# Alsea School Board Meeting

Tuesday, March 11, 2025 6:00 PM
Alsea School Library, 301 S 3rd St, Alsea, OR 97324

1. **Call to Order**
   a. Flag Salute
   b. Approval of Agenda
2. **Consent Agenda**
   a. Approval of Minutes - February 10, 2025

Alsea School Board Meeting
Monday, February 10, 2025
6:00 PM, Alsea School Library

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

**Board Members Present:** Risteen Follett, Soren Rounds, Jamie Olsen, Deb Lindberg, Russ Ceperich
**Board Members Absent:** None
**Staff Present:** Krista Nieraeth, Roxie Smallwood, Don Staehely, Lora Nickle. Attending online: Joe Harris, Heather Shunk
**Patrons Present:** Joy Jordan, Addy Leavitt, Brian Leavitt, Chris Leavitt, Nicole Darcy present online.

1. **Call to Order - 6:00 PM**
   a. Flag Salute
   b. Approval of Agenda

   Approved with the addition of 5d. March 17, 2025 Board Meeting.
2. **Consent Agenda**
   a. Approval of Minutes
      - January 13, 2025
   b. New Hire
      - Stephanie Lewis, Bus Driver
   c. Surplus: WLA bus

   Jamie Olsen motioned to approve the Consent agenda with the revision of the January 13th minutes per Soren. Soren Rounds seconded. Motion carried 5-0.
3. **Patron Comments: None**
4. **Reports**
   a. Student Spotlight
      i. Addy Leavitt, 5th grade

   Addy Leavitt presented her thunder eggs to the Board. She expressed that she wants to be a Geologist when she grows up. The Board asked questions and thanked her for sharing her passion.
   b. Superintendent and K-12 Principal Reports
      i. Superintendent Report

   Ms. Nieraeth presented her report to the Board. The documents are available online. The Board discussed.
      ii. K-12 Principal Building Report

   Ms. Nieraeth presented her report to the Board. The documents are available online.
      iii. Regular Attenders and Enrollment

   Ms. Nieraeth presented her report to the Board. The documents are available online.
   c. K-5 LaHO Principal Report

   Ms. Shunk presented her report to the Board. The documents are available online.
   d. Athletics and Activities

   Mr. Harris presented his report to the Board. The document is available online.
   e. Business Manager Report

   Mr. Staehely presented his report to the Board. The documents are available online.
   f. Bond and Construction

   Ms. Nieraeth presented the report to the Board. The documents are available online.

5. **New Business**
   a. Audit

Nicole Darcy with Pauly, Rogers and Co., P.C presented the audit report to the Board. The Board asked clarifying questions. Mr. Staehely and Ms. Smallwood spoke to the Board about the deficiencies and what corrective actions have been done.

   i. Resolution - 25-05 - Financial Audit

Russ Ceperich motioned to accept Resolution 25-05. Resolution accepting the finding of external auditors report on the district's financial statements ending June 30, 2024. Deb Lindberg seconded. The Board discussed. Motion carried 5-0

   b. Baseball Co-Op between Monroe and Alsea

Mr. Harris presented to the Board. The document is available online.
Russ Ceperich motioned that Alsea School Board approve the High School baseball co-op with Monroe High School for the 2024-2025 school year. Deb Lindberg seconded. The Board discussed at length. Motion carried 5-0.

   c. 2025 - 2026 Academic Calendar

Ms. Nieraeth spoke to the Board the differences between the three Academic Calendar options. Risteen Follett motioned to approve version A as the calendar for 2025-26 school year. Soren Rounds seconded the motion. The board discussed the versions at length. Motion carried 4-1.

   d. March 17, 2025 Board meeting

Risteen Follett spoke to the Board about the Superintendent Evaluation process. A date and time was set for an Executive Session on March 17th at 7:00 PM. Ms. Nickle will invite Vince Adams from OSBA.

6. **Old Business**
   - IKJ - Artificial Intelligence - Next Steps
     - Tigard-Tualatin Policies

Ms. Nieraeth spoke to the Board about these policies. OSBA stated that these are not policies that they worked with them on. Ms. Nieraeth will be discussing with her peers to see what other districts are doing. The Board discussed.

7. **First Reading *(Shaded words are new/strikethroughs are deleted)**
8. **Second Reading**
   a. AC - Nondiscrimination and Civil Rights - 2nd reading
   b. GCBDA/GDBDA - Family Leave - 2nd reading
   c. GCBDA/GDBDA - AR - Family Leave - 2nd reading
   d. GCBDC/GDBDC - Domestic Violence, Harassment, Sexual Assault, Bias, or Stalking Leave (Safe Leave) - 2nd reading
   e. GCBDC/GDBDC-AR - Request for Domestic Violence, Harassment, Sexual Assault, Bias, or Stalking Leave - 2nd reading
   f. GCBDF/GDBDF - Paid Family and Medical Leave Insurance - 2nd reading
   g. GCBDF/GDBDF-AR - Paid Family and Medical Leave Insurance (PFMLI) - 2nd reading
   h. IIA - Instructional Materials - 2nd reading
   i. IIA-AR 1 - Instructional Materials - 2nd reading
   j. IIA-AR 2 - Reconsideration of Core Instructional Materials - 2nd reading

Jamie Olsen noted that 2d.(3) is missing the word community.

k. Delete - IIA AR 3 - Challenge Request for Instructional Materials
l. IKF - Graduation Requirements - 2nd reading
m. IKFB - Graduation Exercises - 2nd reading
n. JECA - Admission of Resident Students - 2nd reading
o. JFE AR - Individualized Plan for Pregnant and/or Parenting Students - 2nd reading
p. JHCD - Medications - 2nd reading
q. JHCD-AR - Medications - 2nd reading
r. Delete - JHCD/JHCDA - Medications
s. Delete - JHCD/JHCDA-AR - Medications - 2nd reading

Soren motioned to approve policies 8a - 8s. Deb Lindberg seconded. The Board discussed. Soren Rounds amended his motion to approve policies 8a - 8s with the amendment of 8j. section 2d.(3). carried 5-0. The Board discussed. Motion carried 5-0.

9. **Board Comments**
10. **Future Agenda Items**

Deb Lindberg wants to discuss placing checks and deposits on the agenda.

11. **Key Dates**

President's Day, February 17 - No School

School in Session, February 21

Strategic Planning Meeting, February 26 - 4:15 PM

School Board Meeting, March 11 - 6:00 PM

12. Move to Executive Session 8:01PM

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

12. Return to Regular Session 8:31
13. Adjournment - 8:31

b. Resignation - Stephanie Lewis, Bus Driver
c. Staff Recommendation

# ALSEA SCHOOL DISTRICT 7J

Krista Nieraeth, Superintendent, K – 12 Principal, and Special Education Director
PO Box B * Alsea, Oregon 97324 * 541-487-4305 * Fax 541-487-4089
www.alsea.k12.or.us

March 11, 2025

To: Mrs. Risteen Follett, Chairperson, and the Alsea School District 7J Board of Directors

From: Krista Nieraeth, M.Ed., Superintendent of Schools

Re: Staffing for the 2025 – 2026 School Year

Each year, the building principal and the district superintendent complete the observation and evaluation process in accordance with SB 290 for licensed staff and administrators. During the March board meeting, the board of directors is presented with the recommendations of renewals and extensions, based on the evaluation of the job performance in accordance with ORS 342.513 and ORS 342.845. Once the recommendations are presented and approved, the District must provide notification in writing to staff. This does not promise employment for the upcoming year but does indicate that the employee has met the requirements for the employment.

My recommendations are as follows:

**Administration:**

| **Name:** | **Recommendation** |
|---|---|
| Shunk, Heather | Probationary 3 to Contract |
| Harris, Joseph | Probationary 1 to Probationary 2 |

**Licensed Staff:**

| **Name:** | **Recommendation** |
|---|---|
| Ellis, Catherine | Renew / Extend |
| O'Brien, Mary | Renew / Extend |
| Olsen, Holly | Renew / Extend |
| Pinion, Sandra | Renew / Extend |
| Roberts, Nathan | Renew / Extend |
| Rozboroski, Timothy | Renew / Extend |
| Pearson, Timothy | Renew / Extend |
| Waverek, Courtney | Renew / Extend |
| Dapkus, Ruth | Renew / Extend |
| Naylor, Shannon | Renew / Extend |
| Mason, Renee | Renew / Extend |
| Sederlin, Adam | Renew / Extend |
| Boser, Leslie | Renew / Extend |
| Treadway, Miranda | Probationary 2 to Probationary 3 |
| Evans, Brittni | Probationary 2 to Probationary 3 |
| Schlechter, Jake | Probationary 2 to Probationary 3 |
| Stevens, Seth | Probationary 2 to Probationary 3 |
| Hendrix, Ricki | Probationary 2 to Probationary 3 |

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| | |
|---|---|
| Taylor, Erick | Probationary 2 to Probationary 3 |
| Lynch, David | Probationary 2 to Probationary 3 |
| Shondell, Emilee | Probationary 1 to Probationary 2 |
| VanDerZwan, Nicolaas | Probationary 1 to Probationary 2 |

d. Surplus

# March 2025 Surplus

7 Tables

30 Chairs - Fabric

3. **Patron Comments:**

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

4. **Reports**

a. Superintendent and K-12 Principal Reports

# Alsea School District

## March 2025 Board Meeting Board Report

Krista Nieraeth, Superintendent and Special Education Director

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1. **Transportation**

   We received the results back from our ODE Transportation Audit that was done in October. Our audit overall went well, but it did show that there is a need for us to be more diligent in our employee and vehicle files between Alsea and WLA, as well as to ensure that our policies are updated (which we did in December). Mr. Elbers and I will be meeting with WLA in the coming week to streamline our employee onboarding and filing systems, as well as how to streamline all paperwork processes to ensure compliance with ODE and federal regulations.

2. **Food Service**

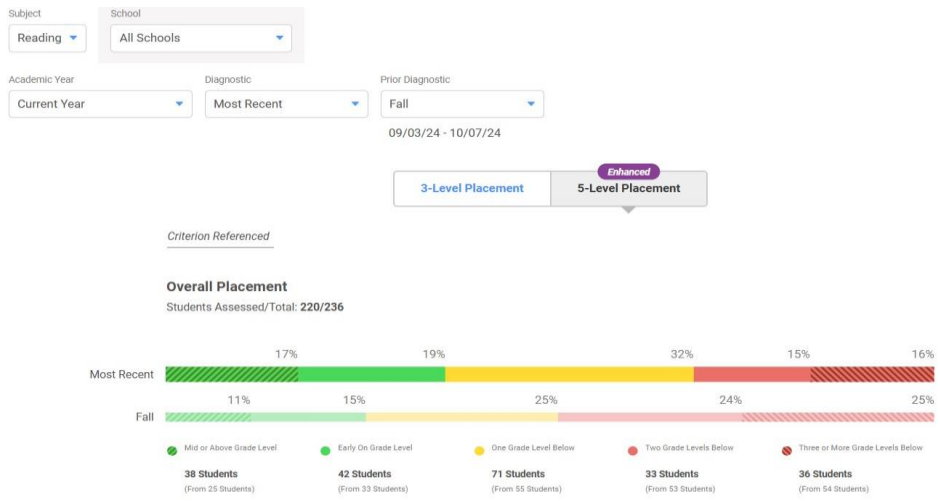
   Mr. Taylor, Mrs. Smallwood, and I are working to plan on how to fully spend the Fresh Fruits and Vegetable Grant by the end of the school year. 10% of the total amount of the grant can go towards equipment for the grant, as well as wages to administer the grant, and then the purchasing of the fresh fruits and vegetables. We have already served rainbow carrots, watermelon radishes, jicama, pomegranates, squash, and purple cauliflower. We will continue this program every week for the rest of the year. Our hope is to also start putting these vegetables on our salad bar for our students at lunchtime.

3. **Grant Budgets**

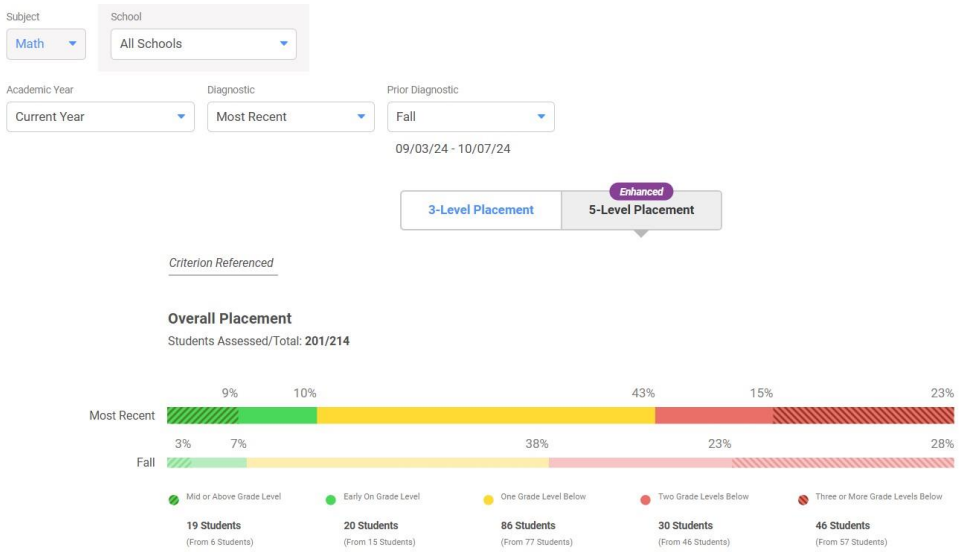
   ODE has released preliminary amounts for the following grants: SIA, HSS, Early Literacy, CSI/TSI, and EIIS. In all grants, because of declining enrollment, we will be decreasing in the amount we are receiving. We are estimating that we are losing approximately 30% of our SIA grant, and 20% of our HSS grant from the preliminary allocations. Our ADM for Early Literacy puts at the floor amount of the grant, which we are already at, and for CSI/TSI, there is a decrease due to ADM. I used the survey results from the fall of our students, the results from our strategic planning survey of our staff, students, families, and community members, and our data to help refine the SIA and HSS budgets to fit priorities and needs to the new budgets.

4. **i – Ready Results for District**

   **Reading**



## Math




## 5. Integrated Guidance Application

The Integrated Guidance application for the 25 – 27 biennium will be open for submission starting March 15th. I've been working with Alex Nalivaiko from LBLESD, who is our IG liaison, to work on the components of this application for submission in April. Alex is currently taking the data from our surveys, empathy interviews, and other data sources and compiling the data to help formulate the answers for our application. Included in this application are the budgets for the HSS, SIA, Early Literacy, CSI/TSI, and EIIS grants, the questions/answers, inventories for our ELA curriculum for grades K – 3, and LGPT goals set in conjunction with ODE.

