and instructional tools while working to vertically align the two schools to support smoother transitions for students as they move into higher grades.

**9.0 Items for the Next Meeting / Board Comments**

Ms. Nieraeth will bring the resolution for the PERS Side Account to the next meeting October 21st, 2026**.** Mr. Cole asked about the plans for the vacant lot recently purchased. Ms. Nieraeth said that is something they can visit about later outside of the meeting. Mr. Cole asked if we would be revisiting looking at different curriculums. Ms. Nieraeth stated Mrs. Jungwirth is going to begin the process of looking again and thinks it would be a good idea to have a Board Member be a part of the process. Ms. Nieraeth will bring more information to the October board meeting.

**10.0 Important Dates**

9/18 - Certified Staff Inservice Day
10/2 - Certified Staff Inservice Day
10/16 - Certified Staff Inservice Day
10/21 - October Board Meeting @ 6pm
10/30 - Grading Day
11/11 - Veteran's Day - NO SCHOOL
11/12-14 - OSBA School Board Annual Convention
11/13 - Friday School
11/18 - November Board Meeting @ 6pm

11/19-20 - District Parent/Teacher Conferences
11/25-27 - Thanksgiving Break

**11.0 Adjourn**

Meeting Adjourned at: 8:16 pm

**Santiam Canyon School District Board of Directors**
**Work Session**
**September 30th, 2026 6:00 pm**
**Santiam Canyon School District Office Conference Room**

**Board Members Present:** Elizabeth Reeser, Melissa Allison, Lynda Harrington, Doug Cole joined at 6:40 pm,

**Staff Present:** Krista Nieraeth, Lisa Follis

**OSBA Facilitator:** Janet Avila-Medina

**1.0 Call to Order:**

Mrs. Reeser called the board work session to order at 6:00 pm

**2.0 Flag Salute:**

Mrs. Reeser led the Pledge of Allegiance.

**3.0 Approval of Agenda:**

Mrs. Allison motioned to accept the Agenda as presented.

Mrs. Harrington second,

No Discussion. Motion passed 3-0

**4.0 Superintendent Evaluation Training:**

The Board participated in Superintendent Evaluation Training facilitated by Janet Avila-Medina of the Oregon School Boards Association (OSBA). The training provided a refresher on the OSBA-recommended evaluation process, including tools, timelines, and best practices.

Ms. Avila-Medina invited feedback on the previous year's process. Mrs. Allison stated that the process went well and expressed interest in preparing the Board to conduct future evaluations independently. In response to Mrs. Reeser's question about other districts' practices, Ms. Avila-Medina explained that some boards prefer ongoing OSBA guidance, while others conduct evaluations independently after receiving assistance for one or two

years. Mrs. Reeser expressed appreciation for the evaluation summary provided by Ms. Avila-Medina. Mrs. Harrington asked about including staff feedback. Ms. Avila-Medina noted that staff feedback was not included the previous year and would be discussed during the presentation.

The Board reviewed the evaluation timeline. Ms. Nieraeth recalled that the previous year's process began in November and felt rushed. She expressed appreciation for beginning earlier and requested that dates be established to support timely completion. When the March 15 deadline was referenced, Ms. Nieraeth stated that she believed her contract specified an April 7 deadline.

Ms. Avila-Medina reviewed the five components of the evaluation tool and explained how they work together. She clarified that evaluation goals are specific to the Superintendent's leadership, although they may align with district and Board goals. Ms. Nieraeth stated that her contract identifies the COSA/OSBA Model 1 evaluation tool, but the Board would still need to adopt the evaluation criteria.

Ms. Avila-Medina recommended establishing the evaluation timeline at the next Board meeting by working backward from the contractual deadline. She reviewed the stages of the process and recommended two Superintendent check-ins to provide ongoing feedback and avoid surprises during the final evaluation. Ms. Nieraeth requested an editable Word version of the timeline so proposed dates could be added for Board consideration.

The Board also discussed an optional staff survey. Ms. Avila-Medina explained that the survey is a separate service billed hourly and would focus on up to three standards selected with OSBA's assistance, particularly areas the Board does not directly observe. In response to Mrs. Harrington's question about sample size, Ms. Avila-Medina stated that participation would depend on district needs and would be determined during planning. OSBA would administer the survey and compile the results for the Board's use in the Superintendent's evaluation.

Ms. Avila-Medina reviewed OSBA service costs and the evaluation rating rubric. She stated that she would provide additional information to Ms. Nieraeth for Board consideration in October.

## 5.0 Adjourn

Mrs. Allison motioned to adjourn the meeting,

Mrs. Harrington seconded the motion.

No Discussion. Motion passed 4-0.

Meeting adjourned at 6:49 pm.

**School Leader Report**
**October 21, 2026**

**Enrollment**

| October 13, 2026 | September 8, 2026 | September 30, 2025 | October 1, 2024 |
|---|---|---|---|
| 2,647 | 2,551 | 2,543 | 2,372 |

**What's Happening in October**

- Student Clubs: Student Club sign-ups started the first week of October. There are approximately 40 student-suggested clubs that students can participate in. Examples include the Esports team, ORCA Cares Club, Chess Club, Bakers Club, Music Club, and so many more. Clubs have become a cornerstone of the student experience because they are a great way for ORCA students to meet other students with common interests.

- Stomp Out Bullying: October is National Bullying Prevention Month, and ORCA focuses on the "Stomp Out Bullying" theme. Counselors are attending live classes to discuss kindness, teachers are integrating the kindness theme into their instruction, and the student government is hosting school assemblies that focus on embracing an environment free of bullying. These are special events with a great impact on those who participate.

- Great Oregon ShakeOut: The Great Oregon ShakeOut was on October 15, 2026, at 10:15 a.m. Even though we are a virtual school, our staff practiced emergency preparedness and earthquake safety during virtual classes at this time. This was a fun way for ORCA's students to virtually participate in this international day while still learning valuable skills.

- In-Person Events: ORCA students have access to more in-person events in October. On October 2, 2026, ORCA's first regional event day was held in parks around Oregon for students to come together, meet other students in their area, and get to know each other. Friday, October 9 was our first "Hangouts" in Wilsonville, where students can come socialize and play games with students in their same grade bands. Finally, on Friday, October 30, we have another Regional Event Day. Our goal is to build connection and community early in the year so students feel more comfortable engaging the rest of the year.

- School Spotlight: Shout-out to CTE teacher Summer Highfill and the Hotel, Tourism and Hospitality Pathway at ORCA. Recently, *Travel Oregon* published an article about how to get involved with careers in tourism. ORCA is the only school to receive an individual acknowledgement of our program. Click here to read the article.

**School Leader Report**
**October 21, 2026**

**September Data**

- Open House: The annual Open House was on Friday, September 25, 2026, at Santiam Elementary School. While the weather deterred attendance a little bit, overall, it was still a wonderful day for students and parents to meet their teachers, shop at the Book Fair, and take school pictures. Our Student Government also hosted a food drive where ORCA families donated approximately 223 lbs of food – our biggest food drive yet! Becoming Oregon Charter Academy has built a special school community among our students and staff. Events like Open House just highlight how special ORCA is and how personalized the virtual learning environment can be. Thank you for sharing your beautiful facilities with us to host this wonderful event!

  Please see below for the attendance at Open House:

| Open House | ORCA Students | Non-Students (Minors) | Adults | Total |
|---|---|---|---|---|
| **2026** | 286 | 30 | 342 | 658 |
| **2025** | 323 | 31 | 351 | 705 |
| **2024** | 297 | 47 | 305 | 649 |
| **2023** | 230 | 42 | 232 | 504 |

- 10-Day Withdrawals: Another fun celebration is our 10-day withdrawal data at the beginning of the year. These are students who were enrolled by the first day of school but never “showed up” and were withdrawn on day 11 of school. 10-day withdrawals are much more prevalent in virtual schools given the rate of student mobility. This data models the amazing work our staff does to connect with students. I am beyond proud of all of Team ORCA!

| Number of Students Withdrawn on Day 11 | | | |
|---|---|---|---|
| 2026 | 2025 | 2024 | 2023 |
| 9 (out of 2,541) | 7 (out of 2,460) | 8 (out of 2,271) | 13 (out of 2,063) |

Thank you for your continued support in helping us make the Oregon Charter Academy experience the best it can be for families and staff. This is a special place that is successful because the district, board, staff, and families all recognize that we are working in collaboration to support student success. Thank you!

# SANTIAM ELEMENTARY SCHOOL

STAND TOGETHER • FIND YOUR PATH • NEVER GIVE UP

Alisha Hansen, Principal
alisha.hansen@santiam.k12.or.us
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450 SW Evergreen St.
503-897-4034 Fax
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**Board Report -** October, 2026

## Highlights

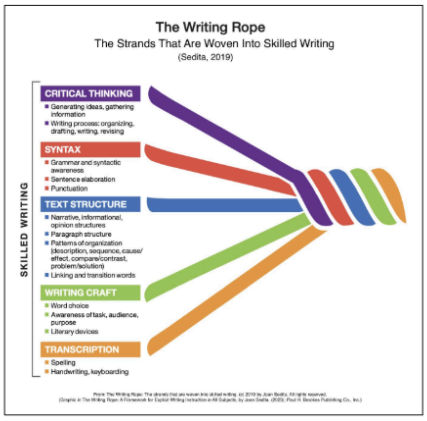
- **Library Grant:** Sarah Martinez, our kindergarten IA and librarian, was awarded a $5,000 Dollar General Literacy Foundation grant to purchase nonfiction books! She has been busy removing outdated nonfiction materials while awaiting the grant check.
- **Jog-a-Thon PE Fundraiser**: Marshall Anderson, our new PE teacher, organized and led our Jog-a-Thon fundraiser. Our students raised $9,456.78 to purchase PE equipment for our school!
- **Social-Emotional Learning Curriculum Adoption:** Our Second Step subscription ends at the close of this school year, so we are beginning to explore SEL curricula, including Move This World, Schoolbeat, and Character Strong. I would like to invite a board member to serve on the SEL adoption team. Please contact Alisha Hansen if you are interested.
- **Science of Reading/Writing with LBL ESD:** I met with Tami DuFalut-Toomb from LBL ESD in June and September to plan professional development that connects the Science of Reading training our IAs received last year with the Science of Writing. Tami developed two four-hour sessions for our staff tailored to our data and student needs.

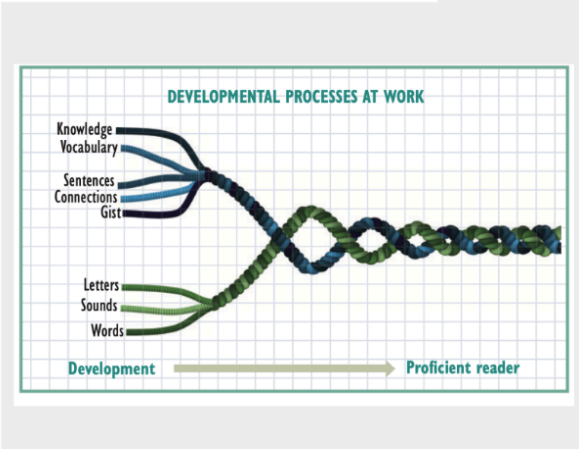
  **-Professional Development Pictures**

  **The Reading Writing Connection:** The Writing Rope-This diagram shows how critical thinking, syntax, text structure, writing craft, and transcription work together to develop skilled writers. The Reading Process-This diagram shows how recognizing letters, sounds, and words combines with vocabulary, knowledge, and understanding ideas to develop proficient readers. Together, these diagrams show that reading and writing involve interconnected skills. Strengthening vocabulary, sentence understanding, and knowledge supports students in both.

NON-DISCRIMINATION: The Santiam Canyon School District 129J is committed to establishing and maintaining a safe and nondiscriminatory educational environment. Santiam Canyon School District 129J does not discriminate and prohibits discrimination in any programs or activities on the basis of protected class, including age, citizenship status, color, disability, gender identity, immigration status, marital status, national origin, race, religion, sex, or sexual orientation. The following employees have been designated to handle questions and complaints of alleged discrimination: Krista Nieraeth, Title IX and Civil Rights Coordinator, krista.nieraeth@santiam.k12.or.us or (503) 897 – 2321 Jess Rist, Section 504 and ADA/Title II Coordinator, jess.rist@santiam.k12.or.us or (503) 897 - 2321.

# The Reading Writing Connection




**Staff Learning in Action:** The staff picture shows us discussing how cognitive load impacts learning. Tami asked us to use our non-dominant hand to write about a hero or mentor who positively impacted our lives. This activity helped us experience how the effort required for handwriting can make it harder to express our thoughts, demonstrate what we know, and reinforce our learning. It also highlighted the importance of embedding explicit handwriting instruction into literacy instruction.



SANTIAM WOLVERINES

STAND TOGETHER • FIND YOUR PATH • NEVER GIVE UP

Phil Kelly, Principal
Amber Jungwirth, Assistant Principal
Jessica Benavidez, Office Manager

300 SW Cedar St, PO Box 199
Mill City, OR 97360
503-897-2311 Ph. 503-897-3154 Fax

**Board Report - October, 2026**

**New Class:**

- This year we kicked off “That’s Debatable,” a new elective for our 9th and 10th graders. Students learn to dig into an issue, support their arguments with evidence, and confidently make their case. They also practice listening to the other side and responding respectfully, even when things get heated. These skills will serve them in every class and well beyond high school, and the class gives students a fun new way to find their voice and connect with each other.

**Dual Credit Courses:**

- College might feel a ways off for our students, but plenty of them are already earning credits! Through our partnerships with Western Oregon University and Oregon Institute of Technology, students can take dual credit classes that count for both high school and college. It’s a great way to get ahead, save families money down the road, and show students they can handle college-level work. The courses include:
    - BIO 103 - Introduction to Human Anatomy & Physiology
    - CH 104z - Introduction to Chemistry
    - COM 111z - Public Speaking
    - MTH 111z - Precalculus I: Functions
    - MTH 112z - Precalculus II: Trigonometry
    - MTH 251z - Differential Calculus
    - MTH 252z - Integral Calculus
    - WR 121z - Composition I
    - WR 122z - Composition II

**Outdoor School:**

- In September, our 6th graders spent five days at Outdoor School and had a fantastic time! It’s a classic rite of passage, and they came home with plenty of stories, stronger friendships, and memories they’ll hang onto for years.

**Culinary:**

- Our culinary students just wrapped up week four of Santiam Mix-Up, and it’s been a hit! Each Monday, district staff get an email with the week’s menu and place their orders online. On Wednesday, students cook and deliver lunch to staff. This past week was Greek Week, and the menu included Greek salad, gyros, and lemon chicken soup. Students are getting hands-on practice with everything from menu planning and prep to

filling orders and making deliveries. Wednesdays have quickly become something everyone looks forward to.

**Automotive:**

- The automotive shop has been buzzing lately! Students are rebuilding a lawn mower motor and a Gator engine, and they're just wrapping up a new water pump and alternator on a classmate's pickup. Next week they'll hit pause for a day to clean up and get the tools organized again before diving into the next round of projects.

**Construction:**

- Our construction CTE students have been putting their skills to work right here on campus. They recently remodeled the timing shed at the track, adding new countertops that got their first workout last week serving hamburgers to fans at the football game. We're also working on getting our portable sawmill back up and running, and we're looking into training programs so students can safely learn to use chainsaws. There's a lot of exciting work on the horizon for this group.

**Homecoming:**

- Homecoming Week is in the books, and what a week it was! Students and staff went all in on the dress-up days, and it was awesome to see so many people getting into the spirit. Our leadership kids pulled off a bonfire and a homecoming dance, both a ton of fun. Campus energy was great, and it was a fantastic way to bring everyone together.

**School of Rock:**

- Last Tuesday, our School of Rock students took the stage for their first concert. The students did a fantastic job, and it was awesome to see all their hard work and practice pay off in front of a crowd. Big shout-out to these musicians for putting on such a great show.

**FAFSA Night**

- This week we hosted FAFSA Night to help seniors and their families work through the Free Application for Federal Student Aid. Filling out the FAFSA can feel overwhelming, so having support right here at school makes a big difference. It's an important step in helping our students plan for life after graduation and access the financial aid they're eligible for.

**Coming Soon:**

- Conferences November 19th & 20th

# Santiam Canyon School District 129J

Post Office Box 197
150 SW Evergreen St.
Mill City, Oregon 97360
Office (503) 897-2321

Krista Nieraeth, Superintendent
Nichole Cooper, Business Manager
Lindsay Sloan, AP & Payroll
Lisa Follis, District Secretary


October 15, 2026

TO: Santiam Canyon Board
FROM: Nichole Cooper, Business Manager
RE: Financial Statements for fiscal year 2026-27

Board Members,

Attached are the financial statements through September 30, 2026. The reports include:

- General Fund Statement of Revenues – Budget vs. Actual
- General Fund Statement of Expenditures – Budget vs. Actual
- Total Appropriations for the year

**Fiscal Year 2026-27**

For July 1 through September 30, actual revenues and expenditures show an estimated Ending Fund Balance of **$7,769,956**. Of this total, **$4,928,242** is set aside as Contingency and Unappropriated Ending Fund Balance, leaving a remaining estimated Ending Fund Balance of **$2,841,714**. We will be reviewing enrollment and property tax revenue through the next month and make updates with ODE before the next recalculation of the State School Fund.

**Updates**

We are continuing to work with our audit firm to finalize our audit. Once the audit has been completed, the report will be presented to the board.

The district is currently reviewing all grant allocations and aligning the contracts with budgets. This is an important step in making sure there is a plan to expense all grant funds as the amount that was budgeted was estimated.

**Investments**
As of September 30, 2026, Santiam Canyon's investments in the Local Government Investment Pool total **$10,282,539.61**, earning an annualized interest rate of **4.02%**.

Please don't hesitate to reach out with any questions or concerns about these statements.


Santiam Canyon School District does not discriminate on the basis of race, religion, color, national origin, disability, marital status, sexual orientation, sex or age in providing or access to benefits of education services, activities and programs in accordance with Title VI, Title VII, Title IX and other civil rights or discrimination issues; Section 504 of the Rehabilitation Act of 1973, as amended; and the American with Disabilities Act.

The following has been designated to coordinate compliance with these legal requirements and may be contacted at the Santiam Canyon School District office for additional information and/or compliance issues:, Title II Coordinator, Title IX Coordinator and Section 504 Coordinator: Director of Special Programs, 150 SW Evergreen St./PO Box 197, Mill City, OR 97360, (503) 897-2321

**Santiam Canyon School District 129J**
General Fund: Statement of Revenues Budget Vs. Actual
For the Fiscal Year 2026-27

| Source | Budget 2026-27 | Actual YTD Rev. 9/30/2026 | Projected through 6/30/2026 | Total Estimated 2025-26 | (Over)/Under Budget | Budget 2025-26 | Actual YTD Rev. 6/30/2026 |
|---|---|---|---|---|---|---|---|
| SSF Funding | | | | | | | |
| 1111 Current Year Property Taxes | 2,947,164 | - | 2,947,164 | 2,947,164 | - | 2,583,621 | 2,748,504 |
| 1112 Prior Year's Property Taxes | 40,000 | 25,121 | 14,879 | 40,000 | - | 29,286 | 52,971 |
| 1114 Payment in Lieu of Poperty Taxes | 13,370 | 23 | 13,347 | 13,370 | - | 13,370 | 13,170 |
| 1190 Penalties & Interest on Investments | 5,800 | - | - | - | 5,800 | 13,567 | - |
| 2101 County School Funds | 2,500 | - | - | - | 2,500 | 2,500 | - |
| 3101 State School Support Funds | 45,103,091 | 14,124,681 | 28,253,599 | 42,378,280 | 2,724,811 | 39,521,666 | 42,277,307 |
| 3101 SSF - Due from ODE FY25-26 | | - | 472,691 | 472,691 | (472,691) | | |
| 3101 SSF - Small HS Grant | | - | - | - | - | | |
| 3101 SSF - Small HS/HC disability FY24/25 | | - | - | - | - | | |
| 3103 Common School Fund | 493,472 | - | 493,472 | 493,472 | - | 465,672 | 154,786 |
| 3104 State Timber | 300,000 | - | 300,000 | 300,000 | - | 300,000 | 340,097 |
| Total SSF Funding | 48,905,397 | 14,149,825 | 32,495,152 | 46,644,977 | 2,260,420 | 42,929,682 | 45,586,835 |
| **Total SSF Revenue** | **$ 48,905,397** | **$ 14,149,825** | **$ 32,495,152** | **$ 46,644,977** | **$ 2,260,420** | **$ 42,929,682** | **45,586,835** |
| **Non State School Support Formula Sources** | | | | | | | |
| **Local Sources** | | | | | | | |
| 1510 Earnings on Investments | 525,000 | 135,651 | 389,349 | 525,000 | - | 450,000 | 582,006 |
| 1710 Admissions/Fees | 10,500 | 2,146 | 8,354 | 10,500 | - | 10,000 | 10,454 |
| 1910 Rentals | 1,000 | - | 1,000 | 1,000 | - | 1,000 | 8 |
| 1920 Donations from Private Sources | 5,000 | - | 5,000 | 5,000 | - | 18,000 | - |
| 1943 Serv Provided to Charter School | 1,706,867 | 560,169 | 1,213,926 | 1,774,094 | (67,227) | 1,535,796 | 1,554,338 |
| 1960 Recovery of Prior Year Expenditures | | - | - | - | - | | 10,808 |
| 1990 Miscellaneous Local Revenue | 40,000 | 3,476 | 36,524 | 40,000 | - | 38,388 | 21,902 |
| 1991 Miscellaneous ERATE | 6,500 | - | 6,500 | 6,500 | - | 6,500 | 6,221 |
| Total Non Formula Local Sources | 2,294,867 | 701,442 | 1,660,652 | 2,362,094 | | 2,059,684 | 2,185,737 |
| **Intermediate Sources** | | | | | | | |
| 2102 ESD Apportionment | 350,000 | - | 350,000 | 350,000 | - | 288,000 | 32,020 |
| 2199 - Other Inter. Sources (HERT) | 500 | - | 500 | 500 | - | 500 | 1,062 |
| 2800 Revenue in Lieu of Taxes | | - | - | - | - | 500 | - |
| Total Intermediate Sources | 350,500 | - | 350,500 | 350,000 | - | 289,000 | 33,082 |
| **State/Federal Sources** | | | | | | | |
| 4201 Foster Care Transportation | | - | - | - | - | 5,000 | - |
| 4703 Carl Perkins | | - | - | - | - | 2,500 | 6,755 |
| 4801 Federal Forest | | - | - | - | - | | 62,007 |
| Total State/Federal Sources | - | - | - | - | - | 7,500 | 68,762 |
| | | - | | | | | |
| **Other Sources** | | | | | | | - |
| 5400 Beginning Fund Balance* | 5,865,688 | - | 6,611,364 | 6,611,364 | (745,676) | 5,226,881 | 5,862,904 |
| Total Other Sources | 5,865,688 | - | 6,611,364 | 6,611,364 | (745,676) | 5,226,881 | 5,862,904 |
| | | - | | | | | - |
| **Total Non SSF Revenue** | **$ 8,511,055** | **$ 701,442** | **$ 8,622,516** | **$ 9,323,458** | **$ (745,676)** | **$ 7,583,065** | **8,150,485** |
| **Total Resources** | **$ 57,416,452** | **$ 14,851,267** | **$ 47,729,032** | **$ 55,968,435** | **$ 1,514,744** | **$ 50,512,747** | **$ 53,737,320** |
| | | Less Estimated Requirements | | **$ 48,198,479** | | | |
| | | ***Estimated Ending Fund Balance*** | | ***$ 7,769,956*** | | | |
| | | ***Less Contingency & UEFB*** | | ***$ 4,928,242*** | | | |
| | | ***Estimated Ending Fund Balance*** | | ***$ 2,841,714*** | | | |

**Santiam Canyon School District 129J**

General Fund: Statement of Expenditures Budget Vs. Actual

For the Fiscal Year 2026-2027

| Function | Budget 2026-27 | Actual YTD EXP 9/30/2026 | Projected through 6/30/2026 | Total Estimated 2025-26 | (Over)/ Under Budget | % Committed | Budget 2025-26 | Actual YTD Exp. 6/30/2026 |
|---|---|---|---|---|---|---|---|---|
| **Instruction** | | | | | | | | |
| 1111 Elementary, K-5 or K-6 | 1,849,979 | 141,646 | 1,437,747 | 1,579,393 | 270,586 | 85.37% | 1,853,942 | 1,574,110 |
| 1121 Middle/Junior High Programs | 845,803 | 60,324 | 686,451 | 746,774 | 99,029 | 88.29% | 858,829 | 758,275 |
| 1122 Middle/Junior High School Extracurricular | 80,909 | 4,712 | 39,926 | 44,638 | 36,271 | 55.17% | 101,947 | 55,940 |
| 1131 High School Programs | 1,401,270 | 106,049 | 1,161,659 | 1,267,708 | 133,562 | 90.47% | 1,405,712 | 1,271,727 |
| 1132 High School Extracurricular | 287,001 | 42,881 | 142,720 | 185,601 | 101,400 | 64.67% | 395,609 | 255,837 |
| 1140 Pre-Kindergarten Program | 30,000 | - | - | - | 30,000 | 0.00% | 35,000 | - |
| 1210 Programs for the Talented and Gifted | 6,712 | 243 | 3,394 | 3,637 | 3,075 | 54.19% | 6,729 | 3,646 |
| 1220 Restrictive Pgms for Students w/Disabilities | 798,671 | 44,994 | 624,328 | 669,322 | 129,349 | 83.80% | 750,378 | 628,850 |
| 1223 Community Transition Centers | - | - | - | - | - | 0.00% | - | - |
| 1250 Programs for Students w/Severe Disabilities | 619,358 | 48,417 | 543,407 | 591,824 | 27,534 | 95.55% | 529,991 | 506,430 |
| 1271 Remediation | - | - | - | - | - | 0.00% | 21,304 | 166 |
| 1283 District Alternative Programs | 30,800 | 1,462 | 11,473 | 12,935 | 17,865 | 42.00% | 30,800 | 12,935 |
| 1288 Charter School Payments | 40,227,703 | 12,145,769 | 25,249,467 | 37,395,235 | 2,832,468 | 92.96% | 36,325,251 | 34,811,592 |
| 1291 English Second Language Programs | 1,601 | 1,584 | 16,860 | 18,444 | (16,843) | 1152.03% | 25,948 | 68 |
| **Total Instruction** | **$ 46,179,807** | **$ 12,598,080** | **$ 29,917,432** | **$ 42,515,512** | **$ 3,664,295** | | **$ 42,341,440** | **$ 42,615,689** |
| | | | | | | | | - |
| **Support Services** | | | | | | | | |
| 2112 Attendance Services | - | 0.00 | - | - | - | | - | 0.00 |
| 2120 Guidance Services | 41,096 | 2,896 | 32,767 | 35,663 | 5,433 | 86.78% | 252,735 | 34,810 |
| 2139 Health Servcies | 38,289 | 10,063 | 27,460 | 37,523 | 766 | 98.00% | 3,100 | 29,111 |
| 2143 Psychological Services | 1,500 | - | - | - | 1,500 | 0.00% | 1,500 | - |
| 2150 Speech Pathology and Audiology Services | 36,800 | 1,465 | - | 1,465 | 35,335 | 3.98% | 36,800 | - |
| 2190 Service Directions, Student Support Svcs | 203,659 | 43,811 | 156,560 | 200,371 | 3,288 | 98.39% | 201,460 | 190,231 |
| 2222 Library/Media Center | 70,940 | 70 | 36,498 | 36,568 | 34,372 | 51.55% | 111,191 | 57,316 |
| 2230 Assessment and Testing | 9,100 | 12,783 | - | 12,783 | (3,683) | 140.47% | 9,100 | 728 |
| 2240 Staff Development | 65,113 | 12,984 | 52,129 | 65,113 | - | 100.00% | 63,447 | 69,481 |
| 2310 Board of Education | 168,500 | 15,080 | 119,424 | 134,504 | 33,996 | 79.82% | 101,500 | 81,022 |
| 2321 Office of the Superintendent Services | 464,566 | 118,591 | 350,117 | 468,708 | (4,142) | 100.89% | 486,416 | 457,288 |
| 2410 Office of the Principal Services | 829,653 | 182,391 | 647,262 | 829,653 | - | 100.00% | 607,208 | 757,845 |
| 2520 Fiscal Services | 235,931 | 74,068 | 168,037 | 242,105 | (6,174) | 102.62% | 274,045 | 243,937 |
| 2542 Care and Upkeep of Building Services | 1,521,684 | 493,341 | 767,008 | 1,260,349 | 261,335 | 82.83% | 1,532,994 | 1,269,717 |
| 2543 Care and Upkeep of Grounds Services | 194,569 | 51,394 | 93,821 | 145,215 | 49,354 | 74.63% | 196,061 | 146,328 |
| 2544 Maintenance | | - | - | - | - | 0.00% | | - |
| 2550 Student Transportation Services | 854,002 | 63,539 | 612,551 | 676,090 | 177,912 | 0.00% | 805,845 | 637,966 |
| 2574 Printing, Publishing and Duplicating Services | 47,250 | 14,010 | 32,627 | 46,637 | 613 | 98.70% | 48,250 | 44,378 |
| 2649 Other Staff Services | 5,200 | 675 | 2,041 | 2,716 | 2,484 | 52.23% | 5,200 | 2,716 |
| 2669 Other Support Services-Central | 307,989 | 79,035 | 197,445 | 276,480 | 31,509 | 89.77% | 330,707 | 296,873 |
| **Total Support Services** | **$ 5,095,841** | **$ 1,176,194** | **$ 3,295,747** | **$ 4,471,941** | **$ 623,900** | | **$ 5,067,559** | **$ 4,319,746** |
| | | | | | | - | | |
| **Community Services** | | | | | | | | |
| 3100 Food Service | 5,565 | - | 4,026 | 4,026 | 1,539 | | 55,110 | 39,874 |
| **Total Community Services** | **$ 5,565** | **$ -** | **$ 4,026** | **$ 4,026** | **$ 1,539** | **$ -** | **$ 55,110** | **$ 39,874** |
| | | | | | | | | |
| **Other Requirements** | | | | | | | | |
| 4150 Building Acquisition, Construction, and Improvem | - | - | - | - | - | 0.00% | - | - |
| 5200 Transfers of Funds | 1,207,000 | - | 1,207,000 | 1,207,000 | - | 100.00% | 1,167,000 | **1,162,000** |
| 6000 Contingency | 3,428,242 | - | - | - | 3,428,242 | 100.00% | 1,281,338 | - |
| 7000 Unappropriated Ending Fund Balance | 1,500,000 | - | - | | 1,500,000 | 100.00% | 600,000 | - |
| **Total Other Requirements** | **$ 6,135,242** | **$ -** | **$ 1,207,000** | **$ 1,207,000** | **$ 4,928,242** | | **$ 3,048,338** | **$ 1,162,000** |
| **Total Requirements** | **$ 57,416,455** | **$ 13,774,274** | **$ 34,424,205** | **$ 48,198,479** | **$ 9,216,437** | | **$ 50,512,447** | **$ 48,137,309** |

**Santiam Canyon School District 129J**

Appropriations: Budget Vs. Actual

For the Fiscal Year 2025-2026

| General Fund (100) | Appropriations | YTD | Encumbrances | Totals | Resolutions | (Over)/Under Budget |
|---|---|---|---|---|---|---|
| 1000 Instruction | $ 46,179,807 | $ 12,598,080 | $ 31,388,114 | $ 43,986,194 | | $ 2,193,613 |
| 2000 Support Services | $ 5,095,841 | $ 1,176,194 | $ 2,666,967 | $ 3,843,161 | | $ 1,252,680 |
| 3000 Community Services | $ 5,562 | $ - | $ - | $ - | | $ 5,562 |
| 5200 Transfers | $ 1,207,000 | $ - | $ - | $ - | | $ 1,207,000 |
| 6000 Contingency | $ 3,428,242 | $ - | $ - | $ - | | $ 3,428,242 |
| Sub Total | **$ 55,916,452** | **$ 13,774,274** | **$ 34,055,081** | **$ 47,829,355** | | **$ 8,087,097** |
| **Special Revenue Funds** | | | | | | |
| 1000 Instruction | $ 3,240,661 | $ 139,687 | $ 1,431,296 | $ 1,570,984 | | $ 1,669,677 |
| 2000 Support Services | $ 1,163,667 | $ 96,588 | $ 432,061 | $ 528,648 | | $ 635,019 |
| 3000 Community Services | $ 797,916 | $ 78,737 | $ 364,424 | $ 443,160 | | $ 354,756 |
| 4000 Facility Acquisition | $ 300,000 | $ 177,382 | $ - | $ 177,382 | | $ 122,618 |
| 5100 Debt Service | $ 19,000 | $ 4,113 | $ 12,339 | $ 16,452 | | $ 2,548 |
| 6000 Contigency | $ 613,599 | $ - | $ - | $ - | | $ 613,599 |
| Sub Total | **$ 6,134,843** | **$ 496,506** | **$ 2,240,120** | **$ 2,736,626** | | **$ 3,398,217** |
| **PERS Bond Debt Service (302, 303, 304)** | | | | | | |
| 2000 Support Services | $ 20 | $ - | $ - | $ - | | $ 20 |
| 5100 Debt Service | $ 1,741,656 | $ - | $ - | $ - | | $ 1,741,656 |
| 6000 Contigency | $ 298,429 | $ - | $ - | $ - | | $ 298,429 |
| Sub Total | **$ 2,040,105** | **$ -** | **$ -** | **$ -** | | **$ 2,040,105** |
| **Facilities (400)** | | | | | | |
| 4000 Facilities Acquisition | $ 2,500,000 | $ - | $ - | $ - | | $ 2,500,000 |
| 6000 Contingency | $ 1,200,000 | $ - | $ - | $ - | | $ 1,200,000 |
| Sub Total | **$ 3,700,000** | **$ -** | **$ -** | **$ -** | | **$ 3,700,000** |
| **Total Appropriations** | $ 67,791,400 | $ 14,270,780 | $ 36,295,201 | $ 50,565,981 | | $ 17,225,419 |
| **Total Unappropriated** | $ 3,018,072 | $ - | $ - | $ - | | $ 3,018,072 |
| **TOTAL** | **$ 70,809,472** | **$ 14,270,780** | **$ 36,295,201** | **$ 50,565,981** | | **$ 20,243,491** |

# How to Read the Monthly Financial Statements

*Santiam Canyon School District | Board Reference Guide*

Each statement answers a different question about the district's financial position. Taken together, they help the Board monitor financial health, spending trends, and compliance with the adopted budget.

| Statement | Question It Answers | What the Board Should Watch |
|---|---|---|
| **Revenue Statement** | Are revenues coming in as expected? | Compare projected revenue with budget. Pay particular attention to large revenue sources, especially State School Fund revenue. A sustained shortfall can reduce the projected ending fund balance. |
| **Expenditure Statement** | Are expenditures tracking as expected? | Compare projected expenditures with budget. Watch salaries, benefits, and other large categories for trends above budget. Rising expenditures combined with falling revenues deserve particular attention. |
| **Appropriations Statement** | Is spending within the authority adopted by the Board? | Review the remaining appropriation and percentage used in each category. A category approaching its legal spending limit may require Board action even when the district has adequate cash or fund balance overall. |

## Key Indicators of Financial Health

**1. Estimated Ending Fund Balance:** This is the clearest overall indicator. The Board should focus on the trend over time rather than a single month. A continuing decline without a clear explanation warrants closer review.