# Alsea School District

## March 2025 School Board Report – K-12 B&M School

Krista Nieraeth, Principal

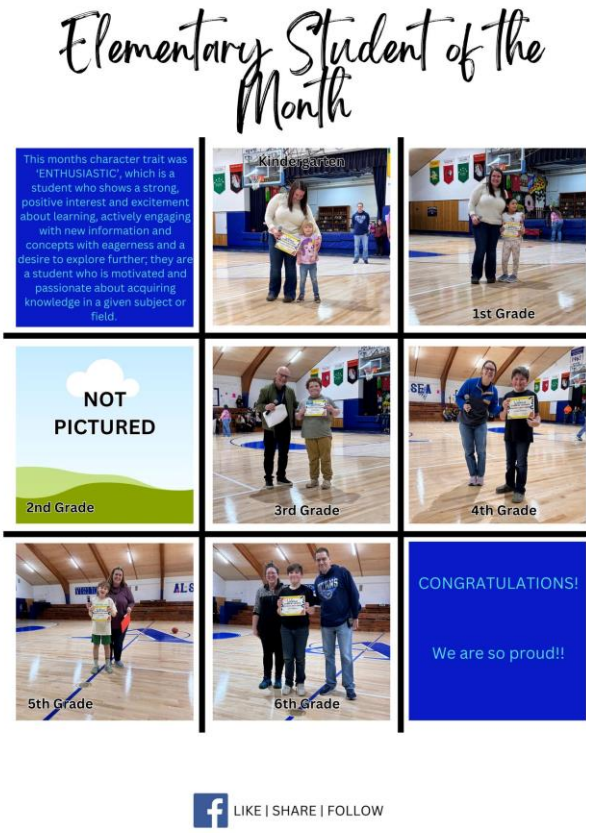
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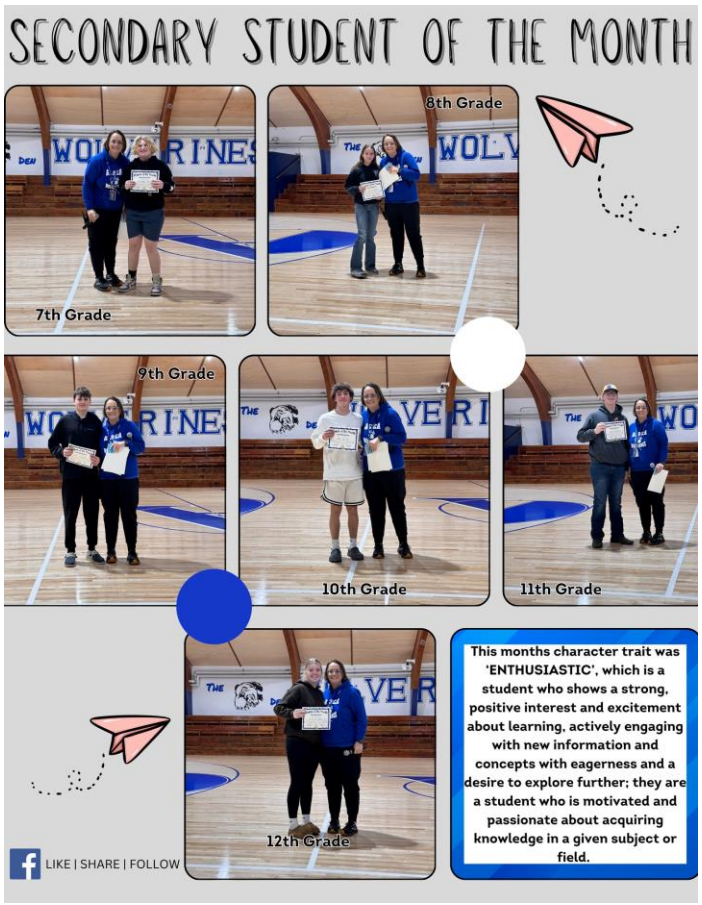
### 1. Students of the Month for January

The character theme of January for students in Grades K – 12 was Enthusiastic.

Congratulations to the following students for being voted as Student of the Month:

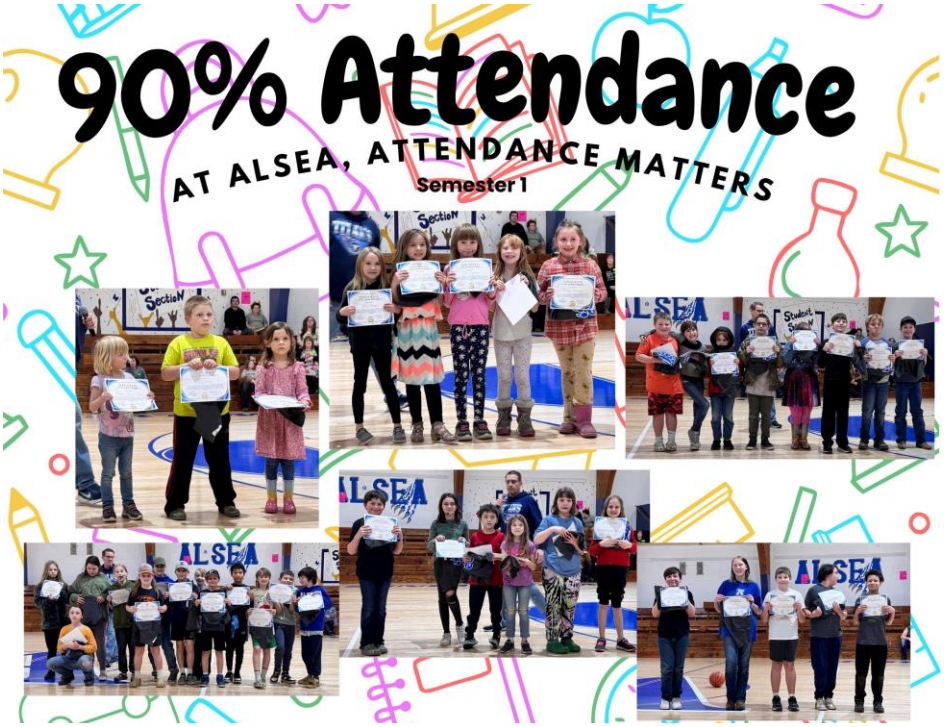
Kinder – Lilianne Johnson - Degner
1st – Celeste Garibay
2nd – Breanna Powell
3rd – River Spence
4th – Ryder Peterson
5th – Gavin Davis
6th – Avik Wamsley
7th – Shyanne Smith
8th – Chloe Pedder
9th – Gage Schubert
10th – Nathan Allen
11th – Cash Mildwater
12th – Shaylyn Noble

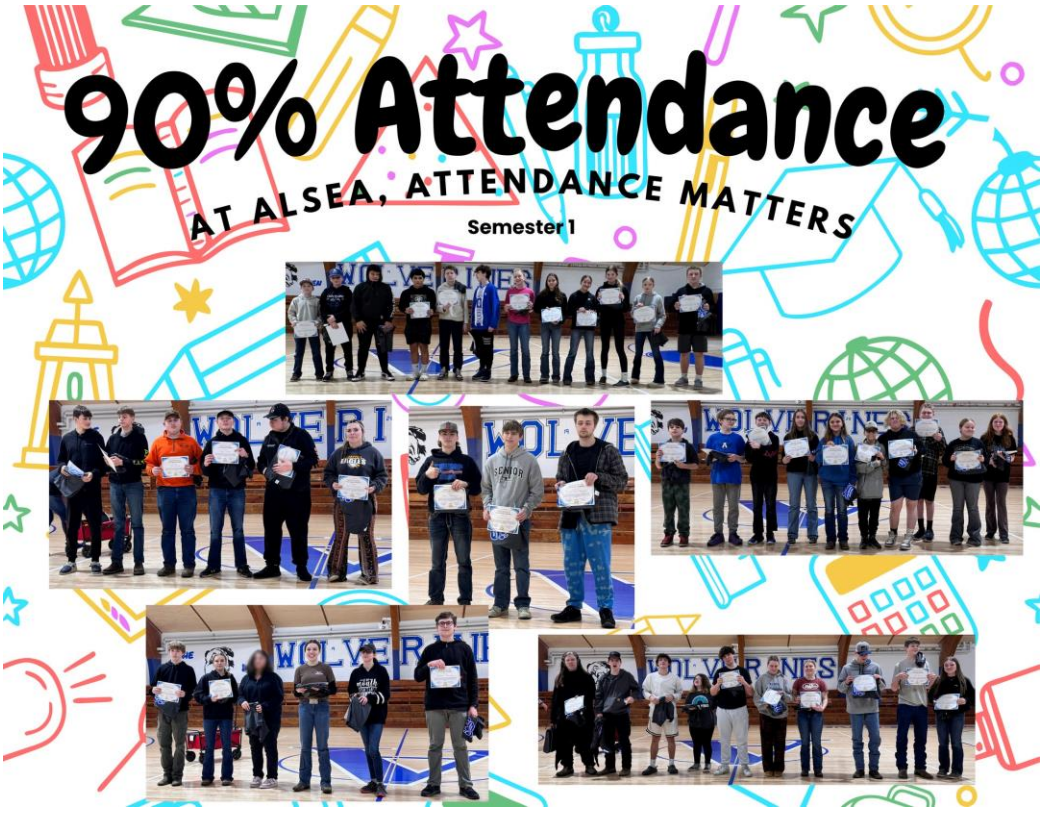


## 2. 90% Attendance Awards

We celebrated those students in grades K – 12 who attended school 90% or more of the time in the 1st semester. We had over 100 students who earned this honor. Each student who attended 90% or more of the time received a t-shirt and a certificate. Congratulations to these students for being regular attenders!!



### 3. Kindergarten/1st Grade Garden



Mrs. Shondell's Kindergarten/1st Grade class is working on creating a class garden!! An educational leader from Davis Family Farms is helping create this opportunity for the class, helping create a composting bin in the classroom, as well as providing seeds for the garden bed. Students were able to go outside to the garden bed and transplant worms to the garden bed for fertilization, as well as plant seeds.

### 4. CPI Washington D.C. Tour Winner

Congratulations to Paisley Jacobsen for being chosen to participate as CPI's student representative for the Electrical Co-op Youth Tour this summer in Washington D.C. Paisley was chosen as the representative after an application and interview process. Congratulations to Paisley!

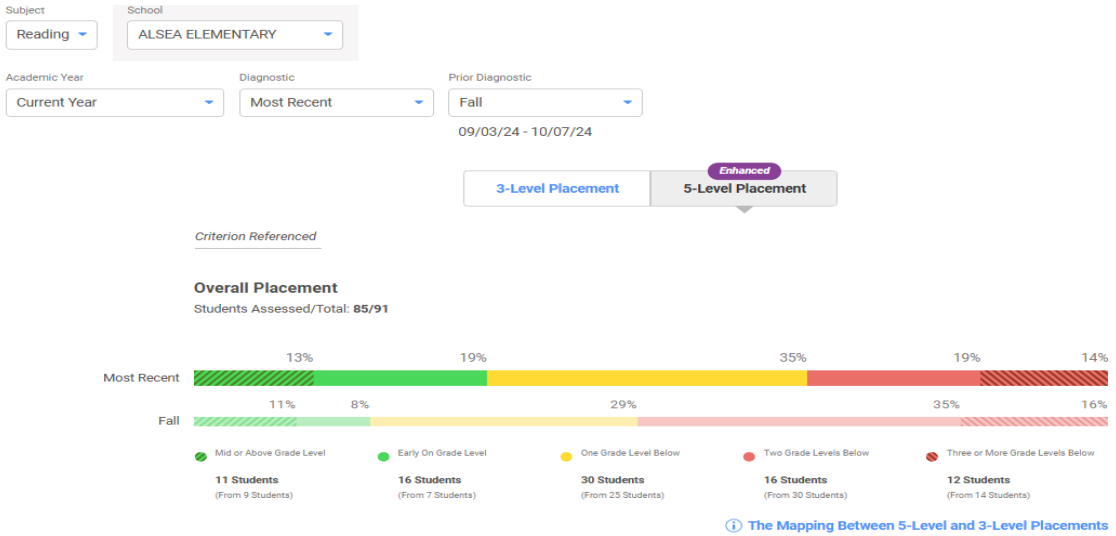
### 5. Career Fair

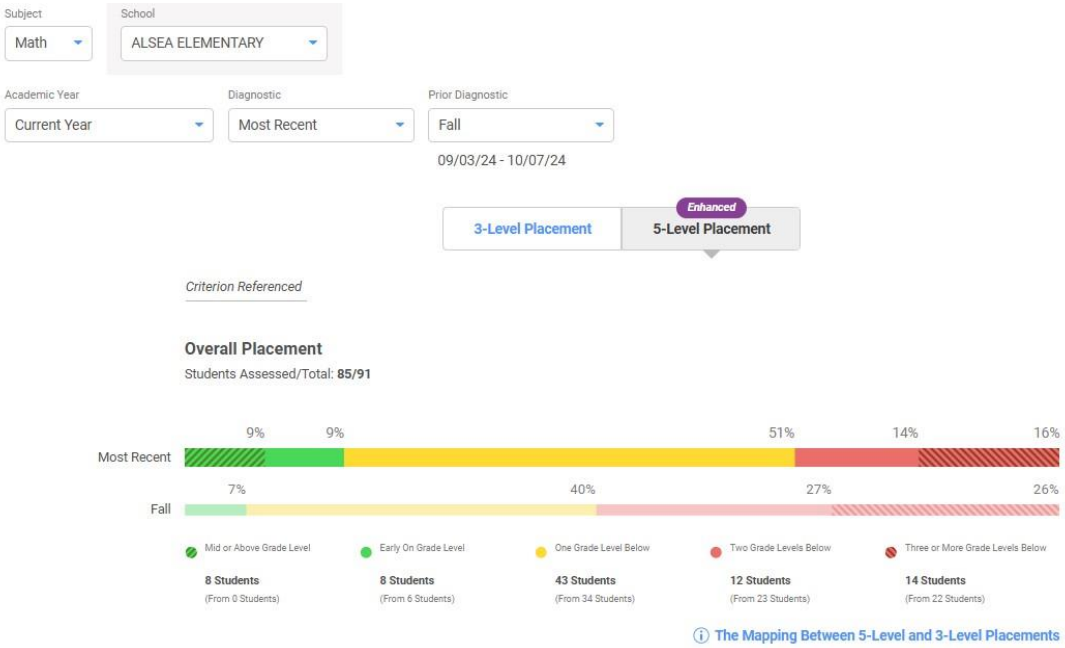
Six of our Juniors and Seniors attended the Career Fair at OSU that was put on by the Corvallis School District on Tuesday, March 4th. Over 700 students attended this event, where there were over 50 different careers and college represented. Students were able to also participate in mock interviews with local professionals throughout the region. We are looking at integrating this event into our Careers and English classes next year to ensure that ALL of our juniors and seniors attend this important event. We are also looking at bringing some of the presenters out to Alsea present in our classes and help our students make those important connections about the possibilities that are there after high school.