**2. Projected Revenue vs. Budget:** Watch for projected revenues falling below budget, particularly in the district's largest revenue sources. Because State School Fund revenue is significant, even a relatively small percentage change can have a large dollar impact.

**3. Projected Expenditures vs. Budget:** Watch for expenditures trending above budget, especially salaries and benefits. The most concerning pattern is declining revenue at the same time expenditures are increasing.

**4. Remaining Appropriation:** The Board should also monitor whether any appropriation category is nearing its authorized spending limit. This is a budget-compliance issue and is different from overall financial health.

**A useful rule of thumb:** One unusual movement in a single month does not necessarily indicate financial trouble. The most important signal is a consistent negative trend - particularly when the projected ending fund balance is declining, revenues are coming in below expectations, and expenditures are trending above budget.

# Santiam Canyon School District 129J

Post Office Box 197
150 SW Evergreen St.
Mill City, Oregon 97360
Office (503) 897-2321

Krista Nieraeth, Superintendent
Nichole Cooper, Business Manager
Lindsay Sloan, AP & Payroll
Lisa Follis, District Secretary


## Santiam Canyon School District Board Report
## October 2026

### 1. STAND TOGETHER- We celebrate our strengths and differences

a. **STAFFING UPDATES**

- Current Job Openings:
  - Certified subs
  - Classified subs, especially custodial subs
  - Assistant Coaches
    - MS Boys Basketball x 2
    - HS Assistant Boys Basketball x 2
    - MS Assistant Wrestling Coach
    - HS Assistant Wrestling Coach

### 2. FIND YOUR PATH - We prepare for the future

#### a. PERFORMANCE GROWTH TARGETS (PGTs)

The district was required to submit PGT to ODE as a part of SB 141 (The Accountability Bill) for the next 4 years. Below are the targets that SCSD submitted to ODE and that were approved:

**4 Year Graduation Rate**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| Baseline | 93.2% | 93.2% | 93.5% | 94.0% | 94.5% | 95.0% |
| Focal Students | 93.1% | | 93.5% | 94.0% | 94.5% | 95.0% |

**5 Year Graduation Rate**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| Baseline | 94.4% | 94.4% | 94.5% | 95.0% | 95.5% | 96.0% |
| Focal Students | 90.0% | | 90.4% | 91.5% | 92.5% | 94.0% |

**Career & Workforce Readiness**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| Baseline | 134.6 | | 136.0 | 141.0 | 146.0 | 151.0 |
| Focal Students | 118.9 | | 121.0 | 129.0 | 136.0 | 146.0 |


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The following has been designated to coordinate compliance with these legal requirements and may be contacted at the Santiam Canyon School District office for additional information and/or compliance issues:, Title II Coordinator, Title IX Coordinator and Section 504 Coordinator: Director of Special Programs, 150 SW Evergreen St./PO Box 197, Mill City, OR 97360, (503) 897-2321

**K - 2 Attendance**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| **Baseline** | 54.9% | 64.3% | 66.0% | 68.0% | 71.0% | 73.0% |
| **Focal Students** | 50.0% | [redacted] | 62.0% | 65.0% | 69.0% | 72.0% |

**K - 12 Attendance**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| **Baseline** | 58.8% | 63.2% | 65.0% | 67.0% | 69.0% | 72.0% |
| **Focal Students** | 53.5% | [redacted] | 60.0% | 63.0% | 66.0% | 70.0% |

**3rd Grade ELA**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| **Baseline** | 33.3% | 36.7% | 39.0% | 42.0% | 45.0% | 49.0% |
| **Focal Students** | 28.0% | [redacted] | 35.0% | 39.0% | 43.0% | 48.0% |

**8th Grade Math**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| **Baseline** | 7.3% | 5.4% | 10.0% | 15.0% | 20.0% | 25.0% |
| **Focal Students** | 5.0% | [redacted] | 8.0% | 13.5% | 19.0% | 24.5% |

**9th Grade on Track**

| | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|---|---|---|---|---|---|---|
| **Baseline** | 94.1% | 91.7% | 95.0% | 96.0% | 97.0% | 98.0% |
| **Focal Students** | 90.0% | [redacted] | 91.0% | 93.0% | 95.0% | 97.0% |

Again, these are our baseline goals for each year. Each school will work to be above and beyond to achieve these baseline numbers.

## b. LBLESD REGIONAL SUPERINTENDENT MEETINGS AND PROFESSIONAL DEVELOPMENT

Each month, the LBLESD Superintendents, called the VSCA superintendent group, meet to discuss regional challenges, educational issues, ESD services, and state mandates, while exchanging ideas and learning from fellow district leaders. This year, our group has decided to focus on building capacity in our region's leaders by providing professional development opportunities.

On Friday, October 9, I attended an LBLESD leadership training based on Simon Sinek's book *The Infinite Game*. The training, which was open to all district and school administrative staff, focused on leading with a long-term mindset and building organizational capacity to support sustained improvement. I look forward to sharing key takeaways with our administrative team and exploring how these principles can support our district's goals and strengthen leadership across our schools.

## c. STRATEGIC PLAN UPDATE

The administrative team and I have met with Kyle Laier and his team to coordinate focus groups for our strategic planning process. His team will be in the district November 2 and 3 to meet with building staff, students, community partners and members, parents, and district office and administrative staff. Administrators have submitted names of individuals to invite, with each group consisting of approximately 10–12 participants. We are also reviewing the questions to ensure the discussions provide meaningful information to guide our plan.

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The following has been designated to coordinate compliance with these legal requirements and may be contacted at the Santiam Canyon School District office for additional information and/or compliance issues:, Title II Coordinator, Title IX Coordinator and Section 504 Coordinator: Director of Special Programs, 150 SW Evergreen St./PO Box 197, Mill City, OR 97360, (503) 897-2321

Following the focus groups, the team will launch a community survey to gather broader input on our community's vision for the district. Topics will include a Portrait of a Graduate, which are the skills and qualities we want students to have when they graduate, as well as teaching and learning, culture and belonging, engagement, and stewardship. We will encourage participation from across our school community to ensure a wide range of perspectives is represented.

We will also seek steering committee members who represent the different groups and communities within our district. The committee will review district performance and key data, consider feedback from the focus groups and survey, and work together to develop a proposed strategic plan for School Board consideration. Broad community involvement is essential to this process. We want people from all communities within our district to have a voice in shaping our priorities and the future of our schools.

## 3. NEVER GIVE UP- We push through to reach our goals

### a. FEDERAL PROGRAMS AUDIT

Our district is undergoing a Federal Programs Audit this year, covering our Title programs, McKinney-Vento, and Foster Care. Preparing for this review requires us to gather and organize documentation showing how we implement these programs and support the students they serve.

I met with Mrs. Hansen, Mrs. Rist, and Mrs. Cooper to review the required documentation, discuss responsibilities, and establish internal deadlines for submitting materials to me. These deadlines will give us time to carefully review the information, identify any missing materials or areas needing clarification, and compile our submission before it is due to the Oregon Department of Education (ODE) on November 2.

In addition to completing the required submission, this review provides an opportunity to assess our documentation practices and identify ways to strengthen the consistency and organization of our work. Our goal is to provide a complete, accurate submission that clearly reflects the services and support we provide to students and families under the guidelines of each grant

### b. DISTRICT AND SCHOOL FACILITIES

The water heater at SES is no longer providing adequate hot water and needs to be replaced. I learned two weeks ago that the cafeteria had very little hot water, and further inspection confirmed the issue affects the entire building. Three plumbers visited last week to assess the replacement and prepare quotes. Once we receive the quotes, we will review them and move forward with the work. Preliminary estimates indicate the project will cost at least $20,000. The existing water heater is original to the building, dating to 1987, and replacement is necessary to restore reliable hot water throughout the school.

Chuck Follis and I will coordinate field repairs and replanting beginning in the next couple of weeks. This work will include replanting the softball infield and planting the area behind the district office.

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Our custodial department is currently short one staff member. We continue to seek substitutes to support our custodial team and help keep our buildings safe and clean for students and staff. Thank you to our staff who are stepping up and in to help ensure that all of the duties and cleaning are done each night in all of our buildings.

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## District Enrollment

| Grade Level | 2026 - 2027 FY | | | | | | | | | | 2025-2026 SY | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 9/8 | 10/1 | 11/1 | 12/1 | 1/1 | 2/1 | 3/1 | 4/1 | 5/1 | 6/1 | 9/1 | 10/1 | 11/1 | 12/1 | 1/1 | 2/1 | 3/1 | 4/1 | 5/1 | 6/1 |
| KG | 94 | 94 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 82 | 100 | 103 | 106 | 107 | 108 | 108 | 108 | 105 | 102 |
| 1st | 100 | 101 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 116 | 121 | 123 | 125 | 127 | 133 | 134 | 136 | 139 | 136 |
| 2nd | 136 | 137 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 120 | 126 | 125 | 130 | 132 | 135 | 138 | 142 | 140 | 140 |
| 3rd | 137 | 135 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 146 | 151 | 153 | 154 | 152 | 157 | 158 | 161 | 167 | 170 |
| 4th | 160 | 164 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 185 | 189 | 191 | 199 | 202 | 197 | 200 | 200 | 205 | 206 |
| 5th | 191 | 190 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 164 | 170 | 177 | 191 | 194 | 197 | 206 | 214 | 214 | 213 |
| 6th | 214 | 217 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 199 | 203 | 214 | 220 | 225 | 236 | 241 | 255 | 259 | 258 |
| 7th | 266 | 270 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 267 | 266 | 284 | 303 | 307 | 316 | 336 | 350 | 368 | 377 |
| 8th | 333 | 336 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 328 | 266 | 355 | 359 | 361 | 366 | 388 | 397 | 408 | 413 |
| 9th | 275 | 278 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 290 | 336 | 313 | 323 | 328 | 349 | 372 | 394 | 411 | 421 |
| 10th | 357 | 367 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 333 | 305 | 371 | 379 | 383 | 403 | 413 | 434 | 443 | 435 |
| 11th | 394 | 395 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 380 | 389 | 406 | 419 | 422 | 437 | 450 | 454 | 472 | 474 |
| 12th | 425 | 426 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 383 | 389 | 392 | 398 | 399 | 376 | 376 | 374 | 374 | 370 |
| Total ADM | 3082 | 3110 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2993 | 3011 | 3207 | 3306 | 3339 | 3410 | 3520 | 3619 | 3705 | 3715 |

**ENROLLMENT**

| Grade | In building/ ORCA | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| As of 9/8/26 | In building | 40 | 28 | 35 | 40 | 35 | 53 | 47 | 50 | 51 | 46 | 45 | 35 | 46 | **551** |
| As of 9/8/26 | ORCA | 54 | 72 | 101 | 97 | 125 | 138 | 167 | 216 | 282 | 229 | 312 | 359 | 379 | **2531** |
| As of 9/8/26 | **TOTAL** | **94** | **100** | **136** | **137** | **160** | **191** | **214** | **266** | **333** | **275** | **357** | **394** | **425** | **3082** |
| | | | | | | | | | | | | | | | |
| As of 10/1/26 | In building | 40 | 29 | 35 | 40 | 36 | 54 | 49 | 50 | 51 | 46 | 44 | 34 | 45 | **553** |
| As of 10/1/26 | ORCA | 54 | 72 | 102 | 95 | 128 | 136 | 168 | 220 | 285 | 232 | 323 | 361 | 381 | **2557** |
| As of 10/1/26 | **TOTAL** | **94** | **101** | **137** | **135** | **164** | **190** | **217** | **270** | **336** | **278** | **367** | **395** | **426** | **3110** |
| | | | | | | | | | | | | | | | |
| As of 11/1/26 | In building | | | | | | | | | | | | | | **0** |
| As of 11/1/26 | ORCA | | | | | | | | | | | | | | **0** |
| As of 11/1/26 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 12/1/26 | In building | | | | | | | | | | | | | | **0** |
| As of 12/1/26 | ORCA | | | | | | | | | | | | | | **0** |
| As of 12/1/26 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 1/1/27 | In building | | | | | | | | | | | | | | **0** |
| As of 1/1/27 | ORCA | | | | | | | | | | | | | | **0** |
| As of 1/1/27 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 2/1/27 | In building | | | | | | | | | | | | | | **0** |
| As of 2/1/27 | ORCA | | | | | | | | | | | | | | **0** |
| As of 2/1/27 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 3/1/27 | In building | | | | | | | | | | | | | | **0** |
| As of 3/1/27 | ORCA | | | | | | | | | | | | | | **0** |
| As of 3/1/27 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 4/1/27 | In building | | | | | | | | | | | | | | **0** |
| As of 4/1/27 | ORCA | | | | | | | | | | | | | | **0** |
| As of 4/1/27 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 5/1/27 | In building | | | | | | | | | | | | | | **0** |
| As of 5/1/27 | ORCA | | | | | | | | | | | | | | **0** |
| As of 5/1/27 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 6/1/27 | In building | | | | | | | | | | | | | | **0** |
| As of 6/1/27 | ORCA | | | | | | | | | | | | | | **0** |
| As of 6/1/27 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |

**ENROLLMENT**

| Grade | In building/ ORCA | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| As of 9/1/25 | In building | 28 | 33 | 43 | 35 | 52 | 44 | 50 | 54 | 56 | 51 | 40 | 43 | 38 | **567** |
| As of 9/1/25 | ORCA | 54 | 83 | 77 | 111 | 133 | 120 | 149 | 213 | 272 | 239 | 293 | 337 | 345 | **2426** |
| As of 9/1/25 | **TOTAL** | **82** | **116** | **120** | **146** | **185** | **164** | **199** | **267** | **328** | **290** | **333** | **380** | **383** | **2993** |
| As of 10/1/25 | In building | 28 | 34 | 42 | 34 | 52 | 46 | 49 | 55 | 55 | 51 | 40 | 41 | 39 | **566** |
| As of 10/1/25 | ORCA | 72 | 87 | 84 | 117 | 137 | 124 | 154 | 211 | 281 | 254 | 321 | 348 | 350 | **2540** |
| As of 10/1/25 | **TOTAL** | **100** | **121** | **126** | **151** | **189** | **170** | **203** | **266** | **336** | **305** | **361** | **389** | **389** | **3106** |
| As of 11/1/25 | In building | 27 | 36 | 39 | 32 | 52 | 46 | 47 | 55 | 52 | 50 | 39 | 41 | 39 | **555** |
| As of 11/1/25 | ORCA | 76 | 87 | 86 | 121 | 139 | 131 | 167 | 229 | 303 | 263 | 332 | 365 | 353 | **2652** |
| As of 11/1/25 | **TOTAL** | **103** | **123** | **125** | **153** | **191** | **177** | **214** | **284** | **355** | **313** | **371** | **406** | **392** | **3207** |
| As of 12/1/25 | In building | 27 | 36 | 39 | 32 | 52 | 46 | 47 | 53 | 50 | 49 | 38 | 41 | 40 | **550** |
| As of 12/1/25 | ORCA | 79 | 89 | 91 | 122 | 147 | 145 | 173 | 250 | 309 | 274 | 341 | 378 | 358 | **2756** |
| As of 12/1/25 | **TOTAL** | **106** | **125** | **130** | **154** | **199** | **191** | **220** | **303** | **359** | **323** | **379** | **419** | **398** | **3306** |
| As of 1/1/26 | In building | 27 | 37 | 39 | 32 | 52 | 46 | 47 | 53 | 47 | 49 | 36 | 39 | 41 | **545** |
| As of 1/1/26 | ORCA | 80 | 90 | 93 | 120 | 150 | 148 | 178 | 254 | 314 | 279 | 347 | 383 | 358 | **2794** |
| As of 1/1/26 | **TOTAL** | **107** | **127** | **132** | **152** | **202** | **194** | **225** | **307** | **361** | **328** | **383** | **422** | **399** | **3339** |
| As of 2/1/26 | In building | 27 | 37 | 39 | 32 | 52 | 46 | 50 | 50 | 47 | 50 | 37 | 40 | 42 | **549** |
| As of 2/1/26 | ORCA | 81 | 96 | 96 | 125 | 145 | 151 | 186 | 266 | 319 | 299 | 366 | 397 | 334 | **2861** |
| As of 2/1/26 | **TOTAL** | **108** | **133** | **135** | **157** | **197** | **197** | **236** | **316** | **366** | **349** | **403** | **437** | **376** | **3410** |
| As of 3/1/26 | In building | 27 | 37 | 39 | 31 | 52 | 47 | 50 | 50 | 47 | 51 | 35 | 41 | 40 | **547** |
| As of 3/1/26 | ORCA | 81 | 97 | 99 | 127 | 148 | 159 | 191 | 286 | 341 | 321 | 378 | 409 | 336 | **2973** |
| As of 3/1/26 | **TOTAL** | **108** | **134** | **138** | **158** | **200** | **206** | **241** | **336** | **388** | **372** | **413** | **450** | **376** | **3520** |
| As of 4/1/26 | In building | 27 | 37 | 38 | 30 | 51 | 47 | 50 | 48 | 45 | 51 | 36 | 41 | 40 | **541** |
| As of 4/1/26 | ORCA | 81 | 99 | 104 | 131 | 149 | 167 | 205 | 302 | 352 | 343 | 398 | 413 | 334 | **3078** |
| As of 4/1/26 | **TOTAL** | **108** | **136** | **142** | **161** | **200** | **214** | **255** | **350** | **397** | **394** | **434** | **454** | **374** | **3619** |
| As of 5/1/26 | In building | 27 | 37 | 38 | 31 | 52 | 46 | 50 | 49 | 44 | 49 | 36 | 41 | 41 | **541** |
| As of 5/1/26 | ORCA | 78 | 102 | 102 | 136 | 153 | 168 | 209 | 319 | 364 | 362 | 407 | 431 | 333 | **3164** |
| As of 5/1/26 | **TOTAL** | **105** | **139** | **140** | **167** | **205** | **214** | **259** | **368** | **408** | **411** | **443** | **472** | **374** | **3705** |
| As of 6/1/26 | In building | 27 | 37 | 37 | 32 | 52 | 45 | 50 | 49 | 42 | 49 | 36 | 41 | 39 | **536** |
| As of 6/1/26 | ORCA | 75 | 99 | 103 | 138 | 154 | 168 | 208 | 328 | 371 | 372 | 399 | 433 | 331 | **3179** |
| As of 6/1/26 | **TOTAL** | **102** | **136** | **140** | **170** | **206** | **213** | **258** | **377** | **413** | **421** | **435** | **474** | **370** | **3715** |

# REGULAR ATTENDERS - 2026-27

## >90% Positive Attendance

| Grade Level | Enrollment # 1-Oct | | Enrollment # 1-Nov | | Enrollment # 1-Dec | | Enrollment # 1-Jan | | Enrollment # 1-Feb | | Enrollment # 1-Mar | | Enrollment # 1-Apr | | Enrollment # 1-May | | Enrollment # 1-Jun | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| KG | 40 | 60.0% | | | | | | | | | | | | | | | | |
| 1st | 29 | 79.3% | | | | | | | | | | | | | | | | |
| 2nd | 35 | 80.0% | | | | | | | | | | | | | | | | |
| 3rd | 40 | 87.5% | | | | | | | | | | | | | | | | |
| 4th | 36 | 83.3% | | | | | | | | | | | | | | | | |
| 5th | 55 | 81.2% | | | | | | | | | | | | | | | | |
| 6th | 49 | 75.5% | | | | | | | | | | | | | | | | |
| 7th | 50 | 66.0% | | | | | | | | | | | | | | | | |
| 8th | 51 | 72.6% | | | | | | | | | | | | | | | | |
| 9th | 46 | 69.6% | | | | | | | | | | | | | | | | |
| 10th | 43 | 83.7% | | | | | | | | | | | | | | | | |
| 11th | 34 | 88.5% | | | | | | | | | | | | | | | | |
| 12th | 45 | 66.7% | | | | | | | | | | | | | | | | |
| **Schoolwide** | **553** | **76.5%** | **0** | **#DIV/0!** | **0** | **#DIV/0** | **0** | **#DIV/0!** | **0** | **#DIV/0!** | **0** | **#DIV/0!** | **0** | **#DIV/0!** | **0** | **#DIV/0!** | **0** | **#DIV/0!** |

# Sick Leave (GCBD/GDBD) and Sick Time (GCBDD/GDBDD)

Oregon School District application

Lindsay Sloan and Krista Nieraeth
October 21, 2026

# Two statutes, overlapping requirements

| | Sick leave | Sick time |
|---|---|---|
| Statute | ORS 332.507 | ORS 653.601–653.661 |
| Purpose | Paid leave benefit for school district and ESD employees | Minimum rights and protections for Oregon workers |
| Amount | At least 10 paid days per school year or 1 day per month employed, whichever is greater | Generally 1 hour per 30 hours worked, up to 40 hours annually, or 40 hours provided upfront |

**School employee sick leave accumulates without a cap on days.**

Sources: ORS 332.507 and ORS 653.606

# Qualifying uses of sick time

| | |
|---|---|
| **Health needs** | Employee or covered family member illness, injury, treatment, or preventive care. |
| **Family needs** | Certain parental leave and bereavement needs. |
| **Safety and emergencies** | Qualifying safe leave and public health emergencies. |
| **Blood donation** | Qualifying voluntary blood donation (*NEW). |

Sources: ORS 653.616 and BOLI sick time guidance

# One leave balance can satisfy both laws

## Example: 10 sick leave days at 8 hours per day

| Leave balance | Hours |
|---|---|
| Beginning annual benefit | 80 |
| One qualifying day of absence | −8 |
| Remaining leave balance | 72 |

**The required 40 hours of sick time can be included within the 80 hours.**

Assumption: a district policy that meets all sick time requirements. Source: ORS 653.611

# Sick time protections

| | |
|---|---|
| **Protected absences** | The district cannot discipline employees for qualifying sick time use. |
| **Notice and verification** | Statutory rules limit notice requirements and medical verification. |
| **Use and reporting** | Sick time generally allows hourly use. Employees receive balance notices at least quarterly. |

**Other leave laws may provide additional rights after sick time is exhausted.**

Sources: ORS 653.621–653.641 and BOLI guidance

# Implications for district policy

| | |
|---|---|
| **Leave benefit** | The district must preserve the school employee sick leave benefit and accumulation requirements. |
| **Policy alignment** | An existing bank can meet both laws when its qualifying uses and procedures meet sick time requirements. |
| **Beyond 40 hours** | District policies, bargaining agreements, and other leave laws govern additional rights. |

Sources: ORS 332.507, ORS 653.611, and BOLI guidance

# Statutes and guidance

## School employee sick leave

ORS 332.507

## Oregon sick time

ORS 653.601–653.661

## State guidance

BOLI: Sick time

Reviewed October 11, 2026

# Santiam Canyon School District 129

Code: GCBD/GDBD
Adopted: 9/02/99
Readopted: 6/10/15; 5/13/26
Orig. Code: GCBD/GDBD

## Sick Leave - Personal Illness and Injury Leave

Sick leave is allowed to accrue at the rate of 10 days each school year for each "school employee[1]" for personal illness or injury or one day per month employed, whichever is greater, as provided by Oregon law. Twelve-month employees will accrue 1 day per month or 12 days each year.

In accordance with state law, this leave will accumulate without limit.

Sick leave in excess of five consecutive work days shall require a certificate from the employee's attending physician, naturopathic physician or practitioner that the employee's illness or injury prevents the employee from working. Any employee refusing to submit to such an examination or to provide other evidence as required by the district, shall be subject to appropriate disciplinary action, up to and including dismissal.

Other paid and unpaid leaves will be determined by the district's collective bargaining agreements.

All medical information will be kept confidential, in a separate file from personnel records, and released only in accordance with the requirements of the Americans with Disabilities Act or other applicable law.

Sickness or other unavoidable circumstances that prevent a teacher from teaching 20 school days immediately following exhaustion of sick leave accumulated under Oregon law, the Board will place the teacher on unpaid leave for the remainder of the regular school year or until the teacher's disability is removed and they are able to return to work. If the teacher is still unable to return to work the following August 1, the Board may terminate the teacher's employment, subject to state and federal laws regarding family and medical leave.

All district-paid employee benefits, such as health and dental insurance, will cease on the last day of the month in which employment is terminated, or the staff member is placed on unpaid leave, unless the unpaid leave is in conjunction with state or federal law. The staff member will be informed of their rights to remain a part of the district benefit plan at personal expense.

END OF POLICY

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[1] "School employee" includes all employees of the district.

**Legal Reference(s):**

ORS 332.507
ORS 342.545
ORS 342.610
ORS 659A.043
ORS 659A.046
OAR 581-022-2405

Knapp v. North Bend, 304 Or. 34 (1987).
Consolidated Omnibus Budget Reconciliation Act of 1985, 29 U.S.C. §§ 1161-1169 (2024).
Employee Retirement Income Security Act of 1974, 29 U.S.C. §§ 1001-1461 (2024).
Americans with Disabilities Act/Americans with Disabilities Act Amendments Act, 42 U.S.C. §§ 12101-12213 (2024); 29 C.F.R. Part 1630 (2025); 28 C.F.R. Part 35 (2025).
Family and Medical Leave Act, 29 U.S.C. §§ 2601-2654 (2024); Family and Medical Leave Act, 29 C.F.R. Part 825 (2025).

**Cross Reference(s):**

ACA - Americans with Disabilities Act
GBDA - Mother Friendly Workplace
GBEDA - Drug and Alcohol Testing - Transportation Personnel

Santiam Canyon
School District 129

Code: **GCBDD/GDBDD**
Adopted: 10/12/16

# Sick Time

"Employee" means an individual who is employed by the district and who is paid on an hourly, stipend or salary basis, and for whom withholding is required under Oregon Revised Statute (ORS) 316.162-316.221. The definition does not include volunteers or independent contractors.

Employees qualify to begin earning and accruing sick time on the first day of employment with the district.

A district shall allow an eligible employee to access up to 40 hours of paid sick time per year. Paid sick time shall accrue at the rate of at least one hour of paid sick time for every 30 hours or 1-1/3 hours for every 40 hours the employee works for full-time represented classified employees, substitutes and other part-time employees working less than 4.5 hours per day. Paid sick time of 40 hours shall be front-loaded to all full-time represented licensed employees and full-time nonrepresented employees, as well as coaches, at the beginning of the fiscal year. Paid sick time of 40 hours shall be front-loaded to all part-time employees working 4.5 hours or more per day.

The employee may carry up to 40 hours of unused sick time from one year to the subsequent year. An employee is limited to using no more than 40 hours of sick time in a year.

Sick time shall be taken in hourly increments, except for substitutes, who must take sick time in 4-hour increments, and may be used for the employee's or a family member's[1] mental or physical illness, injury or health condition, need for medical diagnosis, care or treatment of a mental or physical illness, injury or health condition or need for preventive care, or for reasons consistent with the Family Medical Leave Act (FMLA) or OFLA. Sick time may also be used in the event of a public health emergency.

The use of sick time may not lead to, or result in, an adverse employment action against the employee.

The district reserves the right to require proof of personal illness or injury from an employee, including a medical examination by a physician chosen and paid for by the district. An employee refusing to submit to such an examination or to provide other evidence as required by the district, shall be subject to appropriate disciplinary action, up to and including dismissal.

When the reason for sick time is consistent with FMLA/OFLA leave, the sick time and the FMLA/OFLA leave may run concurrently.

When the reason for sick time is consistent with ORS 332.507, the sick time and leave pursuant to ORS 332.507 may run concurrently.

[1]"Family member" is defined by the Oregon Family Leave Act (OFLA).

If the reason for sick time is a foreseeable absence, the district may require the employee to provide advance notice of their intention to use sick time or as soon as practicable. When the employee uses sick time for a foreseeable absence, the employee shall take reasonable effort to schedule the sick time in a manner that does not unduly disrupt the operations of the district (e.g., grading deadlines, inservice training, mandatory meetings).

If the reason for sick time is unforeseeable, such as an emergency, accident or sudden illness, the employee shall notify the district as soon as practicable.

The district shall establish a standard process to track the eligibility for sick time of a substitute.

END OF POLICY

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**Legal Reference(s):**

ORS 332.507
ORS 342.545
ORS 342.610
ORS 659A.150 to -659A.186
SB 454 (2015)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213; 29 C.F.R. Part 1630 (2006); 28 C.F.R. Part 35 (2006).
Family and Medical Leave Act of 1993, 29 U.S.C. §§ 2601-2654 (2006); Family and Medical Leave Act of 1993, 29 C.F.R. Part 825 (2006).
Americans with Disabilities Act Amendments Act of 2008.

**Cross Reference(s):**

ACA - Americans with Disabilities Act
GBDA - Mother Friendly Workplace
GCBDA/GDBDA - Family Medical Leave
GCBD/GDBD - Leaves and Absences

# STAR Math 26-27 Benchmark Assessment

# SJSHS

| STAR Math %tile | 0-9 | 10-24 | 25-39 | 40-100 |
|---|---|---|---|---|

## Whole School

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 11.8% | | | |
| Some Risk | 16.7% | | | |
| Low Risk | 18.8% | | | |
| No Risk | 52.7% | | | |

## 7th Grade

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 18.4% | | | |
| Some Risk | 16.3% | | | |
| Low Risk | 16.3% | | | |
| No Risk | 49.0% | | | |

## 6th Grade

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 11.1% | | | |
| Some Risk | 22.2% | | | |
| Low Risk | 28.9% | | | |
| No Risk | 37.8% | | | |

## 8th Grade

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 6.0% | | | |
| Some Risk | 12.0% | | | |
| Low Risk | 12.0% | | | |
| No Risk | 70.0% | | | |

# STAR Reading 26-27 Benchmark Assessment

# SJSHS

| STAR Reading %tile | 0-9 | 10-24 | 25-39 | 40-100 |
|---|---|---|---|---|

## Whole School

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 15.8% | | | |
| Some Risk | 20.9% | | | |
| Low Risk | 15.1% | | | |
| No Risk | 48.2% | | | |

## 6th Grade

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 11.1% | | | |
| Some Risk | 22.2% | | | |
| Low Risk | 17.8% | | | |
| No Risk | 48.9% | | | |

## 7th Grade

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 28.3% | | | |
| Some Risk | 23.9% | | | |
| Low Risk | 13.0% | | | |
| No Risk | 34.8% | | | |

## 8th Grade

| Risk level | Fall 2026 | Winter 2027 | Spring 2027 | Change |
|---|---|---|---|---|
| High Risk | 8.3% | | | |
| Some Risk | 16.7% | | | |
| Low Risk | 14.6% | | | |
| No Risk | 60.4% | | | |

**SES Data – 26 - 27**

**Reading**

| Risk level | Fall 2025 | Fall 2026 | Change |
|---|---|---|---|
| High Risk | 3.9% | 8.3% | 4.4 |
| Some Risk | 19.6% | 22.3% | 2.7 |
| Low Risk | 17% | 13.4% | -3.6 |
| No Risk | 59.5% | 56% | -3.5 |

**Early Literacy**

| Risk level | Fall 2025 | Fall 2026 | Change |
|---|---|---|---|
| High Risk | 9% | 11.5% | 2.5 |
| Some Risk | 23.1% | 20.5% | -2.6 |
| Low Risk | 17.9% | 20.5% | 2.6 |
| No Risk | 50% | 47.4% | -2.6 |

**Math**

| Risk level | Fall 2025 | Fall 2026 | Change |
|---|---|---|---|
| High Risk | 4.8% | 5.2% | .4 |
| Some Risk | 16.6% | 13.3% | -3.3 |
| Low Risk | 19.7% | 16.3% | -3.4 |
| No Risk | 58.9% | 65.2% | 6.3 |

# Division 22 Standards Assurances for the 2025-26 School Year

Krista Nieraeth, M.Ed.
Superintendent

October 21, 2026

# Overview

# What are the Division 22 Standards?




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

  Example: 581 - 022 - 0102 Definitions
  Chp. 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 60 rules.

*Priorities for*
**STUDENT SUCCESS**

1. High-quality learning experiences
2. Aligned & focused educational systems
3. Engaged partners & communities
4. Safe & inclusive schools
5. Committed & supported staff



Oregon's Reimagined Accountability Framework (pg. 3):

# Snapshot: Division 22 Rules



# What are the requirements for each of the rules?

Consult the following resources for information:

| Resource | Description |
|---|---|
| ODE's Rules at a Glance Summary | Provides a high-level summary of each rule |
| Secretary of State's Oregon Administrative Rules Database | Consult the text of the OAR for all of the specific details |
| ODE's Division 22 Standards Newsletter | 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 "The 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 2025-26 School Year

# Division 22 Waivers for 2025-26

- 581-022-2115(3) Assessment of Essential Skills:
  - **Essential Skills Graduation Requirements** are waived for students graduating through the end of the 2027-28 school year.
  - Note: Local Performance Assessment requirement in Section (2) remains in effect.
- OAR 581-022-2120 Essential Skill Assessments for English Language Learners
  - This related policy requirement has also been waived through the end of the 2027-28 SY.