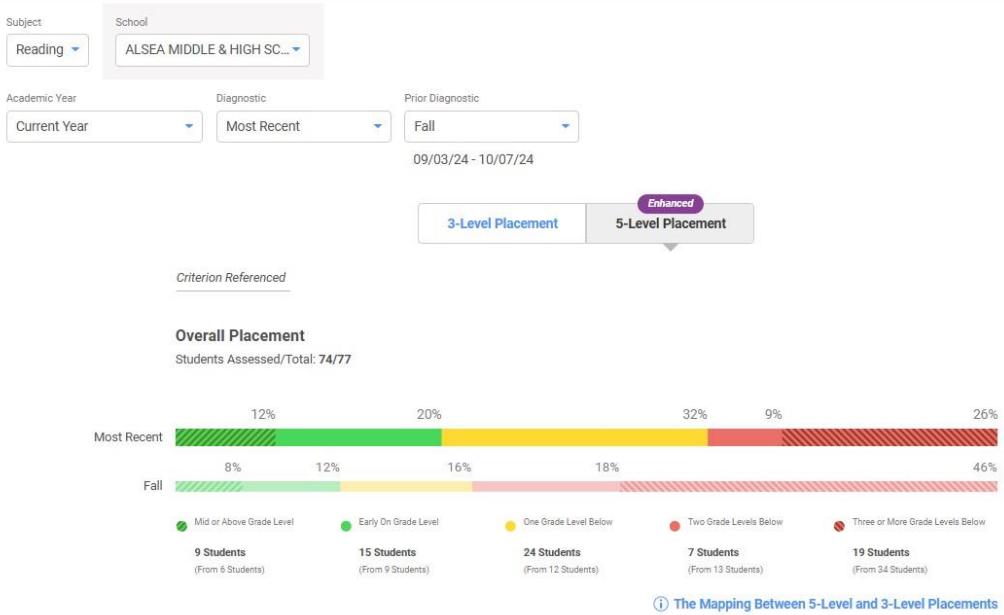
6. **Alsea Brick and Mortar i – Ready results**

# Alsea Elementary School



# Alsea Middle and High School



Subject: Math

School: ALSEA MIDDLE & HIGH SC...

Academic Year: Current Year

Diagnostic: Most Recent

Prior Diagnostic: Fall

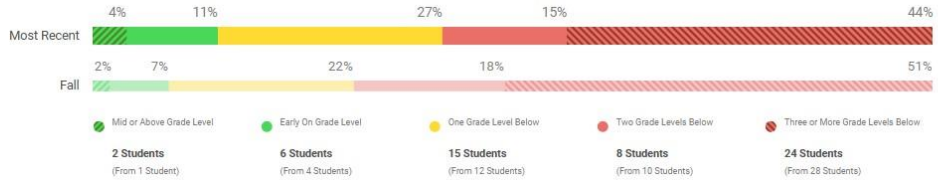
09/03/24 - 10/07/24

3-Level Placement | Enhanced 5-Level Placement

*Criterion Referenced*

## Overall Placement

Students Assessed/Total: **55/55**




| Mid or Above Grade Level | Early On Grade Level | One Grade Level Below | Two Grade Levels Below | Three or More Grade Levels Below |
|---|---|---|---|---|
| **2 Students** (From 1 Student) | **6 Students** (From 4 Students) | **15 Students** (From 12 Students) | **8 Students** (From 10 Students) | **24 Students** (From 28 Students) |

i. Regular Attenders and Enrollment

# REGULAR ATTENDERS

## >90% Positive Attendance

| Grade Level | Enrollment # | 01-Oct | Enrollment # | 01-Nov | Enrollment # | 01-Dec | Enrollment # | 01-Jan | Enrollment # | 01-Feb | Enrollment # | 01-Mar | Enrollment # | 01-Apr | Enrollment # | 01-May | Enrollment # | 01-Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| KG | 14 | 64.29% | 12 | 83.33% | 13 | 61.53% | 13 | 61.53% | 14 | 64.28% | 13 | 53.84% | | | | | | |
| 1st | 13 | 92.31% | 13 | 61.53% | 12 | 50.00% | 12 | 41.66% | 13 | 38.46% | 12 | 41.67% | | | | | | |
| 2nd | 33 | 78.78% | 33 | 78.78% | 33 | 69.69% | 33 | 69.69% | 32 | 75.00% | 30 | 83.33% | | | | | | |
| 3rd | 32 | 81.25% | 31 | 80.64% | 31 | 74.19% | 31 | 74.19% | 31 | 70.97% | 31 | 74.19% | | | | | | |
| 4th | 24 | 62.50% | 22 | 63.63% | 23 | 60.86% | 22 | 50.00% | 23 | 69.57% | 24 | 58.33% | | | | | | |
| 5th | 26 | 73.07% | 26 | 80.76% | 28 | 67.85% | 27 | 62.96% | 30 | 60.00% | 29 | 51.72% | | | | | | |
| 6th | 17 | 70.59% | 17 | 58.82% | 16 | 43.75% | 16 | 37.50% | 17 | 35.29% | 17 | 41.18% | | | | | | |
| 7th | 17 | 82.35% | 17 | 76.47% | 17 | 70.58% | 17 | 64.71% | 16 | 62.50% | 16 | 62.50% | | | | | | |
| 8th | 15 | 80.00% | 15 | 80.00% | 15 | 80.00% | 16 | 62.50% | 16 | 81.25% | 16 | 68.75% | | | | | | |
| 9th | 11 | 54.54% | 10 | 50.00% | 10 | 50.00% | 10 | 50.00% | 10 | 60.00% | 10 | 50.00% | | | | | | |
| 10th | 16 | 93.75% | 16 | 81.25% | 16 | 81.25% | 16 | 75.00% | 16 | 68.75% | 16 | 68.75% | | | | | | |
| 11th | 10 | 70.00% | 10 | 70.00% | 10 | 60.00% | 10 | 60.00% | 10 | 60.00% | 10 | 60.00% | | | | | | |
| 12th | 11 | 36.36% | 11 | 45.45% | 11 | 36.36% | 11 | 36.36% | 11 | 36.36% | 11 | 45.45% | | | | | | |
| **Schoolwide** | **239** | **72.29%** | **233** | **70.05%** | **235** | **62.00%** | **234** | **57.39%** | **239** | **60.19%** | **235** | **58.44%** | **0** | **#DIV/0!** | **0** | **#DIV/0!** | **0** | **#DIV/0!** |

| Grade Level | 2024-2025 SY | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 9/1 | 10/1 | 11/1 | 12/1 | 1/1 | 2/1 | 3/1 | 4/1 | 5/1 | 6/1 |
| KG | 13 | 14 | 12 | 13 | 13 | 14 | 13 | | | |
| 1st | 13 | 13 | 13 | 12 | 12 | 13 | 12 | | | |
| 2nd | 32 | 33 | 33 | 33 | 33 | 32 | 30 | | | |
| 3rd | 32 | 32 | 31 | 31 | 31 | 31 | 31 | | | |
| 4th | 24 | 24 | 22 | 23 | 22 | 23 | 24 | | | |
| 5th | 25 | 26 | 26 | 28 | 27 | 30 | 29 | | | |
| 6th | 17 | 17 | 17 | 16 | 16 | 17 | 17 | | | |
| 7th | 17 | 17 | 17 | 17 | 17 | 16 | 16 | | | |
| 8th | 15 | 15 | 15 | 15 | 16 | 16 | 16 | | | |
| 9th | 11 | 11 | 10 | 10 | 10 | 10 | 10 | | | |
| 10th | 16 | 13 | 16 | 16 | 16 | 16 | 16 | | | |
| 11th | 11 | 10 | 10 | 10 | 10 | 10 | 10 | | | |
| 12th | 11 | 11 | 11 | 11 | 11 | 11 | 11 | | | |
| Total ADM | 237 | 236 | 233 | 235 | 234 | 239 | 235 | 0 | 0 | 0 |

| | 2023-2024 SY | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 9/1 | 10/1 | 11/1 | 12/1 | 1/1 | 2/1 | 3/1 | 4/1 | 5/1 | 6/1 |
| KG | 19 | 18 | 18 | 16 | 16 | 16 | 17 | 17 | 16 | 16 |
| 1st | 35 | 42 | 39 | 39 | 39 | 40 | 40 | 39 | 39 | 39 |
| 2nd | 35 | 36 | 36 | 37 | 37 | 37 | 37 | 37 | 37 | 35 |
| 3rd | 28 | 32 | 30 | 29 | 29 | 28 | 28 | 27 | 25 | 26 |
| 4th | 24 | 25 | 26 | 25 | 25 | 25 | 24 | 24 | 24 | 24 |
| 5th | 23 | 24 | 26 | 25 | 25 | 24 | 21 | 21 | 18 | 18 |
| 6th | 13 | 13 | 12 | 12 | 12 | 12 | 13 | 13 | 15 | 15 |
| 7th | 18 | 20 | 19 | 19 | 18 | 17 | 17 | 17 | 17 | 17 |
| 8th | 13 | 13 | 13 | 13 | 13 | 13 | 13 | 13 | 13 | 12 |
| 9th | 20 | 22 | 22 | 23 | 23 | 22 | 20 | 17 | 16 | 16 |
| 10th | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 11 | 11 |
| 11th | 13 | 14 | 13 | 14 | 14 | 14 | 13 | 13 | 13 | 13 |
| 12th | 13 | 11 | 10 | 10 | 10 | 10 | 10 | 8 | 8 | 8 |
| Total ADM | 266 | 282 | 276 | 274 | 273 | 270 | 265 | 258 | 252 | 250 |

| | 2022-2023 SY | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 9/1 | 10/1 | 11/1 | 12/1 | 1/1 | 2/1 | 3/1 | 4/1 | 5/1 | 6/1 |
| KG | 58 | 62 | 60 | 61 | 60 | 56 | 55 | 53 | 50 | 49 |
| 1st | 56 | 66 | 64 | 66 | 64 | 60 | 60 | 58 | 54 | 53 |
| 2nd | 42 | 41 | 41 | 45 | 43 | 38 | 36 | 35 | 32 | 30 |
| 3rd | 43 | 50 | 54 | 53 | 51 | 46 | 46 | 46 | 45 | 44 |
| 4th | 37 | 41 | 47 | 47 | 47 | 43 | 42 | 40 | 39 | 39 |
| 5th | 29 | 32 | 36 | 36 | 36 | 29 | 29 | 26 | 24 | 23 |
| 6th | 35 | 45 | 49 | 49 | 46 | 43 | 37 | 34 | 34 | 33 |
| 7th | 44 | 59 | 59 | 61 | 59 | 56 | 56 | 52 | 48 | 41 |
| 8th | 41 | 51 | 53 | 52 | 50 | 44 | 42 | 42 | 41 | 39 |
| 9th | 14 | 14 | 13 | 13 | 12 | 12 | 12 | 12 | 13 | 12 |
| 10th | 17 | 16 | 16 | 16 | 16 | 15 | 15 | 14 | 14 | 13 |
| 11th | 21 | 21 | 21 | 22 | 20 | 20 | 20 | 19 | 17 | 17 |
| 12th | 25 | 24 | 22 | 22 | 21 | 20 | 20 | 15 | 14 | 14 |
| Total ADM | 462 | 522 | 535 | 543 | 525 | 482 | 470 | 446 | 425 | 407 |

| ENROLLMENT | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Grade** | **In building/ LaHO** | **K** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **TOTAL** |
| As of 9/1/24 | In building | 5 | 8 | 13 | 11 | 15 | 19 | 17 | 17 | 15 | 11 | 16 | 11 | 11 | **169** |
| As of 9/1/24 | Learn at Home | 8 | 5 | 19 | 21 | 9 | 6 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **68** |
| As of 9/1/24 | **TOTAL** | **13** | **13** | **32** | **32** | **24** | **25** | **17** | **17** | **15** | **11** | **16** | **11** | **11** | **237** |
| | | | | | | | | | | | | | | | |
| As of 10/1/24 | In building | 5 | 8 | 14 | 11 | 15 | 20 | 17 | 17 | 15 | 11 | 16 | 9 | 11 | **169** |
| As of 10/1/24 | Learn at Home | 9 | 5 | 18 | 20 | 9 | 6 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **67** |
| As of 10/1/24 | **TOTAL** | **14** | **13** | **32** | **31** | **24** | **26** | **17** | **17** | **15** | **11** | **16** | **9** | **11** | **236** |
| | | | | | | | | | | | | | | | |
| As of 11/1/24 | In building | 5 | 8 | 14 | 11 | 14 | 20 | 17 | 17 | 15 | 10 | 16 | 10 | 11 | **168** |
| As of 11/1/24 | Learn at Home | 7 | 5 | 19 | 20 | 8 | 6 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **65** |
| As of 11/1/24 | **TOTAL** | **12** | **13** | **33** | **31** | **22** | **26** | **17** | **17** | **15** | **10** | **16** | **10** | **11** | **233** |
| | | | | | | | | | | | | | | | |
| As of 12/1/24 | In building | 6 | 7 | 14 | 11 | 14 | 21 | 16 | 17 | 15 | 10 | 16 | 10 | 11 | **168** |
| As of 12/1/24 | Learn at Home | 7 | 5 | 19 | 20 | 9 | 7 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **67** |
| As of 12/1/24 | **TOTAL** | **13** | **12** | **33** | **31** | **23** | **28** | **16** | **17** | **15** | **10** | **16** | **10** | **11** | **235** |
| | | | | | | | | | | | | | | | |
| As of 01/01/25 | In building | 6 | 7 | 14 | 11 | 14 | 21 | 16 | 17 | 16 | 10 | 16 | 10 | 11 | **169** |
| As of 01/01/25 | Learn at Home | 7 | 5 | 19 | 20 | 8 | 6 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **65** |
| As of 01/01/25 | **TOTAL** | **0** | **12** | **33** | **31** | **22** | **27** | **16** | **17** | **16** | **10** | **16** | **10** | **11** | **234** |
| | | | | | | | | | | | | | | | |
| As of 02/1/25 | In building | 7 | 7 | 13 | 12 | 14 | 22 | 17 | 16 | 16 | 10 | 16 | 10 | 11 | **171** |
| As of 02/1/25 | Learn at Home | 7 | 6 | 19 | 19 | 9 | 8 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **68** |
| As of 02/1/25 | **TOTAL** | **14** | **13** | **32** | **31** | **23** | **30** | **17** | **16** | **16** | **10** | **16** | **10** | **11** | **239** |
| | | | | | | | | | | | | | | | |
| As of 03/01/25 | In building | 6 | 7 | 12 | 12 | 14 | 21 | 17 | 16 | 16 | 10 | 16 | 10 | 11 | **168** |
| As of 03/01/25 | Learn at Home | 7 | 5 | 18 | 19 | 10 | 8 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **67** |
| As of 03/01/25 | **TOTAL** | **13** | **12** | **30** | **31** | **24** | **29** | **17** | **16** | **16** | **10** | **16** | **10** | **11** | **235** |
| | | | | | | | | | | | | | | | |
| As of 04/01/25 | In building | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| As of 04/01/25 | Learn at Home | 0 | 0 | 0 | 0 | 0 | 0 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| As of 04/01/25 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 05/01/25 | In building | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| As of 05/01/25 | Learn at Home | 0 | 0 | 0 | 0 | 0 | 0 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| As of 05/01/25 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| | | | | | | | | | | | | | | | |
| As of 06/01/25 | In building | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| As of 06/01/25 | Learn at Home | 0 | 0 | 0 | 0 | 0 | 0 | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| As of 06/01/25 | **TOTAL** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |

b. K-5 LaHO Principal Report

# ALSEA SCHOOL DISTRICT BOARD REPORT

## **Name:** Heather Shunk **Position:** Principal

### BOARD MEETING DATE: February 10, 2025




[Link for February 2025 Assembly Slide Deck -](#) Attendance, Birthdays, Students of the Month, Superhero Appreciation, Happenings in Each Class, and Exploratory Class, February character trait "DARING"

**February 2025 Assembly** - Students invited a special Superhero in their life to participate in the assembly and receive recognition and appreciation. Each class created thoughtful invitations and a beautiful poem to celebrate and acknowledge the hard work of being a superhero. This was incredibly special for our community.