Rule Now in Effect for the 2025-26 SY



# Educational Equity Advisory Committees

- Advisory Role: Committees now advise the superintendent, not the school board.
- Public Meeting Law: Committees are no longer subject to public meeting requirements.
- Membership Selection: The superintendent now selects committee members.

# Rule Revision in Effect for the 2025-26 SY



## Administration of State Assessments

- Added SEED Survey as required OSAS component
- Added mention of ELPA Screener as required OSAS component (not a new requirement, just making the rule more complete)
- Added clarification that districts must abide by ODE decisions regarding student test records

# New TAG Requirements



## Identification of Academically Talented and Intellectually Gifted Students

New for 2025-26:

- Any person may recommend a student they know to be screened throughout the school year.
- A definition of “screen” has also been added to the rule.

# Preserving Student Instructional Time



## OAR 581-022-2323 Implements Executive Order 26-06

- Districts that reduced student instructional time levels during the 2025-2026 or 2026-2027 school years must submit to ODE either:
  - a plan to restore student instructional time by the 2027-2028 school year or
  - evidence of the district school board approving the decision to not restore student instructional time and a public posting of the justification for that decision
- A district may not reduce student instructional time during the 2026-2027 school year.

# District Report on Compliance with Division 22 Standards

- Santiam Canyon is in compliance with all Division 22 standards with the exception of 581-002-2223 – Healthy and Safe Schools Plan.
  - This OAR requires the sharing of results of any required testing, which includes Lead in Water.
  - The District is out of compliance, as it did not do the initial testing of all drinkable and cookable water sources by July 1, 2020, as SB 1062 required.

# Corrective Action Implemented

- As of 10/2/26, the district has completed initial lead testing of all drinkable and cookable water sources and has submitted those samples to a local lab for testing and results.  Results will be posted on the district's website once all tests have been completed.
- This will put the district back into compliance for OAR 581-002-2223.

# Looking Ahead: Compliance for the 2026-27 SY

# New Requirements



## Required Instructional Time

- EO 26-06 and OAR 581-022-2320 require districts to annually report the student instructional time provided during the previous school year.
- For 2025-26 this will be done through the Division 22 Assurance process.
- As a result of EO 26-06, **the State Board of Education may not grant waivers for the instructional time requirement** set forth in OAR 581-022-2320, except in the case of declared national or state disaster or public health emergency.

# Revised Graduation Requirements for 2027



## Diploma and Modified Diploma Requirements

Credit requirements for students graduating on or after January 1, 2027 include 0.5 credit in Personal Financial Education and 0.5 credit in Higher Education & Career Path Skills.

# Revised Safety Requirements



## Emergency Plans and Safety Programs

- Plans and drills required for procedures related to: Evacuate (fire drill), Lockdown, Secure, Shelter, Hold, and Earthquakes.
- Tsunami plans and drills required for schools in the inundation zone.
- School boards must consider an emergency alert system if not in use.

# Revised Evaluation Requirements




## Educational Leadership – Administrator Standards

Administrator standards have been updated to the Professional Standards for Educational Leadership, which are currently used by TSPC for administrator licensure. These standards have more specific, detailed language and a greater focus on key issues such as equity, talent development, leadership capacity, and instructional leadership.

**Districts must align administrator evaluations to the updated standards by September 30, 2027.**

2026 OSBA BYLAWS BALLOT MEASURE

# OSBA Governance Changes

A summary for member boards: what would change, why, and what comes next

**To OSBA member boards,**

In 2026, OSBA's Board Governance Committee led a review of how the association is governed. On September 19, 2026, the OSBA Board of Directors adopted a resolution to amend the OSBA Bylaws and referred it to you, our members, for a vote during the 2026 election cycle.

This summary explains what the amendments would change, why, and what would stay the same. The bylaws set the overall framework. Many supporting details would be worked out afterward through Board policy and operating procedures, with input from the people most affected. Each section lists those open details and who will decide them.

Each member board will vote on the amended bylaws as a single ballot measure. Approval requires two-thirds of returned ballots. The full text of the Board's resolution is included in the voting packet.

We encourage every member board to read the "At a Glance" page and discuss it before voting.

**OSBA Board Governance Committee**

# At a Glance

The ballot measure contains four central changes, plus several smaller technical updates described later in this summary.

### THE FOUR CENTRAL CHANGES

*1*

**Ex-officio advisor seats.** Would end the standing list of named,non-voting advisors on the Board. The Board could still invite advisors when needed.

*2*

**Caucuses.** Caucuses would advise the executive director instead of the Board. The executive director would establish caucuses using criteria the Board sets in policy. Today, adding or removing a caucus requires a member vote to amend the bylaws.

*3*

**Caucus Council.** Would create a new Caucus Council, with one representative from each caucus, to advise the Board. The two caucus seats on the Board would become two seats filled by the Board on the Council's recommendation. The Council would also have new pathways to additional leadership.

*4*

**Legislative Policy Committee (LPC).** Board members would choose whether to serve on the LPC instead of being required to. The Caucus Council would also have LPC seats (number determined in policy).

### WHAT IS NOT CHANGING

**Board size.** The Board would keep up to 25 voting directors: up to 22 elected by region, plus 2 recommended by the Caucus Council.

**Caucus seats during the transition.** The two established caucuses would keep their Board seats until the new Caucus Council directors are appointed, or until the end of 2027, whichever comes first.

**Caucus voice in governance.** Caucuses would continue to have a path to leadership through the two Caucus Council seats and committee seats.

**Board oversight of funding.** The Board would continue to set caucus funding through the annual budget.

## Why these changes

Members told us that the Board's size, unclear roles, and confusion between governance and advocacy are the biggest barriers to an effective Board. These changes are a first, measured step. The Governance Committee will review their impact after one year before recommending anything further, including any change to Board size.

# Background

## How the review was done

As part of OSBA's regular governance review cycle, the Board engaged Coraggio Group in 2026 to assess OSBA's governance structure. The assessment gathered input from:

188 survey respondents, 12 stakeholder interviews, and 7 focus groups, representing the Board, staff, member districts of every size, the caucuses, and the PRIDE Advisory Committee

A review of school board association bylaws in more than 30 states

Coraggio Group reported its findings in June 2026. The Governance Committee then held a design retreat on August 3, recommended bylaws amendments on August 24, and the Board adopted and took action to refer them to the membership on September 19.

## Guiding principles

Four principles, set at the start of the review, shaped which changes moved forward:

### Efficiency

Design structures that make purposeful use of staff resources and board member time. Every committee, caucus, and process should add clear value.

### Effectiveness

Ensure governance structures enable the board to fulfill its core responsibilities: strategic oversight, policy governance, fiduciary accountability, and organizational leadership.

### Engagement

Ensure boards as entities have genuine opportunities to participate and inform decisions without creating administrative burden or unnecessary complexity.

### Representation

Balance representation between boards as fundamental units and districts serving larger student populations, ensuring all member voices carry appropriate weight while maintaining geographic practicality.

## What we heard

- Board size was named by every member group as the greatest opportunity to improve efficiency, and **69%** of Board and staff respondents named it as a structure that should be re-evaluated.
- Confusion between governance and advocacy was the most-cited barrier to Board effectiveness (**29%** of all respondents), followed by unclear roles (**26%**).
- Board and staff rated the Board's understanding of OSBA's Board work **2.6 out of 5**, though they rated orientation **3.9**.
- The non-voting ex-officio seats were rated the least active and least impactful Board roles. **39%** of Board and staff respondents flagged them.
- Both caucuses and the advisory committee received below-target effectiveness ratings. Members of each group flagged their own group's structure for re-evaluation: **69%** of advisory committee respondents, **63%** of Rural Caucus respondents, and **56%** of Members of Color Caucus respondents flagged their own body's structure for re-evaluation.

# The Four Central Changes

## 1. Ex-officio advisor seats

**TODAY**

Up to 25 voting directors: 22 elected by region, plus one from the Oregon School Board Members of Color Caucus and one from the Oregon Rural School Board Members Caucus. The bylaws cap the Board at 25 voting persons (Sec. 3.3).

Five named, non-voting ex-officio advisors: an NSBA director elected from Oregon; the executive director of the Coalition of Oregon School Administrators; the chair-elect of the Oregon Association of Education Service Districts; the board president of the Oregon Community College Association; and the chair of the State Board of Education.

**WHAT WOULD CHANGE**

The named list of ex-officio advisors would be removed.

The Board could designate non-voting ex-officio advisors as needed (Sec. 3.5.4).

**WHY**

*The ex-officio role and its relationship to the Board were never clearly defined. These seats were rated the least active and least impactful Board roles, and 39% of Board and staff respondents flagged them. Peer state associations seat 14 to 19 voting directors; OSBA seats up to 25.*

# 2. Caucuses would advise the executive director

### TODAY

Two caucuses are named in the bylaws: the Oregon School Board Members of Color Caucus and the Oregon Rural School Board Members Caucus.

Each holds a guaranteed Board seat and LPC seat and advises the Board directly.

A caucus can be created or eliminated only by a bylaws amendment approved by members.

The PRIDE Advisory Committee is not named in the bylaws. It advises the Board and has no guaranteed Board or LPC seat.

### WHAT WOULD CHANGE

The executive director would establish caucuses that support OSBA's vision, mission, and goals, following criteria the Board adopts in policy.

Caucuses would advise the executive director instead of the Board. The Caucuses would no longer be approved by the membership.

The two current caucuses would no longer be named in the bylaws. The expectation is that they would be re-established under the new framework, but that would happen through policy, not through this ballot measure.

The PRIDE Advisory Committee is not addressed in the bylaws, so this measure has no immediate effect on its status. Any change would come through Board policy.

Staff support would be defined in caucus operating procedures and an executive director framework rather than in the bylaws.

The Board would continue to evaluate the executive director, providing accountability for groups that report to that position.

### WHY

*Today the two caucuses and the advisory committee have different budgets, seats, authority, and resources. A single framework would give every caucus the same pathway and the same rules.*

*Reporting to the executive director would connect caucuses more directly to OSBA staff and day-to-day operations, providing greater flexibility in how they conduct their work while supporting effective coordination and implementation.*

### STILL TO BE DECIDED

- Criteria and safeguards for establishing a caucus, grounds for dissolving one, and an appeal to the Board if a caucus request is denied or is dissolved (OSBA Policy Committee)
- How caucus leaders are selected, how long they serve, and how leadership rotates (caucus operating procedures)
- What staff provide to caucuses and how staff take part in their meetings (caucus operating procedures and executive director framework)
- How Oregon public meetings law applies to caucus meetings (OSBA Policy Committee, with legal review)

# 3. A new Caucus Council, and caucus seats on the Board

**TODAY**

Each of the two caucuses designates one voting director to the Board and Legislative Policy Committee.

Each caucus manages its own budget.

Adding a caucus adds a seat on both the Board and the LPC.

**WHAT WOULD CHANGE**

A new Caucus Council, advisory to the Board, composed of one Board-approved representative from each caucus, (Sec. 4.4.4).

The Council would recommend two people for the Board to appoint as full voting directors (Secs. 3.5, 3.5.3). These replace the two current caucus seats.

The Council would have the option to recommend a Finance Committee member, LPC members, and members to other Board committees. Recommendations would be subject to the approval of the Board.

The Council would adopt operating procedures (Sec. 4.4.2), keep minutes, report at Board meetings, follow public meetings law (Sec. 4.5), and file a year-end report (Sec. 4.4.6).

The Board would set the Council's budget (Sec. 4.4.5), as it sets caucus budgets today.

New caucuses would join the Council without adding Board seats.

## Filling seats and the transition

**Officer overlap.** If the president or immediate past president is a Caucus Council director, the Council would select an additional director for that term (Sec. 3.5.3).

**Start date.** The new structure would take effect July 1, 2027, to allow time to develop the supporting policies and procedures

**Transition.** The two current caucus directors would keep their seats until the Board appoints the two Council directors, or until the end of 2027, whichever comes first.

**WHY**

*One Council would give every caucus, current and future, the same pathways to leadership. The Council structure allows new caucuses to be added without expanding the Board or revising the bylaws each time a caucus is created. This provides greater flexibility while addressing member concerns about Board size.*

**STILL TO BE DECIDED**

- The Council's operating procedures, including how it selects candidates for its two Board seats (OSBA Policy Committee)
- How Caucus Council budget is distributed to individual Caucuses (Caucus Council)

# 4. Legislative Policy Committee (LPC)

### TODAY

Members: all voting Board members, elected regional representatives (Sec. 4.1.3(c)–(e)), the President as an ex-officio voting member, and one designee from each caucus.

Board policy (Policy 2100) requires every director to serve on the LPC.

The bylaws set two-year terms for LPC seats, with terms starting in January 1 of even-numbered years.

### WHAT WOULD CHANGE

Members: Board members who choose to serve; the president (ex officio, voting); all Executive Committee members (required to serve); elected regional representatives; and members recommended by the Caucus Council (Sec. 4.1.3(b)).

Two-year terms starting January 1 of even-numbered years, with members being limited to up to five consecutive terms, then eligible again after a two-year break (Sec. 4.1.3(f)).

### WHY

*Requiring every director to serve on the LPC blurred the line between governance and advocacy, the barrier to effectiveness respondents named most often. Voluntary service would place directors on the LPC who are ready and have capacity for the advocacy role. Term limits would create predictable rotation and new leadership pathways. Seating Council designees would keep caucus representation on the LPC through one consistent process.*

### STILL TO BE DECIDED

- How directors indicate interest in LPC service, and how seats are filled (OSBA Policy Committee)
- How many Caucus Council designees serve on the LPC (Board and Caucus Council)
- How current members, and directors who join mid-cycle, move into the new term cycle (OSBA Policy Committee)

# Other Changes on the Same Ballot

These technical updates are part of the same ballot measure. Items already covered above are noted, not repeated.

| CHANGE | WHAT IT DOES |
|---|---|
| **Resolution deadline (2.5)** | Moves the deadline for submitting resolutions to the Board from September 30 to September 15. |
| **Region declaration (2.6.2)** | Clarifies that if a member has a main administrative office in more than one region, the member must declare which region it intends to vote and shall only vote in that region. |
| **Regional review (2.7)** | Formal review of OSBA's regions would happen at least every five years instead of every three. |
| **Annual meeting (2.8)** | Keeps the annual members' meeting but drops the requirement that it be in person in November. OSBA would still report on its activities and finances at least once a year. |
| **Quorum and approval (2.13, 2.14)** | Blank ballots and abstentions would count toward quorum but would not count as "no" votes. |
| **Board vacancies (3.6)** | Clarifies that the Board would be able to fill any vacant director seat by appointment, except an extra seat created under Sec. 3.5.1(e) when the president or immediate past president is no longer from that region. |
| **Contiguous regions (3.6)** | Ends the option of appointing a director from a neighboring region. Directors would have to come from the region they represent. |
| **Finance Committee term limits (4.1.2)** | Members starting on or after January 1, 2027, would be able to serve five consecutive two-year terms, then return after a two-year break. Current members would not be affected. |
| **Officer reelection (5.4)** | Clarifies that an officer (other than the past president) whose Board seat is up for election would have to be reelected by their region to remain an officer. |
| **Also on the ballot** | Caucus director transition (3.5.3) and Finance Committee Council designee (4.1.2): see Change 3. LPC terms (4.1.3(f)): see Change 4. |

# Improvements Already Underway (No Vote Needed)

These improvements fall within the Board's and staff's existing authority. Several are already in progress.

| AREA | WHAT IS CHANGING |
|---|---|
| **Onboarding** | Written role descriptions at recruitment, mentoring for new directors, and a check-in at six to eight months. |
| **Board and LPC expectations** | Written attendance and engagement expectations and a way to track them, applying equally to regional and Caucus Council directors. |
| **Regional director role** | Clarifies that regional directors are a point of contact for member boards, not their delegates, and owe their primary duty to the association as a whole as its fiduciaries. |
| **Governance training** | Ongoing training on Board, staff, and officer roles, fiduciary duty, and officer eligibility. |
| **Member communication** | Clear ownership of member communication, a regular governance digest and legislative updates, and roadshows redesigned for two-way dialogue. |
| **Meetings** | In-person sessions for complex decisions and more emphasis on preparation before meetings. |

# Timeline

| | |
|---|---|
| **June 2026** | Coraggio Group delivered governance review report |
| **August 3, 2026** | Governance Committee design retreat |
| **August 24, 2026** | Governance Committee recommended bylaws amendments |
| **September 19, 2026** | Board adopted resolution and referred it to members |
| **2026 election cycle** | Member vote Oct. 15 – Dec. 15 |
| **January 1, 2027** | New Finance Committee term limits apply to incoming members |
| **July 1, 2027** | New caucus and Caucus Council structure takes effect |
| **By December 31, 2027** | Caucus Council directors seated on the Board |
| **One year after implementation** | Governance Committee reviews impact |

# Santiam Canyon School District 129J

Post Office Box 197
150 SW Evergreen St.
Mill City, Oregon 97360
Office (503) 897-2321

Krista Nieraeth, Superintendent
Nichole Cooper, Business Manager
Lindsay Sloan, AP & Payroll
Lisa Follis, District Secretary


## Board Recommendation Form

**To:** Santiam Canyon School District 129J Board of Directors

**Prepared By:** Krista Nieraeth, Superintendent

**Date:** October 21st, 2026

**Background:** Carl Anderson, who occupied Board Position #5, has resigned his board position as of September 30, 2026. The board must vote to accept his resignation.