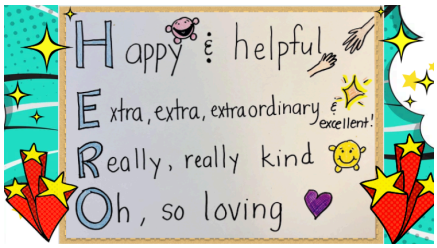


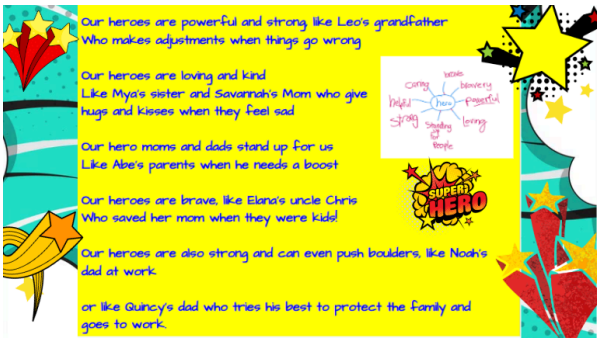


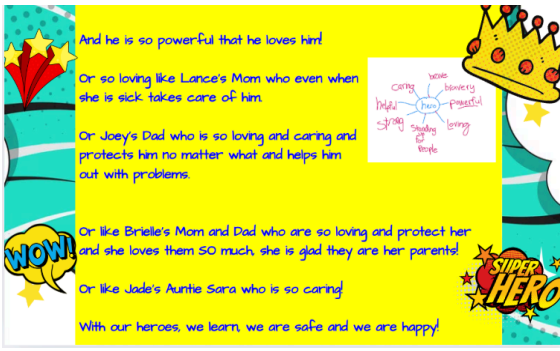






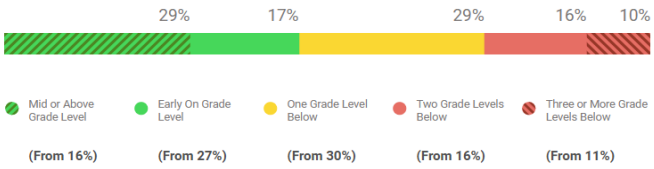


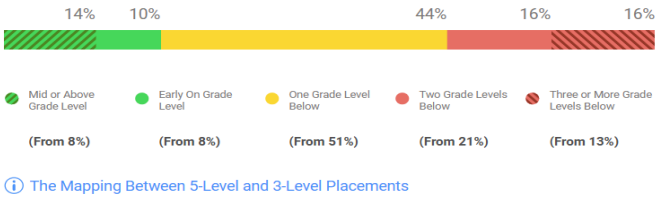




## I-Ready Current Placement

### Reading :

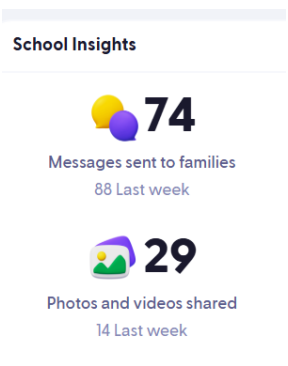


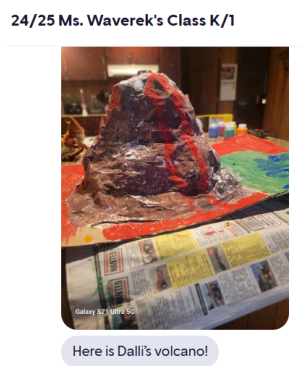

### Math:

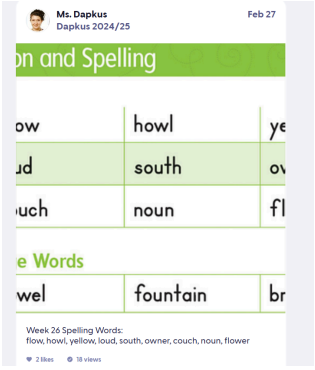


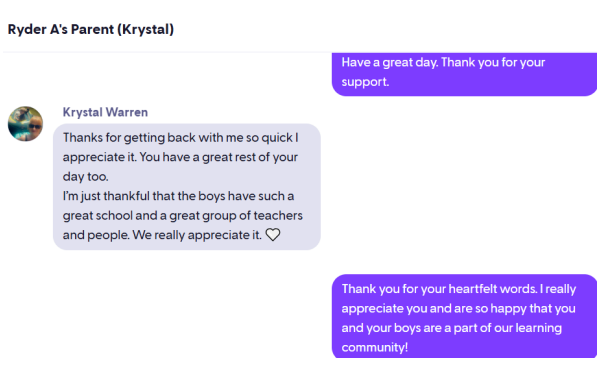

## Transparent & Supportive School-Home Communication

Our team is committed to maintaining clear, frequent, and supportive communication between school and home to ensure that learning coaches and parents are active partners in student success. Through regular check-ins, progress updates, and open dialogue, we provide families with the tools and information needed to support academic growth. By working collaboratively, we create a strong learning network that empowers students to reach their full potential.



c. Athletics and Activities

Board Report – 3/11/25

Summary:

The Alsea Project Update: On March 6th our committee met and worked on our school wide expectations and the descriptors for the different areas of our school. We are already planning for next year and the implementation of the school wide support. Part of the PBIS philosophy is rewarding students, so we are wanting to put together a small school store where students can redeem their PRIDE tickets each week. If anyone wants to make donations to our efforts, please contact the school. Any fun prizes would be welcomed.

Our next meeting will be Friday, 3/21/25. This is a grading day, and we will use some of the day to put all our expectations together and work to formalize our process/procedures for PBIS.

We have completed another season of basketball. Our students should be proud of their accomplishments. The boys' first round playoff game didn't go the way we hoped but was a good experience for them to play a top-rated team in the state. We are looking forward to fielding both girls' and boys' basketball at Alsea next year.

Track practice started last week. We have a couple of HS students representing and we have approximately 20 MS students representing this year. We look forward to their success this year.

After school enrichment classes have started. Students can choose from culinary, clay art, Choir, and dance. Students have been producing some great products in these after school classes.

If you have any questions or concerns, please contact me directly.

d. Business Manager Report

Financial Summary – February 28, 2025

General Fund Resources

- State School Support – The ODE updated both the 23-24 and 24-25 Average Daily Membership weighted ("ADMw"). The new projections (Page 4) provided an additional 60 ADMw compared to the prior estimate. This increase is due to additional IEPs over the 11% (23 ADMw) and Remote Elementary (39 ADMw), with minor reductions in other areas. The Remote Elementary ADMw is formula driven and provided to schools that are less than 252 elementary students. Alsea SD met this requirement in 23-24 but due to the 22-23 ADMw still greater than the 23-24 ADMw, it had no impact on the SSF allocation. However, the additional ADMw does have an impact on the 24-25 SSF allocation, which included an increase of approximately 60 ADMw. The increase represents an additional $539,529 compared to last month's financial statements. Please keep in mind, these are estimates and note final figures for 23-24 or 24-25. The final figures for 23-24 will not be available until May, with the 24-25 still an estimate.
- Property taxes – the statements reflect tax turnover through January 31. Property taxes, except for November, are posted the subsequent month when received by the county treasurer. 95.5% of the current levy has been received.
- 1312 – Tuition from Other Districts – payment for students attending the Learn at Home Online that are residents of another district and reported by that district to the ODE for funding purposes.
- 1510 - Earnings on investments – The earnings rate with the Local Government Investment Pool (LGIP) is 4.70%, down from 4.75% for the prior month. The district is earning approximately $30,000 per month. The interest earned is allocated to various funds based on that fund's cash balance as of the end of the month and the investment pool interest rate.
- 5300 – Insurance Reimbursement – the district received $18,788 for the repair of the football field. The district will still be receiving funds from the insurance company on the field repair. The deductible is $1,000.
- No changes in the other revenues.

General Fund Expenditures

- All salaries and benefits have been encumbered, as well as projections for substitutes and additional salaries are included in the financial statements. The substitute and additional salaries are based on the average for September through January and annualized through June.
- In other requirements, a transfer to the Special Revenue Fund for Special Education Stipends has been projected. The grant covers only the stipend amount, not associated payroll costs. The district is required to pay all payroll costs associated with the grant.

Special Revenue

Changes

- No new grants or changes to existing grants and programs compared to last month.

Food Service Program

- Included are the student participation, financial statements and per meal breakdown through 2/28/25. The attached statement reflects the participation by month, with the annual participation at 66.9% for the breakfast program; 65.2%, lunch program.
- The projected transfer from the General Fund will be approximately $58,281.82. The average cost per meal is $5.83 while reimbursement is $4.13, or a transfer from the General Fund of $1.70 per meal.
- The district received the first quarter payment from the ODE for the 10% reimbursement increase. The estimated increase is $5,700, which has been included in the statements and the reason for the decrease in the transfer from the General Fund.

Debt Service

- As with the General Fund, 95.5% of the levy has been received.
- The ending projected fund balance is estimated at $30,000.

Capital Projects

- 400 – Capital Projects - reflects interest received on monies at the LGIP. Expenditures are the replacement of the windows, architectural services for the kitchen, and the upgrade to the fire alarm system. The fund has $85,393 available for additional projects.
- 410 - Bond 2021 and OSCIM Grant –The fund has $54,840, which includes the upgrade to the HVAC for the data server closet.
- 430 – Seismic Rehabilitation – represents approved service contracts. The district has received the first two payments from the Oregon Business Development Department. Per the grant, claims will be made after each month's end.

Internal Service Funds

Unemployment Reserve

- Currently the district is charging all salaries approximately 4% on each payroll and transferring the funds into the Unemployment Reserve Fund to cover quarterly unemployment claims. The $6,800 represents claims for the first two quarters of 24-25. However, it is still unknown what the costs will be for Spring and Summer breaks.
- The current balance to cover future claims is $141,302.

PERS Reserve

- A new fund has been created dedicated to cover increases in PERS costs. A payroll liability account for prior PERS expenses has been on the books. These funds have been transferred to the new fund to properly reflect the dollars. Interest earned on these funds is also being recorded, as with other funds that have available funds in the investment pool.

## Alsea School District 7J
## State School Support Formula Estimate

| | ODE | 23-24 2/21/2025 | | Budget | | 24-25 1/31/2025 Financial Statements | 2/21/2025 | Change | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Weight | ODE | | Total | ADMw | | ODE | | | |
| ADMr | 1.00 | 265.48 | 265.48 | 295.00 | 295.00 | 234.50 | 222.13 | | | |
| ESL | 0.50 | 6.84 | 3.42 | 8.00 | 4.00 | 4.00 | 1.69 | | | |
| Pregnant and Parenting | 1.00 | - | - | | - | | | | | |
| IEP | 1.00 | 29.20 | 29.20 | 42.00 | 32.45 | 25.80 | 24.43 | | | |
| IEPs above 11% | 1.00 | 25.40 | 25.40 | 2.30 | 2.30 | 2.30 | 25.40 | | | |
| Students in Poverty | 0.25 | 29.00 | 7.25 | 29.00 | 7.25 | 7.25 | 7.26 | | | |
| Foster Care | 0.25 | 1.00 | 0.25 | 1.00 | 0.25 | | | | | |
| Remote Elementary | 1.00 | 38.82 | 38.82 | | - | | 38.82 | | | |
| Small High School | 1.00 | 50.46 | 50.46 | 53.86 | 53.86 | 47.26 | 50.46 | | | |
| Total ADMw | | 446.20 | 420.28 | 431.16 | 395.11 | 321.11 | 370.19 | | | |
| Prior Yrs ADMw | | | 613.44 | | | 360.82 | 420.28 | | | |
| Greater ADMw Amt between Yrs | | | **613.44** | | **395.11** | **360.82** | **420.28** | **59.46** | | |
| Base Amount | | | $ 4,500.00 | | $ 4,500.00 | $ 4,500.00 | $ 4,500.00 | | | |
| Teacher Experience Base Amount | | | $ 25.00 | | $ 25.00 | $ 25.00 | $ 25.00 | | | |
| Experience | | | (2.30) | | (2.30) | (2.30) | (5.06) | | | |
| Teacher Experience Amount | | | (57.50) | | (57.50) | (57.50) | (126.50) | | | |
| Total Base Amount | | | $ 4,442.50 | | $ 4,442.50 | $ 4,442.50 | $ 4,373.50 | | | |
| Ratio | | | 2.24088649993 | | 2.34088952892 | 2.33970839042 | 2.34144792179 | | | |
| State School Funding Per ADMw | | | **$ 9,955.14** | | **$ 10,399.40** | **$ 10,394.15** | **$ 10,240.32** | **$ (153.83)** | **Add'l ADMw** | **$ 608,889** |
| | | | | | | | | | **Teacher Exp** | **$ (55,475)** |
| General Purpose Grant | | | **$ 6,106,831** | | **$ 4,108,907** | **$ 3,750,417** | **$ 4,303,831** | **$ 553,414** | | **$ 553,414** |
| **Transportaiton** | | | 946,676.00 | | 1,100,000.00 | 1,015,427.45 | 1,000,000.00 | | | |
| Percent | | | 90% | | 90% | 90% | 90% | | | |
| Transportation Grant | | | **$ 852,008.00** | | **$ 990,000.00** | **$ 913,885.00** | **$ 900,000.00** | **$ (13,885)** | | |
| Rounding | | | | | | | | | | |
| Total Formula Revenue | | | **$ 6,958,839** | **$ 5,930** | **$ 5,098,907** | **$ 4,664,302** | **$ 5,203,831** | **$ 539,529** | | |
| **Less Local Collections** | | | | | | | | | | |
| Property Taxes | | | 511,796 | (11,796) | 530,000 | 530,000 | 530,000 | **$ -** | | |
| Common School | | | 51,631 | - | 41,205 | 41,276 | 40,053 | **$ (1,223)** | | |
| County School | | | - | | - | - | - | | | |
| Federal Forest Fees | | | - | | - | - | - | | | |
| Total Local Offsets | | | **563,427** | **(11,796)** | **571,205** | **571,276** | **570,053** | **$ (1,223)** | | |
| **State School Support Payments** | | | **$ 6,395,412** | **$ (5,866)** | **$ 4,527,702** | **$ 4,093,026** | **$ 4,633,778** | **$ 540,752** | | |

**GENERAL FUND**
**STATEMENT OF RESOURCES**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

| LINE | | SOURCE | BUDGET | Y-T-D 2/28/2025 | PROJECTED | TOTAL 2/28/2025 | BALANCE OVER/(UNDER) |
|---|---|---|---|---|---|---|---|
| | | **STATE SCHOOL SUPPORT FORMULA** | | | | | |
| 1 | 1111 | CURRENT YEAR'S TAXES | **$ 528,200.00** | $ 504,887.91 | 19,104.35 | **$ 523,992.26** | **$ (4,207.74)** |
| 2 | 1112 | PRIOR YEAR'S TAXES | **1,000.00** | (608.37) | 5,808.12 | **5,199.75** | **4,199.75** |
| 3 | 1114 | OTHER TAXES | **-** | 7.99 | - | **7.99** | **7.99** |
| 4 | 1190 | INTEREST ON TAX COLLECTIONS | **800.00** | 371.21 | 428.79 | **800.00** | **-** |
| 5 | 2101 | COUNTY SCHOOL FUND | **-** | - | | **-** | **-** |
| 6 | 3103 | COMMON SCHOOL FUND | **41,205.00** | 20,026.41 | 20,026.41 | **40,052.82** | **(1,152.18)** |
| 7 | 3101 | STATE SCHOOL SUPPORT FUND | **4,527,702.00** | 3,571,344.00 | 1,062,434.18 | **4,633,778.18** | **106,076.18** |
| 8 | 4801 | FEDERAL FOREST FEES | **-** | - | - | **-** | **-** |
| 9 | | **TOTAL 2024-25 SSSF SOURCES (Line 1 - Line 8)** | **5,098,907.00** | **4,096,029.15** | **1,107,801.85** | **5,203,831.00** | **104,924.00** |
| | | **STATE SCHOOL SUPPORT FORMULA (Prior Yr Adjustments)** | | | | | |
| 10 | | STATE SCHOOL SUPPORT FUND 23-24 | | **-** | **(5,866.00)** | **(5,866.00)** | **(5,866.00)** |
| 11 | | HIGH COST GRANT | | | | **-** | **-** |
| 12 | | **TOTAL SSSF PRIOR YR ADJ (Line 10 - Line 11)** | **-** | **-** | **(5,866.00)** | **(5,866.00)** | **(5,866.00)** |
| 13 | | **TOTAL SSSF SOURCES (Line 9 + Line 12)** | **5,098,907.00** | **4,096,029.15** | **1,101,935.85** | **5,197,965.00** | **99,058.00** |
| | | **NON STATE SCHOOL SUPPORT FORMULA SOURCES** | | | | | |
| | | **LOCAL SOURCES** | | | | | |
| 14 | 1312 | TUITION FROM OTHER DISTRICTS | **-** | 4,362.15 | - | **4,362.15** | **4,362.15** |
| 15 | 1510 | EARNINGS ON INVESTMENTS | **50,000.00** | 262,455.61 | 77,544.39 | **340,000.00** | **290,000.00** |
| 16 | 1710 | ADMISSIONS - GATE FEES | **7,500.00** | 3,271.75 | 4,228.25 | **7,500.00** | **-** |
| 17 | 1760 | FUND RAISING | **-** | - | - | **-** | **-** |
| 18 | 1910 | RENTAL INCOME | **3,600.00** | 3,072.00 | 528.00 | **3,600.00** | **-** |
| 19 | 1943 | SERVICES PROVIDED CHARTER SCHOOLS | **72,198.00** | 36,902.23 | 35,295.77 | **72,198.00** | **-** |
| 20 | 1960 | RECOVER PRIOR YEAR'S EXPENDITURES | **-** | - | - | **-** | **-** |
| 21 | 1920 | DONATIONS | **-** | 2,000.00 | - | **2,000.00** | **2,000.00** |
| 22 | 1980 | FEES CHARGED OTHER GRANTS | **-** | - | - | **-** | **-** |
| 23 | 1990 | MISCELLANEOUS REVENUE | **24,800.00** | 13,597.60 | | **13,597.60** | **(11,202.40)** |
| 24 | | **TOTAL LOCAL SOURCES (Line 14 - Line 23)** | **158,098.00** | **325,661.34** | **117,596.41** | **443,257.75** | **285,159.75** |
| | | **OTHER SOURCES** | | | | | |
| 25 | 2102 | REVENUE THROUGH ESD | **7,600.00** | 3,513.52 | 3,513.52 | **7,027.04** | **(572.96)** |
| 26 | 2199 | OTHER INTERMEDIATE SOURCES | **-** | - | - | **-** | **-** |
| 27 | 3203 | SPECIAL EDUCATION PROGRAMS | **-** | - | - | **-** | **-** |
| 28 | 5300 | INSURANCE REIMBURSEMENT | **-** | 25,389.73 | - | **25,389.73** | **25,389.73** |
| 29 | 5400 | BEGINNING CASH | **6,700,000.00** | 6,716,065.45 | | **6,716,065.45** | **16,065.45** |
| 30 | | **TOTAL OTHER SOURCES (Line 25 - Line 29)** | **6,707,600.00** | **6,744,968.70** | **3,513.52** | **6,748,482.22** | **40,882.22** |
| 31 | | **TOTAL NON SSSF SOURCES (Line 24 + Line 30)** | **6,865,698.00** | **7,070,630.04** | **121,109.93** | **7,191,739.97** | **326,041.97** |
| 32 | | **TOTAL RESOURCES (Line 13 + Line 31)** | **$ 11,964,605.00** | **$ 11,166,659.19** | **$ 1,223,045.78** | **$ 12,389,704.97** | **$ 425,099.97** |

**GENERAL FUND**
**STATEMENT OF EXPENDITUES COMPARED TO BUDGET**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

| | | BUDGET | ACTUAL Y-T-D 2/28/2025 | ENCUMBERED | TOTAL 2/28/2025 | BALANCE FAVORABLE/ (UNFAVORABLE) | --%-- COMMITTED |
|---|---|---|---|---|---|---|---|
| **INSTRUCTION** | | | | | | | |
| 1111 | Elementary, K-5 | $ 1,336,914.00 | $ 574,257.14 | $ 494,588.15 | $ 1,068,845.29 | $ 268,068.71 | |
| 1113 | Elementary Extra-curricular | 3,864.00 | 1,702.35 | 1,904.28 | 3,606.63 | 257.37 | |
| 1121 | Middle/Junior High Programs | 271,397.00 | 129,491.74 | 127,024.75 | 256,516.49 | 14,880.51 | |
| 1122 | Middle/Junior High School Extra-curricular | 36,686.00 | 29,249.43 | 5,588.76 | 34,838.19 | 1,847.81 | |
| 1131 | High School Programs | 390,968.00 | 189,067.23 | 175,588.61 | 364,655.84 | 26,312.16 | |
| 1132 | High School Extra-curricular | 149,995.00 | 78,759.41 | 21,624.28 | 100,383.69 | 49,611.31 | |
| 1250 | Less Restrictive Programs: Students w/ Disability | 636,673.00 | 199,290.85 | 182,130.69 | 381,421.54 | 255,251.46 | |
| 1291 | English Second Language Programs | 8,359.00 | 859.13 | 571.35 | 1,430.48 | 6,928.52 | |
| | **TOTAL INSTRUCTION** | 2,834,856.00 | 1,202,677.28 | 1,009,020.87 | 2,211,698.15 | 623,157.85 | 78.02% |
| **SUPPORT SERVICES** | | | | | | | |
| 2113 | Social Work Services | - | 2,591.01 | 2,677.97 | 5,268.98 | (5,268.98) | |
| 2114 | Student Accounting Services | 28,801.00 | 19,650.48 | 9,935.33 | 29,585.81 | (784.81) | |
| 2134 | Nurse Services | 12,000.00 | 8,325.24 | - | 8,325.24 | 3,674.76 | |
| 2142 | Psychological Testing Services | 50,200.00 | - | 13,425.00 | 13,425.00 | 36,775.00 | |
| 2152 | Speech Pathology Services | 65,900.00 | - | 22,327.00 | 22,327.00 | 43,573.00 | |
| 2160 | Other Student Treatment Services | 39,500.00 | - | 26,850.00 | 26,850.00 | 12,650.00 | |
| 2190 | Service Direction, Student Support Services | 82,526.00 | 36,330.58 | 25,487.08 | 61,817.66 | 20,708.34 | |
| 2210 | Improvement of Instruction Services | - | 154.96 | 73.97 | 228.93 | (228.93) | |
| 2222 | Library/Media Center | 1,250.00 | - | - | - | 1,250.00 | |
| 2230 | Assessment and Testing | 4,368.00 | 2,507.21 | 1,785.22 | 4,292.43 | 75.57 | |
| 2240 | Instructional Staff Development | 26,000.00 | 273.60 | - | 273.60 | 25,726.40 | |
| 2310 | Board of Education Services | 161,200.00 | 46,386.50 | 10,847.59 | 57,234.09 | 103,965.91 | |

**GENERAL FUND**
**STATEMENT OF EXPENDITUES COMPARED TO BUDGET**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

| | | | BUDGET | ACTUAL Y-T-D 2/28/2025 | ENCUMBERED | TOTAL 2/28/2025 | BALANCE FAVORABLE/ (UNFAVORABLE) | --%-- COMMITTED |
|---|---|---|---|---|---|---|---|---|
| 2321 | | Office of the Superintendent Services | 266,441.00 | 158,237.31 | 71,217.28 | 229,454.59 | 36,986.41 | |
| 2410 | | Office of the Principal Services | 502,660.00 | 268,559.05 | 192,695.67 | 461,254.72 | 41,405.28 | |
| 2520 | | Fiscal Services | 355,450.00 | 160,167.65 | 90,815.00 | 250,982.65 | 104,467.35 | |
| 2540 | | Operation and Maintenance of Plant Services | 609,241.00 | 297,977.90 | 101,646.79 | 399,624.69 | 209,616.31 | |
| 2550 | | Student Transportation Services | 1,009,576.00 | 497,356.81 | 294,777.68 | 792,134.49 | 217,441.51 | |
| 2660 | | Technology Services | 117,316.00 | 39,522.51 | 13,845.51 | 53,368.02 | 63,947.98 | |
| 2700 | | Supplemental Retirement Program | - | - | - | - | - | |
| | | **TOTAL SUPPORT SERVICES** | 3,332,429.00 | 1,538,040.81 | 878,407.09 | 2,416,447.90 | 915,981.10 | 72.51% |
| **OTHER REQUIREMENTS** | | | | | | | | |
| 5200 | | Transfers of Funds | | | | | | |
| 5200 | 790 | Food Service | 123,405.00 | - | 58,281.82 | 58,281.82 | 65,123.18 | |
| 5200 | 792 | Bus Fund | 140,002.00 | 140,002.00 | | 140,002.00 | - | |
| 5200 | 793 | Special Revenue | - | - | 1,524.84 | 1,524.84 | (1,524.84) | |
| 5200 | 794 | Capital Projects | 700,000.00 | - | | - | 700,000.00 | |
| 6110 | | Operating Contingency | 500,000.00 | - | | - | 500,000.00 | |
| 7000 | | Unappropriated Ending Fund Balance | 4,333,913.00 | - | | - | 4,333,913.00 | |
| | | **TOTAL OTHER REQUIREMENTS** | 5,797,320.00 | 140,002.00 | 59,806.66 | 199,808.66 | 5,597,511.34 | 3.45% |
| | | **TOTAL EXPENDITURES** | $ 11,964,605.00 | $ 2,880,720.09 | $ 1,947,234.62 | $ 4,827,954.71 | $ 7,136,650.29 | 40.35% |
| **PROJECTED ENDING FUND BALANCE** | | | $ - | | | $ 7,561,750.26 | $ 7,561,750.26 | |