**Action Requested:** To accept Mr. Anderson's resignation from the Santiam Canyon School District 129J Board of Directors.

**Motion Requested:** "I motion to accept Carl Anderson's resignation from the Santiam Canyon School District 129J Board of Directors."


Santiam Canyon School District does not discriminate on the basis of race, religion, color, national origin, disability, marital status, sexual orientation, sex or age in providing or access to benefits of education services, activities and programs in accordance with Title VI, Title VII, Title IX and other civil rights or discrimination issues; Section 504 of the Rehabilitation Act of 1973, as amended; and the American with Disabilities Act.

The following has been designated to coordinate compliance with these legal requirements and may be contacted at the Santiam Canyon School District office for additional information and/or compliance issues:, Title II Coordinator, Title IX Coordinator and Section 504 Coordinator: Director of Special Programs, 150 SW Evergreen St./PO Box 197, Mill City, OR 97360, (503) 897-2321

September 30, 2026

Elizabeth Reeser
Chair, Santiam Canyon School District 129J Board of Directors
Mill City, OR 97360

Dear Elizabeth and Members of the Board,

Please accept this letter as my resignation from the Santiam Canyon School District 129J Board of Directors, effective immediately.

I have given this a lot of thought. The work of the board matters, and the students and families in this district deserve members who can give the role the time and attention it requires. Right now, I cannot do that. Other responsibilities have grown in ways that leave me unable to prepare for meetings, stay current on the issues, and show up the way this position demands. Continuing under those conditions would not be fair to the board or to the community.

I am grateful for the chance to have served. I respect the seriousness with which this board approaches its work, and I appreciate the colleagues I have served with. Thank you for the trust that was placed in me.

Thank you again.

Sincerely,



Carl Anderson
49270 Kingwood Ave
Mill City, OR 97360
503-507-5497
hikefishbike@gmail.com

# Santiam Canyon School District 129J

Post Office Box 197
150 SW Evergreen St.
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Krista Nieraeth, Superintendent
Nichole Cooper, Business Manager
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Lisa Follis, District Secretary


## Board Recommendation Form

**To:** Santiam Canyon School District 129J Board of Directors

**Prepared By:** Krista Nieraeth, Superintendent

**Date:** October 21st, 2026

**Background:** Carl Anderson has resigned from the Santiam Canyon School District 129J Board of Directors. The board must now declare the position, which is Position #5, vacant.

**Action Requested:** To declare Position #5 vacant effective October 21, 2026.

**Motion Requested:** "I move to declare the Santiam Canyon School District 129J Board of Directors Position #5 vacant effective October 21, 2026."


Santiam Canyon School District does not discriminate on the basis of race, religion, color, national origin, disability, marital status, sexual orientation, sex or age in providing or access to benefits of education services, activities and programs in accordance with Title VI, Title VII, Title IX and other civil rights or discrimination issues; Section 504 of the Rehabilitation Act of 1973, as amended; and the American with Disabilities Act.

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# Santiam Canyon School District 129

Code: BBE
Adopted: 9/02/99
Readopted: 2/11/15; 12/16/25
Orig. Code: BBD

## Vacancies on the Board

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

The appointee will serve until June 30 of the next regular district election, at which time the individual elected in May of that year will fill the remaining portion of an unexpired term or serve a full four-year term. If, however, a vacancy occurs on a Board after the filing date for candidates, the appointee will serve until June 30 of the subsequent regular district election year. At the next regular district election, a replacement will be duly elected.

A Board member so elected as a replacement will serve the remaining year(s) of the term of office of the Board member being replaced.

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

Upon appointment by the Board, the newly appointed Board member(s) will be sworn and seated immediately.

If the offices of a majority of Board members are vacant at the same time, the Directors of the Linn-Benton-Lincoln Education Service District shall appoint persons to fill the vacancies from qualified school district voters.

END OF POLICY

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**Legal Reference(s):**

ORS 249.865 to -249.877
ORS 255.245
ORS 255.335
ORS 332.030
ORS 332.122
ORS 332.124

**Cross Reference(s):**

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

# Santiam Canyon School District 129

Code: BBE-AR
Revised/Reviewed: 9/16/26

## Board Member Vacancy Application

When a Board vacancy is declared, the Board will appoint a qualified person in accordance with Board policy BBE – Vacancies on the Board. To be considered for appointment, this form must be submitted to the district office by the deadline communicated by the district. Submitted applications become public records and may be disclosable upon request.

Name: _____

**Motivation and Experience**

Why do you want to serve on the Board?

_____
_____
_____
_____

Which experiences or perspectives will help you represent and serve all students and families?

_____
_____
_____
_____

How will you help advance the district's mission and goals?

_____
_____
_____
_____

How will you engage respectfully with individuals whose viewpoints differ from your own?

_____
_____
_____

**Knowledge, Time Commitment and Governance**

Availability: Board meetings, work sessions, and committee service often occur in the evenings and occasionally during the daytime. How will you balance Board obligations with other commitments?

_____

Laws applying to public entities: Briefly share any familiarity you have with Oregon public meetings and public records laws: _____
_____
_____

Policy and Budget: What experience do you have with policy development, budgets, or strategic planning?

Student-Centered Decision-Making: How will you ensure decisions reflect student outcomes, safety, and well-being?

*This page is intended for internal and verification purposes. It is not intended to be provided to the Board or discussed at a Board meeting. Once submitted, it is a public record and may be subject to disclosure.*

**Contact and Personal Information**

Name (as it appears on voter registration): _____

Preferred name (if different): _____

Position applying for: _____

**Note**: Your address is used only to verify residency within the district/zone, as required by Oregon law. Verification may be required.

Home street address (as it appears on voter registration):

_____

City: _____ State: OR _____

Primary phone: _____ Alternative phone: _____

Email: _____

Best way to contact you? ☐ Phone ☐ Email ☐ Text

**Accessibility and Accommodations**

We welcome applicants with disabilities. Do you need an accommodation to participate in interviews or meetings (e.g., ASL interpreter, materials in alternative formats, physical access, assistive technology)?

☐ No ☐ Yes (please describe): _____

**Attestations (Required)**

- ☐ The information I have provided is true and complete to the best of my knowledge.
- ☐ I meet the statutory eligibility for appointment: registered elector and one-year residency (ORS 332.018).
- ☐ [I reside in the zone corresponding to this vacancy (ORS 332.030 and ORS 332.122).]
- ☐ I am not disqualified by employee status (ORS 332.016).
- ☐ I understand the appointment duration (through June 30 after the next regular district election) (ORS 332.030(4)).

Signature: _____ Date: _____

# Santiam Canyon School District 129J

Post Office Box 197
150 SW Evergreen St.
Mill City, Oregon 97360
Office (503) 897-2321

Krista Nieraeth, Superintendent
Nichole Cooper, Business Manager
Lindsay Sloan, AP & Payroll
Lisa Follis, District Secretary


## Board Recommendation Form

**To:** Santiam Canyon School District 129J Board of Directors

**Prepared By:** Krista Nieraeth, Superintendent

**Date:** October 21st, 2026

**Background:** Each year, the Board adopts a Superintendent Evaluation Prcoess and Timeline to ensure that the annual evaluation cycle of the Superintendent is complete fully and in a timely manner.

**Action Requested:** To approve the 2026 – 27 Superintendent Evaluation Process and Timeline.

**Motion Requested:** **"**I move to approve the 2026 – 27 Superintendent Evaluation Process and Timeline as presented."


Santiam Canyon School District does not discriminate on the basis of race, religion, color, national origin, disability, marital status, sexual orientation, sex or age in providing or access to benefits of education services, activities and programs in accordance with Title VI, Title VII, Title IX and other civil rights or discrimination issues; Section 504 of the Rehabilitation Act of 1973, as amended; and the American with Disabilities Act.

The following has been designated to coordinate compliance with these legal requirements and may be contacted at the Santiam Canyon School District office for additional information and/or compliance issues:, Title II Coordinator, Title IX Coordinator and Section 504 Coordinator: Director of Special Programs, 150 SW Evergreen St./PO Box 197, Mill City, OR 97360, (503) 897-2321

# 2026-27 Santiam Canyon Superintendent Evaluation Process & Timeline

| Date | Activity |
|---|---|
| October 2026 School Board Meeting | **Board Public Meeting**<br>● Adopt Superintendent Evaluation Timeline<br>● Review and Adopt Superintendent Goals<br>● Discuss if Targeted Feedback Survey (TFS) will be included in evaluation process.<br>  • If a TFS is included as part of the evaluation criteria, the board must contract with OSBA to administer the survey and facilitate the superintendent evaluation in executive session*.<br>  • Must have TFS planning session with OSBA, where the board selects the evaluation standards to be included in the survey and identifies the survey participants. |
| Nov/Dec 2026 | **Board Public Meeting**<br>● TFS Planning Session with OSBA<br>● TFS Survey given to identified survey participants |
| December 2026 / Feb. 2027 | **Check-in Meetings** - *These meetings may be conducted in executive sessions if discussions are evaluative in nature. ORS 192.660(2)(i)*<br>● Board and superintendent meet to discuss the progress of standards and superintendent goals (if applicable).<br>● These meetings are typically part of a quarterly or mid-year review process and should be planned during the adoption of the evaluation process. |
| early March | **Superintendent Self-Evaluation**<br>● Superintendent self-evaluation and artifacts presented to the board for consideration. |
| Mid- March | **Individual Board Members Fill Out Evaluation**<br>● Individual board members submit their scores and comments on the superintendent evaluation. |
| April 2027 | **Executive Session* - Superintendent Evaluation**<br>***Facilitated by OSBA***<br>● If applicable, Targeted Feedback Survey (TFS) summary of results presented<br>● Board members discuss their individual evaluations, superintendent's self-evaluation, artifacts and TFS (if applicable) to develop the board's written summative evaluation report that will be shared with the superintendent.<br>● Board chair presents draft summative evaluation report (draft copy) to the superintendent. |
| April 2027 Board Meeting | **Executive Session* - Superintendent Summative Evaluation Discussion**<br>***Facilitated by OSBA***<br>● The board meets with the superintendent to discuss and clarify the draft summative evaluation report.<br>● Superintendent exits executive session.<br>● The board discusses summative evaluation further, if needed.<br>● The board exits the executive session and opens public meeting to approve final summative evaluation report.<br>● A copy of the approved summative evaluation report is placed in the superintendent's personnel file.<br>● Board chair reads public evaluation summary, which may be created by OSBA facilitator. |

**To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing. (ORS 192.660(2)(i))*

*This adopted process and timeline shall serve as notice to the superintendent of the pending stated executive sessions within this document.*

Gmail

**Krista Nieraeth <krista.nieraeth@santiam.k12.or.us>**

# Superintendent Evaluation Timeline & Dates

1 message

**Janet Avila-Medina** <javilamedina@osba.org> Thu, Oct 1, 2026 at 9:43 AM
To: Krista Nieraeth <krista.nieraeth@santiam.k12.or.us>, Elizabeth Reeser <elizabeth.reeser@santiam.k12.or.us>
Cc: Lisa Follis <lisa.follis@santiam.k12.or.us>

Hi Krista & Elizabeth,

It was great working with the board last tonight to discuss the evaluation process.

Attached is the timeline. Listed below are the dates I am currently available, Nov.-April. I skipped March since no meetings are needed. My schedule is pretty flexible except for November.

Once you have the draft dates, please let me know so I can put a hold on my calendar before the date gets taken. Thanks!

- Nov. 2
- Nov. 30
- Dec. 1
- Dec. 3
- Dec. 7-11
- Dec. 16-18
- Jan. 4-8
- Jan. 11-15
- Jan. 21 & 22
- Jan. 25-29
- Feb. 1-5
- Feb. 8-12
- Feb. 17-19
- Feb. 22-26
- April 1 & 2
- April 5 -9
- April 12-16
- April 19
- April 21-23
- April 26-30

Best,
Janet

**Janet Avila-Medina** *she\her*
**Board Development Specialist**
**Oregon School Boards Association**
971-446-0394 | javilamedina@osba.org | osba.org







**Superintendent Evaluation Process -Timeline Template.docx**
19K

# SCOPE OF WORK FOR OSBA SERVICES

## *Facilitation of a superintendent evaluation & Targeted Feedback Survey*

## SCOPE OF WORK

The following work will be facilitated in the process:

- Selection of standards and audience to survey in the Targeted Feedback Survey (TFS)
- Creation of survey and administration to selected participants
- Collection and analysis of data from the TFS
- Presentation of TFS summary of data to the board
- Facilitation of superintendent evaluation discussion and drafting of formal superintendent evaluation document

## TIMELINE

The following minimum number of meetings are needed for the TFS and superintendent evaluation project:

- Planning Meeting: Selection of standards and participants (virtual—this is a short meeting)
    - One week is needed to build and send survey after district chooses participants and sends contact information
    - Two-three weeks are needed to keep the survey open
    - One week is needed to collect, analyze, and prepare data
- Superintendent Evaluation Session One: Delivery of TFS summary results and facilitation of superintendent evaluation discussion (in-person or virtual)
- Superintendent Evaluation Session Two: Facilitation of superintendent evaluation discussion and drafting of formal document (in-person or virtual)

## COST FOR PROFESSIONAL SERVICES:

**Professional Time:** $200/hour

**Clerical Services:** $57/hour

**Travel Time (if applicable):** $100/hour

**Mileage (if applicable & calculated from the consultant's location):** IRS Rate

**Meals, lodging and other expenses (if applicable):** Actual Cost

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## Board Recommendation Form

**To:** Santiam Canyon School District 129J Board of Directors

**Prepared By:** Krista Nieraeth, Superintendent

**Date:** October 21st, 2026

**Background:** Each year, the superintendent and School Board collaboratively establish general goals and specific objectives for the school year. These goals are documented in writing and include mutually agreed-upon criteria for evaluating the superintendent's performance. I have attached my proposed goals for Board consideration.

This year, I am proposing two goals focused on **Strategic Plan Development** and **Student Learning and Instruction.**

The district established three maxims in 2023. Those maxims, along with our goals and reporting metrics, need to be reviewed and updated to reflect current student and community needs and align with state accountability requirements. My first goal is to lead the development of a clear, actionable, Board-approved strategic plan that establishes priorities, desired outcomes, measurable targets, and completion timelines. In collaboration with Kyle Laier and his team, this process will include community outreach and meaningful opportunities for participation. This involvement will help shape the district's direction while supporting compliance with community engagement requirements tied to state grant funding.

My second goal is to strengthen instructional practices through high-quality teaching and student-centered instruction. This work includes implementing a common observation and feedback tool, providing professional development opportunities for all staff, establishing data teams to guide instructional decisions, and developing attendance teams to identify chronically absent students and work with families to improve attendance. My role will be to support implementation of these initiatives in each building, monitor progress, provide guidance to building administration, and provide regular updates to the Board.

**Action Requested:** To approve the Superintendent Goals for the 2026 – 27 School Year.

**Motion Requested:** **"**I motion to approve the Superintendent Goals for the 2026 – 27 School Year as presented."


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The following has been designated to coordinate compliance with these legal requirements and may be contacted at the Santiam Canyon School District office for additional information and/or compliance issues:, Title II Coordinator, Title IX Coordinator and Section 504 Coordinator: Director of Special Programs, 150 SW Evergreen St./PO Box 197, Mill City, OR 97360, (503) 897-2321

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# 2026 - 2027 Superintendent Goals

*Goal 1: Lead the development of a clear, actionable, board-approved strategic plan.*

**Measurable Action Steps:**

- Gather input from students, staff, families, and community partners through focus groups and surveys to identify district strengths, needs, and priorities. Share key findings with the board to guide strategic planning.
- Use district maxims, stakeholder input, and district data to develop focused, measurable priorities. For each priority, identify desired outcomes, measurable targets, responsible leaders, and completion timelines.
- Present the strategic plan to the board for review and approval by June 2027.
- Establish a system for monitoring progress, including quarterly board updates and an annual review to evaluate results and adjust implementation as needed.

This goal aligns with District Maxim #1 – Stand Together and District Maxim #2 – Find Your Path

*Goal 2: Strengthen high quality, student-centered instruction across the district*

**Measurable Action Steps:**

- Implement a common classroom observation and feedback tool across both buildings to provide staff with consistent, actionable feedback aligned with district instructional priorities. Review implementation and instructional trends at least quarterly.
- Provide at least two targeted professional development opportunities for administrators, licensed staff, and instructional assistants, with follow-up opportunities to apply strategies and receive feedback.
- Establish monthly school-level data team meetings and quarterly district-level data team meetings to review student progress, identify needs, and document instructional adjustments and interventions.
- Review K–8 reading and math interim assessment data at least three times annually and present findings to the board, including student growth, areas of need, and planned instructional responses.
- Ensure each building reviews student attendance monthly, contacts families of students at risk of chronic absenteeism, and documents support plans and follow-up.

NON-DISCRIMINATION: The Santiam Canyon School District 129J is committed to establishing and maintaining a safe and nondiscriminatory educational environment. Santiam Canyon School District 129J does not discriminate and prohibits discrimination in any programs or activities on the basis of protected class, including age, citizenship status, color, disability, gender identity, immigration status, marital status, national origin, race, religion, sex, or sexual orientation. The following employees have been designated to handle questions and complaints of alleged discrimination: Krista Nieraeth, Title IX and Civil Rights Coordinator, krista.nieraeth@santiam.k12.or.us or (503) 897 – 2321 Jess Rist, Section 504 and ADA/Title II Coordinator, jess.rist@santiam.k12.or.us or (503) 897 - 2321

- Increase the district's regular attendance rate by at least two percentage points over the previous school year, using comparable reporting periods.

This goal aligns with District Maxim #1 – Stand Together, District Maxim #2 – Find Your Path, and District Maxim #3 – Never Give Up

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## Board Recommendation Form

**To:** Santiam Canyon School District 129J Board of Directors

**Prepared By:** Krista Nieraeth, Superintendent

**Date:** October 26th, 2026

**Background:** At the March 2026 board meeting, the board approved the 2026 – 2027 School Academic Calendar. The amended academic calendar is presented for Board approval to remove the December and April inservice days, bringing licensed staff work hours into compliance with the CBA's annual limit of 1,522.5 hours. A review with the union and district office staff confirmed that instructional days were correct, but the adopted calendar included excess inservice days. Additional verification of workdays and hours will be incorporated into future calendar planning.

**Action Requested:** To accept the 2026 – 2027 Academic Calendar as amended.

**Motion Requested:** "I motion to accept the 2026 – 2027 Academic Calendar as amended."


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# Santiam Canyon 2026-2027 School Year Calendar

## July 2026

| Su | Mon | Tue | Wed | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 | 3, 4th of July (observance) |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 | |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 | |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 | |
| 26 | 27 | 28 | 29 | 30 | 31 | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | 0/0 Staff Days |
| | | | | | | | 0/0 Student Days |

## August 2026

| Su | Mon | Tue | Wed | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | | | | | 1 | 11-12, Registration |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 | 24-27, Inservice |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 | 31, First Day of School |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 | |
| 23 | IN | IN | IN | IN | 28 | 29 | |
| 30 | 31 | | | | | | 5/5 Staff Days |
| | | | | | | | 1/1 Student Days |

## September 2026

| Su | Mon | Tue | Wed | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | NC | 5 | 7, Labor Day |
| 6 | H | 8 | 9 | 10 | 11 | 12 | 11, Friday School |
| 13 | 14 | 15 | 16 | 17 | IN | 19 | 18, Inservice |
| 20 | 21 | 22 | 23 | 24 | NC | 26 | |
| 27 | 28 | 29 | 30 | | | | |
| | | | | | | | |
| | | | | | | | 19/24 Staff Days |
| | | | | | | | 18/19 Student Days |

## October 2026

| Su | Mon | Tue | Wed | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | | | 1 | IN | 3 | 2, Inservice |
| 4 | 5 | 6 | 7 | 8 | NC | 10 | 16, Statewide Inservice |
| 11 | 12 | 13 | 14 | 15 | IN | 17 | 30, Grading Day |
| 18 | 19 | 20 | 21 | 22 | NC | 24 | |
| 25 | 26 | 27 | 28 | 29 | GR | 31 | |
| | | | | | | | 20/44 Staff Days |
| | | | | | | | 17/36 Student Days |

## November 2026

| Su | Mon | Tue | Wed | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | NC | 7 | 11, Veteran's Day |
| 8 | 9 | 10 | H | 12 | 13 | 14 | 13, Friday School |
| 15 | 16 | 17 | 18 | 19/C | C | 21 | 19, SES Half Day / PM Conferences |
| 22 | 23 | 24 | NC | NC | NC | 28 | 19, SJSHS Evening Conferences |
| 29 | 30 | | | | | | 20 - SES and SJSHS AM Conferences |
| | | | | | | | 25-27, Thanksgiving Break |
| | | | | | | | 16/60 Staff Days |
| | | | | | | | 15/51 Student Days |

## December 2026

| Su | Mon | Tue | Wed | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | NC | 5 | |
| 6 | 7 | 8 | 9 | 10 | NC | 12 | 18, 1/2 Day for Students |
| 13 | 14 | 15 | 16 | 17 | HD | 19 | 21-31, Winter Break |
| 20 | NC | NC | NC | NC | NC | 26 | |
| 27 | NC | NC | NC | NC | | | |
| | | | | | | | 12/72 Staff Days |
| | | | | | | | 12/63 Student Days |

## January 2027

| Sun | Mon | Tue | We | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | | | | NC | 2 | 1, Winter Break |
| 3 | IN | 5 | 6 | 7 | 8 | 9 | 4, Inservice |
| 10 | 11 | 12 | 13 | 14 | NC | 16 | 5, Students Return |
| 17 | NC | 19 | 20 | 21 | 22 | 23 | 8, Friday School |
| 24 | 25 | 26 | 27 | 28 | GR | 30 | 18, MLK Jr. Day |
| 31 | | | | | | | 22, Friday School |
| | | | | | | | 29, Grading Day |
| | | | | | | | 18/90 Staff Days |
| | | | | | | | 16/79 Student Days |

## February 2027

| Sun | Mon | Tue | We | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | NC | 6 | 15, President's Day |
| 7 | 8 | 9 | 10 | 11 | NC | 13 | 19, Friday School |
| 14 | H | 16 | 17 | 18 | 19 | 20 | 26, Inservice |
| 21 | 22 | 23 | 24 | 25 | IN | 27 | |
| 28 | | | | | | | |
| | | | | | | | 17/107 Staff Days |
| | | | | | | | 16/95 Student Days |

## March 2027

| Sun | Mon | Tue | We | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | NC | 6 | 12 - Inservice |
| 7 | 8 | 9 | 10 | 11 | IN | 13 | 22-26, Spring Break |
| 14 | 15 | 16 | 17 | 18 | NC | 20 | |
| 21 | NC | NC | NC | NC | NC | 27 | |
| 28 | 29 | 30 | 31 | | | | |
| | | | | | | | |
| | | | | | | | 16/123 Staff Days |
| | | | | | | | 15/110 Student Days |

## April 2027

| Sun | Mon | Tue | We | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | | | 1 | G | 3 | 2, Grading Day |
| 4 | 5 | 6 | 7 | 8 | NC | 10 | 15, SES Half Day / PM Conferences |
| 11 | 12 | 13 | 14 | 15/C | C | 17 | 15, SJSHS Evening Conferences |
| 18 | 19 | 20 | 21 | 22 | NC | 24 | 16, SES and SJSHS AM Conferences |
| 25 | 26 | 27 | 28 | 29 | NC | | |
| | | | | | | | 19/142 Staff Days |
| | | | | | | | 17/127 Student Days |

## May 2027

| Sun | Mon | Tue | We | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | | | | | 1 | |
| 2 | 3 | 4 | 5 | 6 | NC | 8 | 14, Inservice |
| 9 | 10 | 11 | 12 | 13 | IN | 15 | 31, Memorial Day |
| 16 | 17 | 18 | 19 | 20 | NC | 22 | |
| 23 | 24 | 25 | 26 | 27 | NC | 29 | |
| 30 | H | | | | | | |
| | | | | | | | 17/159 Staff Days |
| | | | | | | | 16/143 Student Days |

## June 2027

| Sun | Mon | Tue | We | Thu | Fri | Sat | |
|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 | 3, Seniors Last Day |
| 6 | 7 | 8 | 9 | HD | GR | 12 | 4, Friday School & Graduation |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 | 10, Last Day, 1/2 Day for Students |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 | 11, Grading Day |
| 27 | 28 | 29 | 30 | | | | |
| | | | | | | | 9/168 + 2 Staff Days |
| | | | | | | | 8/151 Student Days |

**C**=Conferences, **GR**=Grading, **H**=Holiday, **HD**=Half Day, **IN**=Inservice, **NC**=Non-Contract Day

adopted

**2 flexible days for certified staff (worked between Aug 4 and Oct 31). This will bring the total staff days to 170**

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Krista Nieraeth, Superintendent
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Lindsay Sloan, HR & Payroll
Lisa Follis, District Secretary


## Board Recommendation Form

**To:** Santiam Canyon School District 129J Board of Directors

**Prepared By:** Krista Nieraeth, Superintendent

**Date:** October 21st, 2026

**Background:** Santiam Canyon SD currently has a PERS side account that expired at the end of The district's existing PERS side account is expected to be fully depleted in the summer of 2027. Established with approximately $4.6 million in bond proceeds in 2004, the account allowed the district to make an upfront payment toward its pension obligations. PERS invests these funds and uses them over time to reduce the district's required employer contributions. Since its inception, the side account has provided approximately $2.1 million in savings on PERS payments.

Resolution No. 26.27.02 would authorize Santiam Canyon School District to participate in the Oregon Education Districts Pension Bond Program to establish a new PERS side account and potentially reduce future pension costs. The district's estimated share of PERS's unfunded pension liability—the gap between projected pension obligations and the assets available to pay them—was $6.77 million as of December 31, 2024. The final borrowing amount would be based on updated figures and issuance costs.

The resolution limits the bonds' true interest cost to 5.00% or lower, meaning the bonds could not be sold if that limit is exceeded. It also authorizes the superintendent, business manager, or superintendent's designee to finalize the financing without further board action. The district would remain responsible for repaying its bonds regardless of investment performance, and savings are not guaranteed.


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**Motion Requested:** If the board chooses to go forward with a PERS side account, the following motion is needed:

"I move to approve Resolution No. 26.27.02 - A RESOLUTION OF THE BOARD OF DIRECTORS OF SANTIAM CANYON SCHOOL DISTRICT NO. 129J, LINN AND MARION COUNTIES, OREGON, AUTHORIZING PARTICIPATION IN THE OREGON EDUCATION DISTRICTS PENSION BOND PROGRAM; AUTHORIZING A FULL FAITH AND CREDIT PENSION BOND AND RELATED FULL FAITH AND CREDIT PENSION OBLIGATIONS, TO BE ISSUED IN ONE OR MORE SERIES."

If the board chooses not to move forward with a PERS side account, no motion is needed.

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**RESOLUTION NO. 26.27.02**

**A RESOLUTION OF THE BOARD OF DIRECTORS OF SANTIAM CANYON SCHOOL DISTRICT NO. 129J, LINN AND MARION COUNTIES, OREGON, AUTHORIZING PARTICIPATION IN THE OREGON EDUCATION DISTRICTS PENSION BOND PROGRAM; AUTHORIZING A FULL FAITH AND CREDIT PENSION BOND AND RELATED FULL FAITH AND CREDIT PENSION OBLIGATIONS, TO BE ISSUED IN ONE OR MORE SERIES.**

WHEREAS, the Board of Directors of Santiam Canyon School District No. 129J, Linn and Marion Counties, Oregon, is authorized by Oregon Revised Statutes ("ORS") 238.692 to 238.698, including any amendments thereto (the "Act"), to issue revenue bonds under ORS Chapter 287A to finance its pension liability;

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

WHEREAS, school districts and education service districts have a pooled unfunded pension liability to the Oregon Public Employees Retirement System ("OPERS") and, based on the District's portion of the total school district and education service district payroll, the District's allocated portion of the unfunded pension liability (the "Pension Liability") is estimated to be $6,774,636 as of December 31, 2024;

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

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

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

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

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

THE BOARD OF DIRECTORS OF SANTIAM CANYON SCHOOL DISTRICT NO. 129J, LINN AND MARION COUNTIES, OREGON RESOLVES:

**Section 1. Definitions.**

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

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

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

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

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

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

"District" means Santiam Canyon School District No. 129J, Linn and Marion Counties, Oregon, or its successors.

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

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

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

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

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

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

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

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

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

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

"School District Official" means the Superintendent or Business Manager of the School District or the Superintendent's designee.

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

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

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

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

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

**Section 2. Bond Authorized.**

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

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

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

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

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

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

**Section 3. Delegation.**

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

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

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

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

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

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

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

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

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

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

**Section 4. Security for Bond.**

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

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

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

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

**Section 5. Prepayment.**

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

**Section 6. Covenants.**

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

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

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

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

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

**Section 7. Amendment of Resolution.**

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

**Section 8. State Intercept Agreement.**

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

**Section 9. Default and Remedies.**

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

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

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

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

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

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

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

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

**Section 10. Defeasance.**

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

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

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

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

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

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

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

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

**Section 11. Rules of Construction.**

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

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

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

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

**Section 12. Effective Date.**

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

ADOPTED by the Board of Directors of Santiam Canyon School District No. 129J, located in Linn and Marion Counties, Oregon this 21st day of October, 2026.

**Santiam Canyon School District No. 129J**
**Linn and Marion Counties, Oregon**

By: _____
Chair

**ATTEST:**

By: _____
Superintendent

## Exhibit A

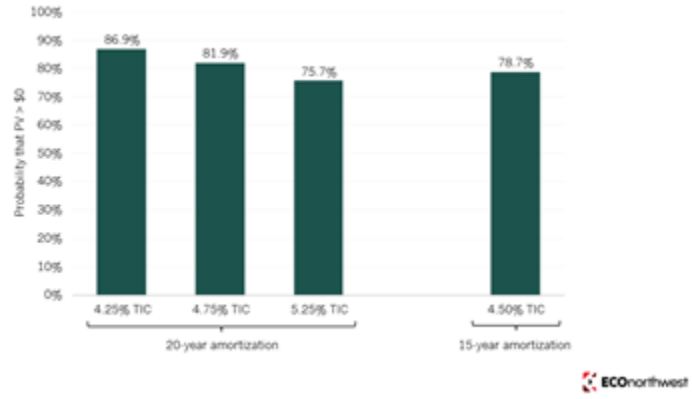
## Report on Pension Bonds

Prior to the issuance of pension obligation bonds, the Santiam Canyon School District No. 129J (the "District") has obtained a statistically based assessment from ECONorthwest entitled "Issuance of Pension Obligation Bonds – A Risk/Reward Analysis" dated as of June 11, 2026 (the "Assessment") pursuant to ORS 238.697(1)(a).

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

In connection with the issuance of pension obligation bonds, the District has not retained the services of an independent municipal advisor registered with the Securities and Exchange Commission.