**SPECIAL REVENUE FUNDS**
**STATEMENT OF GRANTS AND OTHER SPECIAL REVENUE FUNDS**

| # | Fund Title | End Date | Grant Amount | Beginning Cash | REVENUE Y-T-D | REVENUE PROJECTED | Transfer from General Fund | REVENUE TOTAL | EXPENDITURES Y-T-D | EXPENDITURES Encumbered | EXPENDITURES TOTAL | Balance |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 11 | | | | | | | | | | |
| 200 | Donations | | | $ 3,132.95 | $ - | - | | $ 3,132.95 | $ 402.80 | $ 500.00 | $ 902.80 | $ 2,230.15 |
| 203 | Title I-A | 9/30/2024 | 10,797.33 | - | 6,784.74 | 4,012.59 | | 10,797.33 | 10,797.33 | | 10,797.33 | |
| 203 | Title I-A | 9/30/2025 | 50,857.00 | | 24,737.32 | 26,119.68 | | 50,857.00 | 24,657.18 | 19,475.63 | 44,132.81 | |
| 203 | **Total Title I** | | 61,654.33 | | 31,522.06 | 30,132.27 | | 61,654.33 | 35,454.51 | 19,475.63 | 54,930.14 | 6,724.19 |
| 205 | Small Rural School Achievement (SRSA) | 9/30/2025 | 54,607.00 | - | 44,354.58 | 10,252.42 | | 54,607.00 | 44,354.58 | - | 44,354.58 | 10,252.42 |
| 207 | Youth Transition Program | 9/15/2024 | 4,972.97 | - | 4,972.97 | - | | 4,972.97 | 4,972.97 | - | 4,972.97 | - |
| 207 | Preemployment Transition Program | 6/30/2025 | 45,000.00 | | 8,825.00 | 36,175.00 | | 45,000.00 | 2,341.77 | 5.00 | 2,346.77 | 42,653.23 |
| 206 | Title III-A Immigrant Grant | 9/30/2025 | 224.00 | - | - | 224.00 | | 224.00 | 215.97 | - | 215.97 | 8.03 |
| 208 | E-Rate Funds | | | 26,354.88 | - | - | | 26,354.88 | 26,204.57 | - | 26,204.57 | 150.31 |
| 210 | IDEA Part B 611 | 9/30/2024 | 18,267.60 | - | | 18,267.60 | | 18,267.60 | 18,267.60 | - | 18,267.60 | - |
| 210 | IDEA Part B 611 | 9/30/2026 | 60,260.33 | | 31,746.99 | 28,513.34 | | 60,260.33 | 19,374.33 | 39,259.37 | 58,633.70 | |
| 210 | **Total IDEA Part B 611** | | 78,527.93 | | 31,746.99 | 46,780.94 | | 78,527.93 | 37,641.93 | 39,259.37 | 76,901.30 | 1,626.63 |
| 213 | Special Education Stipend | 6/30/2025 | 3,566.88 | | - | 3,566.88 | 1,524.84 | 5,091.72 | - | 5,091.72 | 5,091.72 | - |
| 216 | IDEA Part B 619 FFY24 | 9/30/2026 | 401.15 | | - | 401.15 | | 401.15 | - | - | - | 401.15 |
| 220 | Title II-A - Teacher Quality 23-24 | 9/30/2024 | 5,305.66 | - | 5,305.66 | - | | 5,305.66 | 5,305.66 | - | 5,305.66 | - |
| 220 | Title II-A - Teacher Quality 23-24 | 9/30/2025 | 7,236.00 | - | | 7,236.00 | | 7,236.00 | 1,153.11 | | 1,153.11 | 6,082.89 |
| 220 | Title IV-A - Student Support and Academic Enrichment 23-24 | 9/30/2024 | 10,000.00 | - | 10,000.00 | - | | 10,000.00 | 10,000.00 | | 10,000.00 | - |
| 220 | Title IV-A - Student Support and Academic Enrichment 23-24 | 9/30/2025 | 10,981.00 | | 1,153.11 | 9,827.89 | | 10,981.00 | | - | - | 10,981.00 |
| 220 | **Title V- B REAP** | | 33,522.66 | | 16,458.77 | 17,063.89 | | 33,522.66 | 16,458.77 | - | 16,458.77 | 17,063.89 |
| 227 | Early Literacy Grant | 6/30/2025 | 59,749.82 | - | 44,812.37 | 14,937.45 | | 59,749.82 | 29,412.84 | 26,836.29 | 56,249.13 | 3,500.69 |
| 228 | After School Programs | 6/30/2025 | 3,000.00 | - | 3,000.00 | - | | 3,000.00 | 1,302.06 | - | 1,302.06 | 1,697.94 |
| | **ESSER** | | | | | | | | | | | |
| 232 | ESSER III | 9/30/2024 | 91,992.21 | - | 91,992.21 | - | | 91,992.21 | 91,992.21 | - | 91,992.21 | - |
| | **Integrated Guidance** | | | | | | | | | | | |
| 226 | Early Indicator Intervention | 6/30/2025 | $ 806.31 | $ - | $ 107.33 | $ 698.98 | | $ 806.31 | $ 107.33 | $ - | $ 107.33 | 698.98 |
| 248 | Federal School Improvement Funds to CSI & TSI Schools 22-23 | 9/30/2025 | 51,290.93 | - | 21,808.97 | 29,481.96 | | 51,290.93 | 25,664.53 | 23,647.56 | 49,312.09 | 1,978.84 |
| 251 | Student Investment Account - Y1 | 9/30/2024 | 152,036.58 | - | 152,036.58 | - | | 152,036.58 | 152,036.58 | - | 152,036.58 | - |
| 251 | Student Investment Account - Y2 | 6/30/2025 | 518,906.68 | - | 389,180.01 | 129,726.67 | | 518,906.68 | 238,215.78 | 228,869.22 | 467,085.00 | 51,821.68 |
| 252 | High School Success M98 - Y1 | 8/31/2025 | 581.94 | | 581.94 | 0.00 | | 581.94 | 581.94 | | | |
| 252 | High School Success M98 - Y2 | 6/30/2025 | 98,065.21 | - | 20,101.05 | 77,964.16 | | 98,065.21 | 33,050.05 | 35,115.04 | 68,165.09 | 29,900.12 |
| | **Total Integrated Guidance** | | 821,687.65 | | 583,815.88 | 237,871.77 | - | 821,687.65 | 449,656.21 | 287,631.82 | 737,288.03 | 84,399.62 |
| 257 | Baseball/Softball Program | | - | 3,706.92 | - | | | 3,706.92 | - | - | - | 3,706.92 |

**SPECIAL REVENUE FUNDS**

**STATEMENT OF GRANTS AND OTHER SPECIAL REVENUE FUNDS**

| | | 11 | | | REVENUE | | | | EXPENDITURES | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| # | Fund Title | End Date | Grant Amount | Beginning Cash | Y-T-D | PROJECTED | Transfer from General Fund | TOTAL | Y-T-D | Encumbered | TOTAL | Balance |
| 256 | Carl Perkins | | 5,369.73 | - | 4,415.53 | 954.20 | | 5,369.73 | 5,065.53 | 304.20 | 5,369.73 | - |
| 259 | Student Activity Funds | | - | 46,945.70 | 21,415.76 | | | 68,361.46 | 8,949.02 | 165.50 | 9,114.52 | 59,246.94 |
| 263 | Outdoor School | 6/30/2025 | 11,700.87 | - | - | 11,700.87 | | 11,700.87 | 6,138.22 | 5,562.65 | 11,700.87 | - |
| 272 | TAP Sesimic Grant | 12/31/2025 | 14,000.00 | - | - | 14,000.00 | | 14,000.00 | 12,250.00 | 1,750.00 | 14,000.00 | - |
| 290 | Bus Replacement Fund | | - | 87,316.04 | 330,587.69 | | 140,002.00 | 557,905.73 | 416,146.00 | 24,453.00 | 440,599.00 | 117,306.73 |
| 298 | Nutrition Services Grants | | | | | | | | | | | |
| 126 | CNP Equipment Grant | 6/30/2025 | 176.82 | | - | 176.82 | | 176.82 | | | - | 176.82 |
| 127 | Fresh Fruit and Vegetable Program 24-25 | 9/30/2025 | 15,096.00 | - | 288.60 | 14,807.40 | | 15,096.00 | 485.25 | 14,610.75 | 15,096.00 | - |
| 299 | Nutrition Services | | - | - | 80,149.69 | 61,405.70 | 58,281.82 | 199,837.21 | 109,499.05 | 90,338.16 | 199,837.21 | - |
| | TOTAL | | | 167,456.49 | 1,298,358.10 | 500,450.76 | 199,808.66 | 2,166,074.01 | 1,298,944.26 | 515,984.09 | 1,814,928.35 | 351,145.66 |

Participation

| | | | Participation | | Avg per Day | | Participation Percentage | |
|---|---|---|---|---|---|---|---|---|
| Month | Days Service | Eligible Students | Breakfast | Lunch | Breakfast | Lunch | Breakfast | Lunch |
| Aug | 4 | 168 | 445 | 401 | 111.25 | 100.25 | 66.2% | 59.7% |
| Sept | 17 | 170 | 1995 | 1866 | 117.35 | 109.76 | 69.0% | 64.6% |
| Oct | 19 | 170 | 2136 | 2135 | 112.42 | 112.37 | 66.1% | 66.1% |
| Nov | 15 | 170 | 1706 | 1617 | 113.73 | 107.80 | 66.9% | 63.4% |
| Dec | 12 | 169 | 1322 | 1320 | 110.17 | 110.00 | 65.2% | 65.1% |
| Jan | 14 | 172 | 1668 | 1623 | 119.14 | 115.93 | 69.3% | 67.4% |
| Feb | 14 | 171 | 1531 | 1,563 | 109.36 | 111.64 | 64.0% | 65.3% |
| Mar | 13 | | | | | | | |
| April | 18 | | | | | | | |
| May | 17 | | | | | | | |
| June | 8 | | | | | | | |
| | | | | | | | | |
| Total/Average | 95 | 170 | 10,803 | 10,525 | 113.72 | 110.79 | 66.9% | 65.2% |

**24-25 Financial Projection - Food Service Program**
**As of February 28, 2025**

| Account | Description | Budget | YTD | Projected | Total |
|---|---|---|---|---|---|
| **Revenue** | | | | | |
| 299.0000.1610.000.000.000 | Daily Sales -Adult Sales | $ 4,500.00 | $ 970.85 | $ 572.29 | $ 1,543.14 |
| 299.0000.3102.000.000.000 | State School Fund - School Lunch Match | - | - | 1,099.63 | $ 1,099.63 |
| 299.0000.3299.000.000.121 | State: Breakfast | 4,500.00 | 357.70 | 2,157.84 | 2,515.54 |
| 299.0000.3299.000.000.122 | State: Lunch | 7,300.00 | 545.36 | 2,885.33 | 3,430.69 |
| 299.0000.4500.000.000.123 | SNP: Breakfast | 58,000.00 | 24,972.73 | 21,274.31 | 46,247.04 |
| 299.0000.4500.000.000.124 | SNP: Lunch | 68,201.00 | 38,534.11 | 33,416.30 | 71,950.41 |
| 299.0000.4500.000.000.124 | Supply Chain | | 9,632.37 | | 9,632.37 |
| 299.0000.4910.000.000.000 | Federal Commodities | 1,000.00 | 5,136.57 | | 5,136.57 |
| | **Total Revenue** | $ 143,501.00 | $ 80,149.69 | $ 61,405.70 | $ 141,555.39 |

| Expenditures | | Budget | YTD | Encumbered | Total |
|---|---|---|---|---|---|
| 299.3100.0112.000.000.000 | Classified Salaries | $ 50,105.00 | $ 23,994.74 | $ 24,762.65 | $ 48,757.39 |
| 299.3100.0122.000.000.000 | Substitutes - Classified | - | 1,359.36 | - | 1,359.36 |
| 299.3100.0132.000.000.000 | Additional Salary - Classified | 1,200.00 | 68.28 | - | 68.28 |
| 299.3100.0211.000.000.000 | Employer Contrib PERS | 12,841.00 | 6,363.21 | 6,198.07 | 12,561.28 |
| 299.3100.0212.000.000.000 | Employee Contribution Pick-Up | 3,078.00 | 1,525.34 | 1,485.78 | 3,011.12 |
| 299.3100.0220.000.000.000 | Social Sec/Medicare | 3,925.00 | 1,944.85 | 1,894.38 | 3,839.23 |
| 299.3100.0231.000.000.000 | Worker's Compensation | 1,183.00 | 634.13 | 611.89 | 1,246.02 |
| 299.3100.0232.000.000.000 | Unemployment Compensation | 8,627.00 | 946.81 | 832.33 | 1,779.14 |
| 299.3100.0233.000.000.000 | PFMLI | 205.00 | 101.68 | 99.06 | 200.74 |
| 299.3100.0242.000.000.000 | Group Health Insurance | 32,400.00 | 10,793.28 | 10,812.91 | 21,606.19 |
| 299.3100.0342.000.000.000 | Travel, Out of District | - | 747.10 | 237.86 | 984.96 |
| 299.3100.0380.000.000.000 | Non-instructional Professional and Technical Servi | 2,000.00 | 917.00 | - | 917.00 |
| 299.3100.0410.000.000.000 | Consumable Supplies and Materials | 1,000.00 | 645.05 | - | 645.05 |
| 299.3100.0413.000.000.000 | Freight for Commodities | - | 484.81 | - | 484.81 |
| 299.3100.0450.000.000.000 | FOOD | 96,342.00 | 33,223.85 | 23,978.23 | 57,202.08 |
| 299.3100.0451.000.000.000 | Federal Commodities | 10,000.00 | 5,136.57 | - | 5,136.57 |
| 299.3100.0460.000.000.000 | Non-consumable Items | 1,000.00 | 52.99 | - | 52.99 |
| 299.3100.0470.000.000.000 | Computer Software (Meal Time) | - | 1,135.00 | - | 1,135.00 |
| 299.3100.0541.000.000.000 | Initial and Additional Equipment Purchase | 5,000.00 | - | - | - |
| 299.3100.0640.000.000.000 | Dues and Fees (Corvallis/MealTime) | 38,000.00 | 19,425.00 | 19,425.00 | 38,850.00 |
| | **Total Expenses** | 266,906.00 | 109,499.05 | 90,338.16 | 199,837.21 |
| | **Net Profit/Loss** | (123,405.00) | (29,349.36) | (28,932.46) | (58,281.82) |
| **Other Income** | | | | | |
| 299.0000.5200.000.000.000 | Interfund Transfers | 123,405.00 | - | 58,281.82 | 58,281.82 |
| 299.0000.5400.000.000.000 | Resources - Beginning Fund Balance | - | - | - | - |
| | **Total Other Uses** | 123,405.00 | - | 58,281.82 | 58,281.82 |
| | **Ending Fund Balance** | **$ -** | **$ (29,349.36)** | **$ 29,349.36** | **$ -** |

**299 - Food Service Program**

**Analysis per Meal**

| | Meals Served | Total | Costs per Meal | % |
|---|---|---|---|---|
| **State Reimb per meal** | | | | |
| Adult Sales | 363 | $ 1,543.14 | $ 4.25 | |
| Breakfast | 17,171 | 48,762.58 | $ 2.84 | |
| Lunch | 16,729 | 75,381.10 | 4.51 | |
| Other Sources | | $ 10,732.00 | | |
| Federal Commodities | | 5,136.57 | | |
| **Total Revenue** | 34,263 | $ 141,555.39 | $ 4.13 | |
| Payroll Costs | | $ 94,428.75 | $ 2.76 | 47.4% |
| Food Costs | | 57,202.08 | 1.67 | 28.6% |
| Federal Commodities | | 5,136.57 | 0.15 | 2.6% |
| Fees | | 38,850.00 | 1.13 | 19.4% |
| Other | | 4,219.81 | 0.12 | 2.1% |
| **Total Costs** | | $ 199,837.21 | $ 5.83 | 100% |
| **Net Loss** | | **$ (58,281.82)** | **$ (1.70)** | |