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



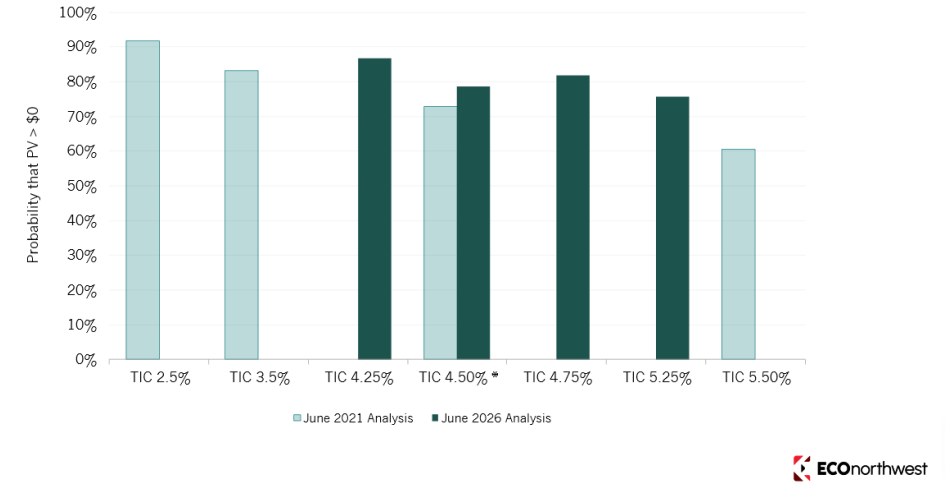
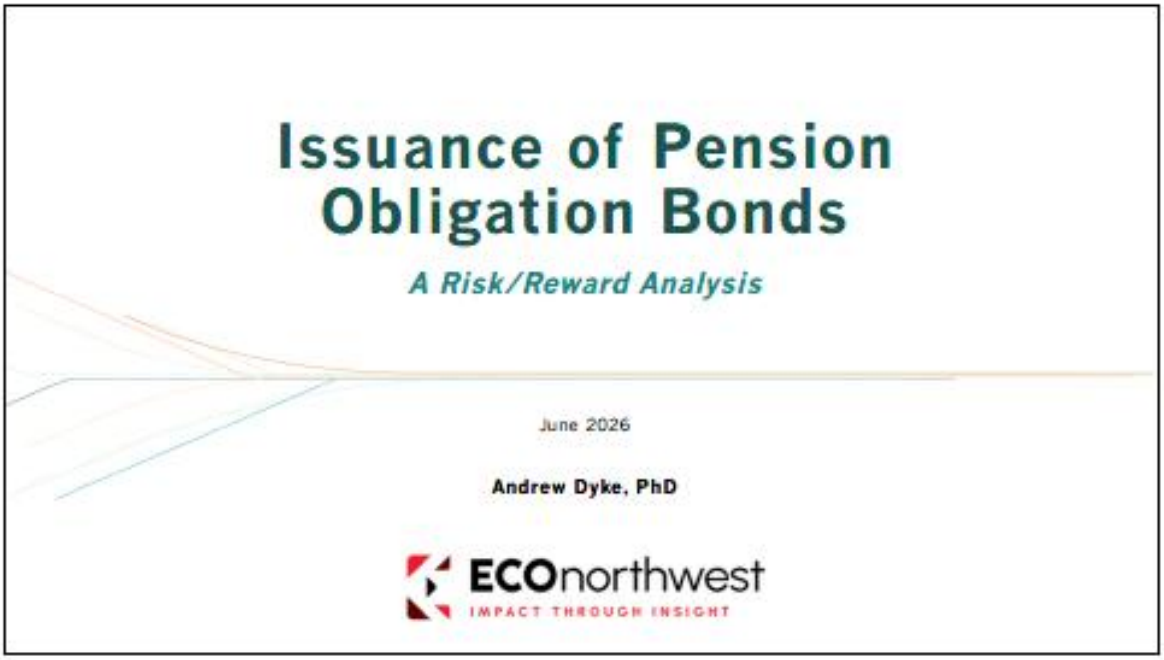



**Exhibit 1 to the Report**

**Assessment**




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## Presentation Outline

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


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

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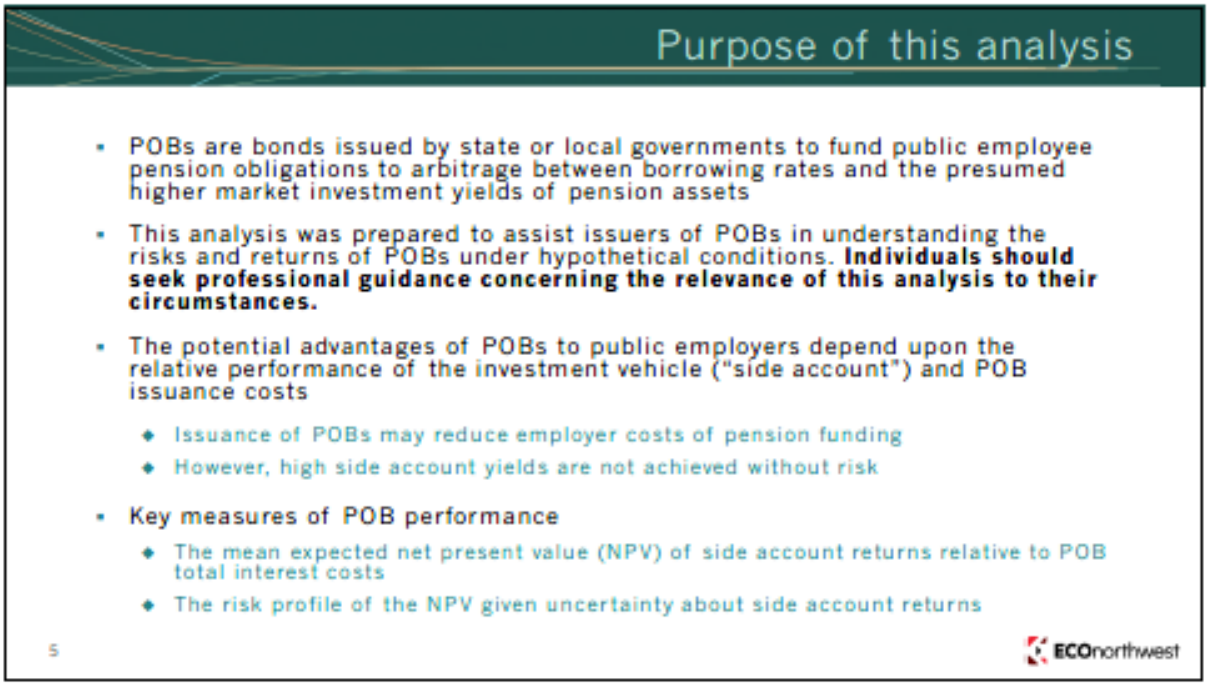
## Basics of POBs

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


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

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

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


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

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## The Model

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


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

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## Asset Return and Allocation Assumptions

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

Source: ECOnorthwest from OIC data.

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



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

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## Asset Return and Allocation Assumptions

**Asset Class Returns Correlation over Time**

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



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

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## Asset Return and Allocation Assumptions

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


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




## Account Amortization

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


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

# Model Results

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## Mean Annual Side Account Returns

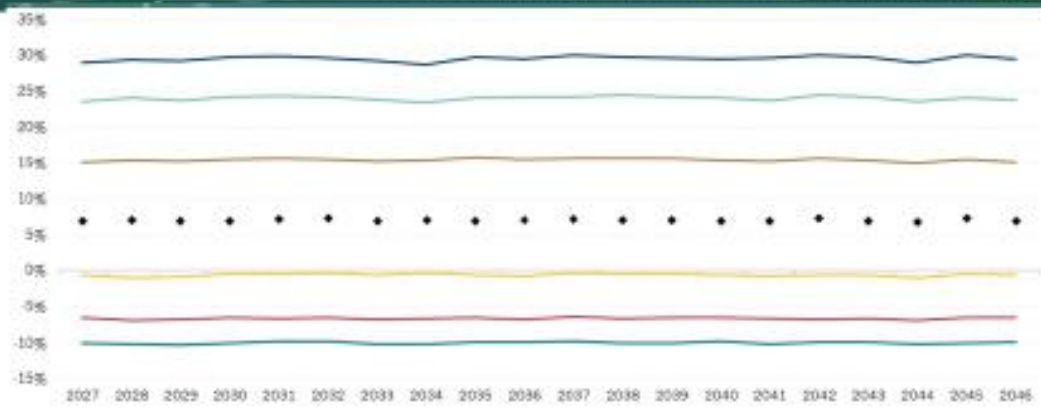
- The forecast extends to fiscal year 2047, the last year the side account exists
  - **Trend in mean annual return:** Stays constant at 6.8% in 2027, varying slightly through the end of the forecast horizon
  - **Trend in 95th percentile return:** Increases from 29.0% in 2027 to 29.6% as of the forecast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

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## Mean Annual Side Account Returns




| Percentile | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | 2034 | 2035 | 2036 | 2037 | 2038 | 2039 | 2040 | 2041 | 2042 | 2043 | 2044 | 2045 | 2046 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 95th | 29.9% | 29.4% | 29.3% | 29.8% | 29.9% | 29.7% | 29.2% | 28.7% | 29.1% | 29.6% | 30.1% | 29.7% | 29.6% | 29.9% | 29.6% | 30.0% | 29.7% | 29.8% | 30.1% | 29.6% |
| 80th | 23.6% | 24.1% | 23.7% | 24.2% | 24.3% | 24.2% | 23.9% | 23.5% | 24.1% | 24.2% | 24.2% | 24.0% | 24.1% | 24.0% | 23.7% | 24.5% | 24.3% | 23.6% | 24.1% | 23.8% |
| 75th | 15.2% | 15.4% | 15.3% | 15.5% | 15.7% | 15.6% | 15.3% | 15.4% | 15.7% | 15.6% | 15.6% | 15.7% | 15.7% | 15.4% | 15.3% | 15.7% | 15.4% | 15.0% | 15.5% | 15.1% |
| 50th | 6.8% | 7.0% | 6.8% | 6.9% | 7.1% | 7.2% | 6.8% | 7.0% | 6.9% | 7.0% | 7.1% | 7.0% | 7.0% | 6.8% | 6.8% | 7.2% | 6.8% | 6.7% | 7.1% | 6.8% |
| 25th | -0.6% | -1.0% | -0.8% | -0.5% | -0.5% | -0.4% | -0.7% | -0.4% | -0.6% | -0.8% | -0.4% | -0.4% | -0.5% | -0.6% | -0.8% | -0.6% | -0.6% | -1.0% | -0.6% | -0.6% |
| 10th | -6.6% | -6.9% | -6.8% | -6.5% | -6.7% | -6.5% | -6.8% | -6.8% | -6.5% | -6.8% | -6.5% | -6.7% | -6.6% | -6.6% | -6.8% | -6.8% | -6.7% | -7.0% | -6.6% | -6.6% |
| 5th | -10.1% | -10.2% | -10.3% | -10.1% | -9.8% | -9.8% | -10.1% | -10.2% | -10.0% | -9.9% | -9.7% | -10.0% | -10.0% | -9.8% | -10.1% | -9.9% | -10.3% | -10.2% | -10.0% | -9.9% |



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## Geometric Mean Returns

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

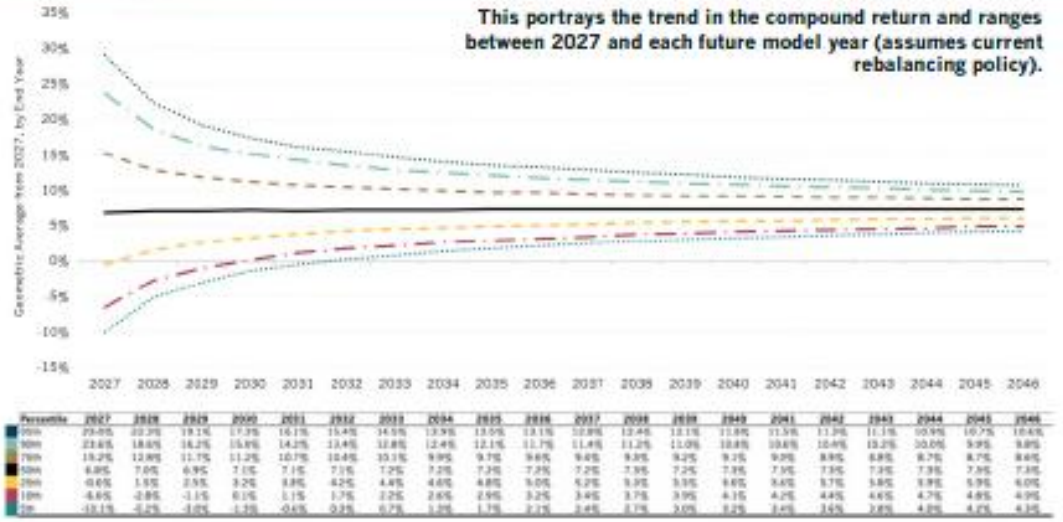


This analysis was prepared to assist issuers of POBs in understanding the risks and returns of POBs under hypothetical conditions. Individuals should seek professional guidance concerning the relevance of this analysis to their circumstances.

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## Geometric Mean Returns from 2027, by Year

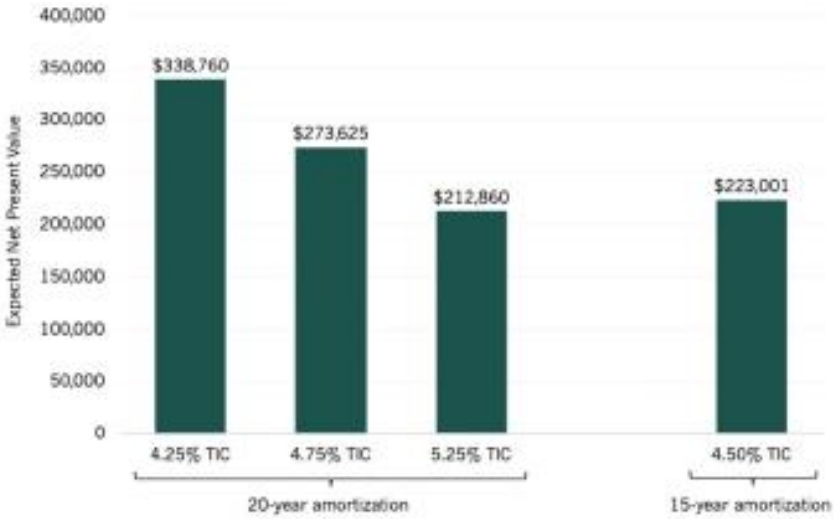



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## NPV of the POB strategy varies inversely with TIC




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## Measuring the risk of POBs

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

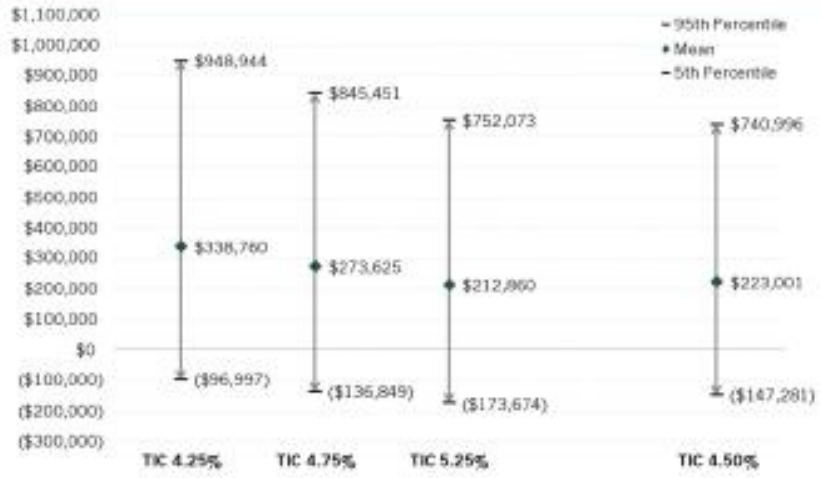
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## The Effect of TIC on NPV of POBs




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## POB Probability of Success: NPV > $0

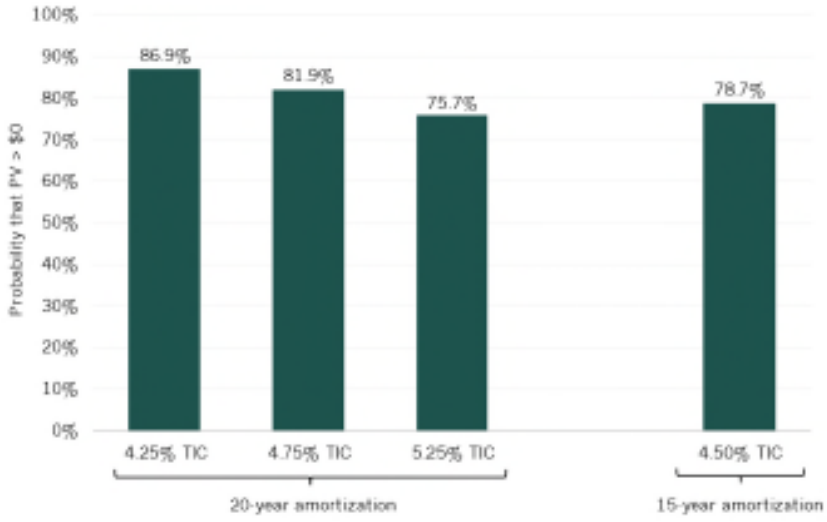
- The "probability of success" is another perspective on risk
  - The VaR measures the 5th percentile dollar value at risk
  - The "probability of success" or zero-bound identifies the overall probability that the NPV benefit is greater than zero (i.e., a success)
- Model results
  - The probability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

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## Probability that NPV is More than $0

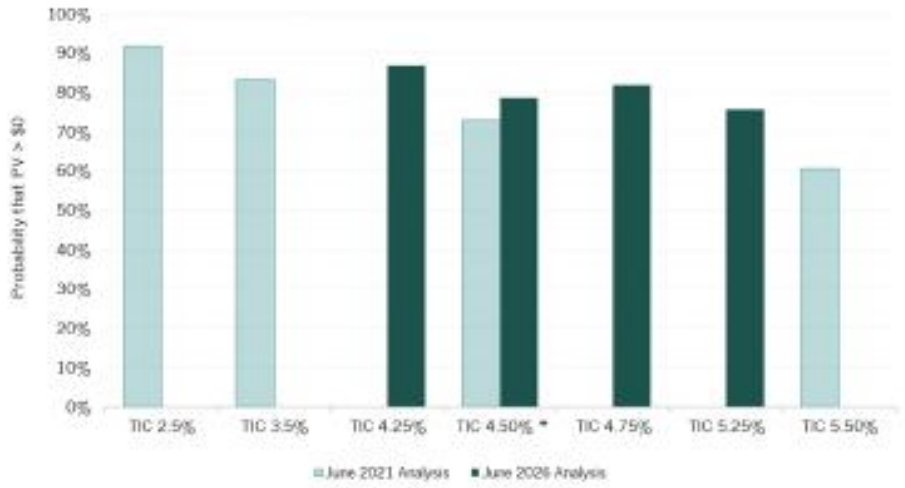



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## Probability that NPV is More than $0




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## Summary Statistics, by Scenario

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

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

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## Conclusions

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


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

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## Acknowledgements, Caveats, and Disclaimers

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

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

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


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