**DEBT SERVICE**
**STATEMENT OF EXPENDITUES COMPARED TO BUDGET**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

| | | | BUDGET | ACTUAL Y-T-D 2/28/2025 | ENCUMBERED | TOTAL 2/28/2025 | BALANCE FAVORABLE/ (UNFAVORABLE) | --%-- COMMITTED |
|---|---|---|---|---|---|---|---|---|
| **RESOURCES** | | | | | | | | |
| 1111 | | CURRENT YEAR'S TAXES | **$ 94,940.00** | $ 93,641.46 | **1,298.54** | **94,940.00** | **-** | |
| 1112 | | PRIOR YEAR'S TAXES | **500.00** | (201.28) | | **(201.28)** | **(701.28)** | |
| 1190 | | OTHER TAXES | **100.00** | 89.10 | | **89.10** | **(10.90)** | |
| 1510 | | INTEREST EARNINGS | **-** | 2,377.37 | | **2,377.37** | **2,377.37** | |
| 5400 | | BEGINNING FUND BALANCE | **22,392.00** | 29,106.43 | | **29,106.43** | **6,714.43** | |
| | | **TOTAL INSTRUCTION** | **117,932.00** | **125,013.08** | **1,298.54** | **126,311.62** | **8,379.62** | |
| **EXPENDITURES** | | | | | | | | |
| 5110 | | Long-Term Debt Service | | | | | | |
| 5110 | 610 | Redemption of Principal | **35,000.00** | **-** | **35,000.00** | **35,000.00** | **-** | |
| 5110 | 621 | Regular Interest | **61,050.00** | **30,525.00** | **30,525.00** | **61,050.00** | **-** | |
| 7000 | | Unappropriated Ending Fund Balance | **21,882.00** | **-** | **-** | **-** | **21,882.00** | |
| | | **TOTAL EXPENDITURES** | **117,932.00** | **30,525.00** | **65,525.00** | **96,050.00** | **21,882.00** | **81.45%** |
| **PROJECTED ENDING FUND BALANCE** | | | **$ -** | **$ 94,488.08** | **$ (64,226.46)** | **$ 30,261.62** | **$ 30,261.62** | |

**CAPITAL PROJECTS (400)**
**STATEMENT OF EXPENDITUES COMPARED TO BUDGET**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

| | | | ACTUAL Y-T-D | | | | TOTAL | BALANCE FAVORABLE/ | --%-- |
|---|---|---|---|---|---|---|---|---|---|
| | | BUDGET | 2/28/2025 | ENCUMBERED | Requisitions | ENCUMBERED | 2/28/2025 | (UNFAVORABLE) | COMMITTED |
| **RESOURCES** | | | | | | | | | |
| 1510 | Interest Earnings | **$ -** | $ 9,438.04 | | | | **9,438.04** | **(9,438.04)** | |
| 5200 | Transfer from General Fund | **700,000.00** | - | | | | **-** | **700,000.00** | |
| 5400 | Beginning Fund Balance | **274,748.00** | 282,454.52 | | | | **282,454.52** | **(7,706.52)** | |
| | **TOTAL INSTRUCTION** | **974,748.00** | **291,892.56** | **-** | **-** | **-** | **291,892.56** | **682,855.44** | |
| **EXPENDITURES** | | | | | | | | | |
| 4150 | Building Improvement | **974,748.00** | **8,196.99** | **193,827.00** | **4,476.00** | **198,303.00** | **206,499.99** | **768,248.01** | |
| 7000 | Unappropriated Ending Fund Balance | **-** | **-** | **-** | **-** | **-** | **-** | **-** | |
| | **TOTAL EXPENDITURES** | **974,748.00** | **8,196.99** | **193,827.00** | **4,476.00** | **198,303.00** | **206,499.99** | **768,248.01** | **21.18%** |
| **PROJECTED ENDING FUND BALANCE** | | **$ -** | **$ 283,695.57** | **$ (193,827.00)** | **$ (4,476.00)** | **$ (198,303.00)** | **$ 85,392.57** | **$ 85,392.57** | |

**BOND 2021 AND OSCIM GRANT (410)**
**STATEMENT OF EXPENDITUES COMPARED TO BUDGET**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

| | | BUDGET | ACTUAL Y-T-D 2/28/2025 | ENCUMBERED | TOTAL 2/28/2025 | BALANCE FAVORABLE/ (UNFAVORABLE) | --%-- COMMITTED |
|---|---|---|---|---|---|---|---|
| **RESOURCES** | | | | | | | |
| 1510 | Interest Earnings | **$ 12,000.00** | $ 9,241.87 | | **9,241.87** | **(2,758.13)** | |
| 3299 | State Grant | **500,000.00** | 365,780.04 | **-** | **365,780.04** | **(134,219.96)** | |
| 5400 | Beginning Fund Balance | **888,000.00** | 1,194,155.91 | | **1,194,155.91** | **306,155.91** | |
| | **TOTAL INSTRUCTION** | **1,400,000.00** | **1,569,177.82** | **-** | **1,569,177.82** | **169,177.82** | |
| **EXPENDITURES** | | | | | | | |
| 4150 | Building Improvement | **1,400,000.00** | **1,502,285.00** | **12,052.66** | **1,514,337.66** | **(114,337.66)** | |
| 7000 | Unappropriated Ending Fund Balance | **-** | **-** | **-** | **-** | **-** | |
| | **TOTAL EXPENDITURES** | **1,400,000.00** | **1,502,285.00** | **12,052.66** | **1,514,337.66** | **(114,337.66)** | **108.17%** |
| **PROJECTED ENDING FUND BALANCE** | | **$ -** | **$ 66,892.82** | **$ (12,052.66)** | **$ 54,840.16** | **$ 54,840.16** | |

**SEISMIC REHABILITATION GRANT (430)**
**STATEMENT OF EXPENDITUES COMPARED TO BUDGET**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

| | | BUDGET | ACTUAL Y-T-D 2/28/2025 | ENCUMBERED | TOTAL 2/28/2025 | BALANCE FAVORABLE/ (UNFAVORABLE) | --%-- COMMITTED |
|---|---|---|---|---|---|---|---|
| **RESOURCES** | | | | | | | |
| 1510 | Interest Earnings | **$ -** | $ - | | **-** | **-** | |
| 3299 | State Grant | **2,480,080.00** | 181,900.00 | **2,298,180.00** | **2,480,080.00** | **-** | |
| 5400 | Beginning Fund Balance | **-** | - | | **-** | **-** | |
| | **TOTAL INSTRUCTION** | **2,480,080.00** | **181,900.00** | **2,298,180.00** | **2,480,080.00** | **-** | |
| **EXPENDITURES** | | | | | | | |
| 4150 | Building Improvement | **2,480,080.00** | **266,666.87** | **210,489.33** | **477,156.20** | **2,002,923.80** | |
| 7000 | Unappropriated Ending Fund Balance | **-** | **-** | **-** | **-** | **-** | |
| | **TOTAL EXPENDITURES** | **2,480,080.00** | **266,666.87** | **210,489.33** | **477,156.20** | **2,002,923.80** | **19.24%** |
| **PROJECTED ENDING FUND BALANCE** | | **$ -** | **$ (84,766.87)** | **$ 2,087,690.67** | **$ 2,002,923.80** | **$ 2,002,923.80** | |

**INTERNAL SERVICES**
**STATEMENT OF EXPENDITUES COMPARED TO BUDGET**
**FOR THE FISCAL YEAR 2024-25**
**As of February 28, 2025**

## UNEMPLOYMENT RESERVE

| UNEMPLOYMENT RESERVE | | BUDGET | ACTUAL 2/28/2025 | ENCUMBERED | TOTAL | FAVORABLE/ (UNFAVORABLE) | --%-- COMMITTED |
|---|---|---|---|---|---|---|---|
| **RESOURCES** | | | | | | | |
| 1510 | Interest Earnings | **$ -** | $ 2,613.49 | | **2,613.49** | **2,613.49** | |
| 1970 | Services Provided Other Funds | **183,679.00** | 145,489.09 | | **145,489.09** | **(38,189.91)** | |
| 5400 | Beginning Fund Balance | **-** | - | | **-** | **-** | |
| | **TOTAL INSTRUCTION** | **183,679.00** | **148,102.58** | **-** | **148,102.58** | **(35,576.42)** | |
| **EXPENDITURES** | | | | | | | |
| 2640 | Unemployment | **183,679.00** | **6,800.54** | **-** | **6,800.54** | **176,878.46** | |
| 7000 | Unappropriated Ending Fund Balance | **-** | **-** | **-** | **-** | **-** | |
| | **TOTAL EXPENDITURES** | **183,679.00** | **6,800.54** | **-** | **6,800.54** | **176,878.46** | **3.70%** |
| **PROJECTED ENDING FUND BALANCE** | | **$ -** | **$ 141,302.04** | **$ -** | **$ 141,302.04** | **$ 141,302.04** | |

## PERS RESERVE

| | | BUDGET | ACTUAL 2/28/2025 | ENCUMBERED | TOTAL | FAVORABLE/ (UNFAVORABLE) | --%-- COMMITTED |
|---|---|---|---|---|---|---|---|
| **RESOURCES** | | | | | | | |
| 1510 | Interest Earnings | **$ -** | $ 111.93 | | **111.93** | **111.93** | |
| 1970 | Services Provided Other Funds | **-** | 31,045.75 | | **31,045.75** | **31,045.75** | |
| 5400 | Beginning Fund Balance | **-** | - | | **-** | **-** | |
| | **TOTAL INSTRUCTION** | **-** | **31,157.68** | **-** | **31,157.68** | **31,157.68** | |
| **EXPENDITURES** | | | | | | | |
| 2640 | Unemployment | **-** | **-** | **-** | **-** | **-** | |
| 7000 | Unappropriated Ending Fund Balance | **-** | **-** | **-** | **-** | **-** | |
| | **TOTAL EXPENDITURES** | **-** | **-** | **-** | **-** | **-** | |
| **PROJECTED ENDING FUND BALANCE** | | **$ -** | **$ 31,157.68** | **$ -** | **$ 31,157.68** | **$ 31,157.68** | |

i. Month End Reconcilliations and Financial Review Report

MONTH END RECONCILIATIONS AND FINANCIAL REVIEW REPORT

Month: February 2025

1. Payroll Processing – Reviewed and approved by Human Resources
   - ☐ Payroll reconciliation reports reviewed prior to processing.
   - ☐ Federal and state deposits have been made, as well if quarterly, federal and state reports have been reviewed and submitted
   - ☐ OEBB invoice been reconciled to payroll
   - ☐ Workers Compensation reconciled to payroll
   - ☐ Deduction payment reconciliation reviewed to ensure all liabilities have been processed

Roxie Smallwood — Mar 03 2025

Roxie Smallwood, Human Resource — Date

2. Deposits, Checks, Vouchers
   - ☐ All transactions have been entered into the financial accounting system and processed for the month.
   - ☐ All vouchers for checks and direct deposits have been reviewed and approved by the Superintendent.

Brynn Campbell — Mar 03 2025

Brynn Campbell, Accounts Payable/Receivable — Date

3. Band Reconciliations – Completed and approved by Superintendent
   - ☐ Citizens bank account
   - ☐ Local Government Investment Pool

4. Federal and State reimbursement requests made during the month
   - ☐ Monthly claims made and approved by Superintendent
   - ☐ If applicable, quarterly claims and reports made and approved by Superintendent

5. Financial Statements
   - ☐ Prepared after all reconciliations have been completed
   - ☐ Any manipulation of general ledger transactions in preparing statements
     - ☐ None
     - ☐ Yes, list below:
       1. Accrued substitute payroll based on average cost per month by account code

6. Business Office Internal Controls – Any changes to current procedures?
   - ☐ Yes – submitted to Board for review
   - ■ None

7. Deposits, Checks, Vouchers
   - ■ Issued to Board of Directors after month-end reconciliations – created by Accounts Payable/Receivable and submitted to Superintendent for distribution
   - ■ Has the Board of Directors responded to any items?
     - ■ Yes, and were all Board Members provided with the response
     - ☐ None

8. Other
   - ■ Business Office Internal Controls – Any changes to current procedures?
     - ☐ Yes – submitted to Board for review
     - ■ None

   - ■ Any new pronouncements that will impact financial statements or budget for 25-26 fiscal year.
     - ☐ Yes, list below:

None

Other items that may have an impact on the financial statements of the district?

- ■ None
- ☐ Yes, list below:

Donald Staehely — 3/5/2025

Donald Staehely, Business Manager — Date

Krista Nieraeth, Superintendent — 3/5/25 — Date

*Revised 3/3/2025*

e. Construction Report

# Alsea School District
# Construction Manager's Report

Report Date: March 5, 2025

## GENERAL OVERVIEW

Design for the Seismic Retrofit has been completed and plans have been turned in to the County for review and permitting. Construction is scheduled to begin mid-May with the locker rooms. A pre-bid walk-through with asbestos abatement companies was held in late February. Abatement bids are due March 11. Todd Construction is bidding the rest of the work now and we expect to review the final construction cost with them in early April. Construction is scheduled to begin May 12 in the locker rooms and then in the rest of the work area on June 16.

A second Seismic Grant application for the High School Classroom Wing was submitted to the State in January. Award notice is expected by May 2025.

The Fire Alarm Replacement project has been contracted and design is being completed. The electrical work associated with this work is substantial and the cost is currently in review. Construction is scheduled for this summer and will be coordinated with the Gym Seismic project.

The small HVAC addition in the server room is complete. There are $56k remaining in the contingency.

## PROJECT TEAM

No changes.

## BUDGET

The updated budget summaries for the various projects are provided below with comments for each.

Bond Program

The updated budget summary for the bond program is provided below. There were no changes to committed cost. The only pending actual costs are for the small HVAC addition under Construction Cost.

There are $56k in contingency remaining in the budget. This budget does not include $80k+ gift-in-kind by IMS.

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

## Alsea School Bond Project Budget Summary - Updated March 3, 2025

**Income**

| | Original Budget | Current Budget | Actual Income To-Date | Notes |
|---|---|---|---|---|
| Bond Sale | $ 2,100,000.00 | $ 2,289,477.00 | $ 2,289,477.00 | Bond value $2.1M plus premium of $189,477 |
| Bond Fund Interest | | $ 142,855.41 | $ 142,855.41 | Interest on bond proceeds updated 1/1/25; budget value matched to actual |
| OSCIM Grant | $ 2,100,000.00 | $ 2,100,000.00 | $ 2,100,000.00 | Income value updated 10/2/24 |
| ESSER Funds | $ - | $ 235,117.92 | $ 235,117.92 | ESSER II $68,251.41 (spent 9/23) and ESSER III $166,866.51 (spend by 9/24) after "unfinished learning" deductions. Updated 10/2/24 |
| **Totals** | **$ 4,200,000.00** | **$ 4,767,450.33** | **$ 4,767,450.33** | |

**Expenses**

| | Original Budget | Current Budget | Committed Costs | Paid To-Date | Notes |
|---|---|---|---|---|---|
| Construction Cost | | $ 4,063,133.72 | $ 4,063,133.72 | $ 4,053,905.72 | Costs for construction contractors. |
| Design Fees | | $ 355,588.52 | $ 355,588.52 | $ 355,588.52 | Fees for architect, engineers, geotech, survey & haz material study. |
| Consultant Fees | | $ 51,694.53 | $ 51,694.53 | $ 51,694.53 | Fees for soil testing, special inspections, commissioning & misc consulting. |
| Project Management | | $ 63,276.00 | $ 63,276.00 | $ 63,276.00 | IMS not-to-exceed fee. |
| Permits & Fees | | $ 29,366.70 | $ 29,366.70 | $ 29,366.70 | Permit & site plan fees. |
| Furnishings | | $ 9,752.00 | $ 9,752.00 | $ 9,752.00 | Furnishings, equipment, computers, etc. are either in possession or being funded separately. |
| Other Project Costs | | $ 138,677.70 | $ 138,677.70 | $ 138,677.70 | Attorney, bank fees, insurance, advertising and other miscellaneous project costs. Reconciled with District's financial report 7/14/24. |
| Owner's Contingency | | $ 55,961.16 | NA | NA | For unforeseen costs based on available funds after committed values. |
| **Totals** | **$ -** | **$ 4,767,450.33** | **$ 4,711,489.17** | **$ 4,702,261.17** | |

## Gym Seismic

The updated budget summary for the gym seismic project is provided below. There were no significant changes to committed costs last month.

To date, 13% of the project budget has been spent. The actual construction cost will be established in mid-April after the final bids are received.

## Alsea School Gym Seismic Project Budget Summary - Updated March 5, 2025

**Income**

| | Original Budget | Current Budget | Actual Income To-Date | Notes |
|---|---|---|---|---|
| Seismic Grant | $ 2,480,000.00 | $ 2,480,000.00 | $ 2,480,000.00 | Grant awarded June 2024 |
| Non-Grant Funds | $ - | $ 8,808.47 | $ 8,808.47 | Initial effort by structural engineer before grant fund contract executed. Required to keep project on schedule. |
| **Totals** | **$ 2,480,000.00** | **$ 2,488,808.47** | **$ 2,488,808.47** | |

**Expenses**

| | Original Budget | Current Budget | Committed Costs | Paid To-Date | Notes |
|---|---|---|---|---|---|
| Construction Cost | $ 1,800,000.00 | $ 1,800,000.00 | $ 26,500.00 | $ 26,500.00 | Costs for construction contractors |
| Design Fees | $ 300,000.00 | $ 306,590.00 | $ 306,590.00 | $ 187,270.94 | Fees for architect & engineer |
| Consultant Fees | $ 60,000.00 | $ 60,000.00 | $ 55,772.93 | $ 51,088.98 | Fees for geotech, matl testing and special inspections |
| Project Management | $ 111,600.00 | $ 111,600.00 | $ 111,600.00 | $ 49,770.00 | IMS not-to-exceed fee |
| Permits & Fees | $ 20,000.00 | $ 10,000.00 | $ 6,731.10 | $ 6,731.10 | Jurisdiction fees |
| Other Project Costs | $ 1,000.00 | $ 1,132.27 | $ 1,132.27 | $ 1,132.27 | Advertsing & other miscellaneous |
| Owner's Contingency | $ 187,400.00 | $ 199,486.20 | NA | NA | For unforeseen costs based on available funds |
| **Totals** | **$ 2,480,000.00** | **$ 2,488,808.47** | **$ 508,326.30** | **$ 322,493.29** | |

## Fire Alarm Replacement

The budget summary for the Fire Alarm Replacement project is provided below. The Construction Cost budget increased by $66k last month. The unexpected amount of electrical work accounts for $61k. The underground conduit to the Play Shed, which currently has no fire alarm, accounts for the other $5k for excavation, materials and patch-back.

Alsea School Fire Alarm Project Budget Summary - Updated March 5, 2025

**Income**

| | Original Budget | Current Budget | Actual Income To-Date | Notes |
|---|---|---|---|---|
| General Funds | $ 200,000.00 | $ 251,496.93 | $ 200,000.00 | Original budget funds approved by Board in November 2024 |
| **Totals** | **$ 200,000.00** | **$ 251,496.93** | **$ 200,000.00** | |

**Expenses**

| | Original Budget | Current Budget | Committed Costs | Paid To-Date | Notes |
|---|---|---|---|---|---|
| Construction Cost | $ 200,000.00 | $ 231,496.93 | $ 231,496.93 | $ - | Costs for construction contractors |
| Design Fees | | | $ - | $ - | Design included in SFA contract. |
| Consultant Fees | | | $ - | $ - | None expected |
| Project Management | | $ 20,000.00 | $ 20,000.00 | $ 3,963.00 | IMS not-to-exceed fee |
| Permits & Fees | | | $ - | $ - | Jurisdiction fees in construction contracts |
| Other Project Costs | | | $ - | $ - | None expected. |
| Owner's Contingency | | | NA | NA | |
| **Totals** | **$ 200,000.00** | **$ 251,496.93** | **$ 251,496.93** | **$ 3,963.00** | |

## SCHEDULE

### Gym Seismic

The final construction documents for the Gym Seismic project were submitted for permitting on February 18. Todd is also using these documents for bidding. They issued bid invitations on March 4 and pre-bid tours of the school are being offered on Friday, March 14. Bids are due on April 2. We expect to review the bid results with them during the week of April 7.

The District is making the locker rooms available for construction starting May 12. They will be isolated from the rest of the school at that time. This will be a tremendous benefit to ensuring construction is completed by the start of school in September since so much of the work is in the locker rooms. The rest of the construction areas will be turned over to the contractor on June 16.

### Fire Alarm Replacement

Salem Fire Alarm is expected to complete final design documents for permitting and procurement in March. Construction will begin June 16 when school is out.

## PROJECT-SPECIFIC ACTIVITY

Gym Seismic

Eight abatement companies attended the pre-bid meeting on February 27. Bid documents and bid forms were distributed to these companies and bid questions are being resolved this week. Bids are due week of March 11. We'll prepare contracts and coordinate the abatement schedule with the rest of the seismic work.



Fire Alarm Replacement

An electrical scoping meeting was held with the fire alarm contractor and the school's preferred electrical contractor last month. After a detailed investigation, they determined that more than 3,000 feet of conduit will be needed to protect exposed fire alarm cable throughout the school buildings. This is much more than was originally expected by the fire alarm contractor. A price proposal for the electrical work is in review for this conduit installation along with the power needed for the control panel and specific devices.

## COMMUNICATIONS

IMS monthly reports are being provided to the School Board.

f. Educational Spotlight - Adam Sederlin, LaHO

# SCHOOL BOARD MEETING PROPOSAL REPORT

**Title:** Enhancing Communication and Engagement Among Parents, Teachers, and Students

**Date:** 03/05/2024
**Submitted by:** Adam Sederlin, 2nd grade, LaHO
**Submitted to:** Alsea School Board

## 1. Summary

Effective communication among parents, teachers, and students is essential for fostering engagement and strengthening the school community. During our recent strategic planning workshop, this was identified as a key area of opportunity. A tool currently used in LaHO has demonstrated success in addressing this challenge. This proposal aims to explore and spotlight tools and strategies that can help bridge communication gaps and actively involve families in a more intentional and meaningful way. The superintendent has requested through Lora that the presentation take no more than 7 minutes, so this would be a rapid demonstration with the hopes that active attempts at bridging the school with families could be done in very modern and friendly ways, if attempted.

## 2. Background/Introduction

The saying *"It takes a village"* is especially relevant in education. When families are engaged and informed, student success improves. However, communication barriers can hinder this engagement. Heather mentioned a tool used in LaHO that has effectively addressed these concerns, making it a valuable resource to consider.

## 3. Proposal Details

### Description of the Proposal

This proposal seeks to evaluate and implement communication tools that:

- Provide clear, accessible, and timely communication between teachers, parents, and students.
- Encourage family engagement beyond just receiving updates, fostering true partnership.
- Utilize proven strategies to keep parents informed and involved in school activities and student progress.

### Goals and Objectives

- Strengthen relationships between families and educators.
- Increase transparency in academic progress, school events, and student needs.
- Offer structured ways for parents to contribute meaningfully to their child's education.

## 4. Educational and Community Impact

- Improved parent-teacher-student communication leading to better academic and social outcomes.
- Enhanced family involvement in school decision-making and student learning.
- Creation of a more connected and supportive school environment.

## 5. Recommendations

- The board could approve a formal review and demonstration of LaHO's communication tool.
- If deemed suitable, a pilot program could be implemented in select classrooms.

## 6. Conclusion

Enhancing communication is key to building a strong school community. By leveraging tools and strategies that have already shown success elsewhere, we can create more intentional and effective engagement between families and the school. I urge the board to approve an initial review and discussion of this approach as the first step toward stronger parent-teacher-student partnerships.

g. Safety Committee Report

Alsea School District
Safety Committee Meeting
February 11, 20253:30 PM

Members Present: Sara Littlefield, Mary O'Brien, Keenan Elbers and Lora Nickle.

Members Absent: Joe Harris

1. Staff Concerns – follow up
   a. Play shed noise level - ***Keenan Elbers let the committee know that the cost to add noise protection to the walls or ceiling was going to be expensive. He recommended students and staff affected by the noise to wear disposable ear plugs. He offered to order them in bulk.***
   b. Water fountain in the Play Shed not attached securely to the wall. – ***Keenan Elbers will look at it to see if there is a solution.***
   c. Front Gate: Not latching securely again. – ***Keenan Elbers reported unfortunately because the gates installed were not meant for heavy usage he will have to adjust them periodically.***

2. PACE
   a. All tasks have been completed to receive the 5% discount on the district annual cost.

3. February Fire Drill
   a. Scheduled for February 26th @ 12:45 PM

5. **New Business**

a. LaHO Presentation - Adding a Grade

| Grade | Current #'s (2/25/25) - 69 Total | Potential #'s for SY 25.26 - 88 | Potential Teacher |
|---|---|---|---|
| K | 7 | 10+ | Waverek |
| 1 | 6 | 7+ | Waverek |
| 2 | 18 | 6+ | Dapkus |
| 3 | 19 | 18+ | Dapkus |
| 4 | 10 | 19+ | Naylor |
| 5 | 9 | 10+ | Sederlin |
| 6 | | 9+ | Sederlin |

Students to break even 25-26: 67.38
Potential ADM with K-5: 70+ x 10,882 = 757,400
Potential ADM with K-6: 88+ x 10,822 = 952,336
Budget for SY 25-26 - $733,239

## Proposal for Expanding Learn at Home Oregon (LaHO) to K-6 for SY 25-26

Learn at Home Oregon has successfully provided a high-quality online education experience for students in grades K-5. As we look ahead to the 2025-2026 school year, we have an opportunity to expand our program to include 6th grade. This expansion aligns with our growth projections, strengthens student retention, and enhances financial sustainability. With careful planning, LaHO can accommodate this change while maintaining current staffing levels and operational costs. All LaHO staff support a shift to K-6.

### Key Benefits of Expanding to K-6

#### 1. Increased Enrollment and Financial Stability

- Current projections estimate an enrollment increase from **69 to 88 students** next year.
- Expanding to **K-6 would generate approximately $952,336 in ADM revenue**, compared to **$757,400 for K-5**.
- The **break-even enrollment is 67.38 students**, ensuring the expansion remains financially viable.
- Additional revenue can support long-term growth, program enhancements, and student services.

#### Opportunity for Growth Without Increasing Overhead

- The proposed expansion allows us to **grow student enrollment while maintaining the same number of teachers**.
- **Multi-grade classrooms** are already a successful model at LaHO and will continue to be implemented effectively.
- A **structured K-6 program strengthens retention**, keeping students engaged before they transition to middle school.

#### Improved Student Retention and Continuity

- Many families prefer schools that provide **long-term stability** for their children.
- Offering a **K-6 option reduces student attrition**, allowing families to remain with LaHO longer.

- Parents seeking consistency for their children will be more likely to enroll if they know their child can stay through 6th grade.
- Parents of current 5th graders have expressed interest in staying with our program if there is a 6th grade, **while others have asked if their student could be held back to 5th grade** just so they do not have to leave.

**Meeting the Demand for Virtual Learning**

- Interest in **online education** continues to grow, especially among younger students.
- A full **K-6 program makes LaHO more competitive** with other virtual programs and homeschool alternatives.
- Families with multiple children will benefit from the convenience of a **single school enrollment** for all elementary grades.

**Support for Special Education (SPED) Needs**

- A K-6 structure provides **continuity of IEP services**, reducing transitions and disruptions in learning.
- SPED students benefit from a **consistent virtual learning environment** tailored to their needs.
- Projected **SPED enrollment underscores the importance of maintaining consistent support** across multiple grades, ensuring students receive the resources they need to succeed while allowing for effective planning to balance workloads and maintain program quality.

**Strengthening School Identity and Community**

- A **K-6 model fosters a strong school culture** where students, parents, and teachers feel a deeper connection.
- **Longer student tenure** improves engagement and participation in school activities.
- A **stronger sense of belonging** encourages positive word-of-mouth recommendations, helping LaHO attract new families and grow enrollment.

Expanding Learn at Home Oregon to **K-6 is a strategic and financially sound decision** that will enhance student retention, ensure fiscal sustainability, and strengthen our school's reputation. With minimal additional costs, we can **increase enrollment, provide a stable learning environment, and meet the growing demand for online education**.

b. Financials
c. Resolution 25-06 - Modify Special Revenue Appropriations

## Alsea School District 7J
## Resolution 25-06

**RESOLUTION TO MODIFY THE SPECIAL REVENUE APPROPRIATIONS**
**FY24-25**

**WHEREAS,** Oregon Revised Statute 294.338(2) allows for the recognition of revenue from a donation, grant, gift or bequest and the related appropriations by resolution; and

**WHEREAS,** the District has received final award amounts for 24-25 grants listed below; and

**NOW THEREFORE,** be it resolved that the Board of Directors approve the receipt of grants and adjust the appropriation for those grants listed below as follows:

**Adopted Appropriations**

| Special Revenue Fund | Student Investment Account | Title III-A Immigrant Grant | Carl Perkins | Nutrition Services Grants | Total |
|---|---|---|---|---|---|
| **Appropriations** | | | | | |
| Instructional Services | 620,611.06 | - | - | - | 620,611.06 |
| Support Services | 48,387.20 | | | | 48,387.20 |
| Enterprise & Community Services | 1,500.00 | | | | 1,500.00 |
| Facility Acquisition Services | | | | | - |
| Debt Service | | | | | |
| **Total Appropriations** | 670,498.26 | - | - | - | 670,498.26 |

**Revised Adopted Appropriations'**

| Special Revenue Fund | Student Investment Account | Title III-A Immigrant Grant | Carl Perkins | Nutrition Services Grants | Total | Change |
|---|---|---|---|---|---|---|
| **Appropriations** | | | | | | |
| Instructional Services | 557,922.69 | 224.00 | | | 558,146.69 | (62,464.37) |
| Support Services | 110,520.57 | | 5,369.73 | | 115,890.30 | 67,503.10 |
| Enterprise & Community Services | 2,500.00 | | | 15,096.00 | 17,596.00 | 16,096.00 |
| Facility Acquisition Services | | | | | - | - |
| Debt Service | | | | | | - |
| Total Appropriations | 670,943.26 | 224.00 | 5,369.73 | 15,096.00 | 691,632.99 | 21,134.73 |

**PASSED AND ADOPTED** at a regular meeting of the Board of Directors of Alsea School District 7J **on the 11th day March by the following vote:**

AYES_____ NAYS:_____ ABSENT_____ ABSTAIN:_____

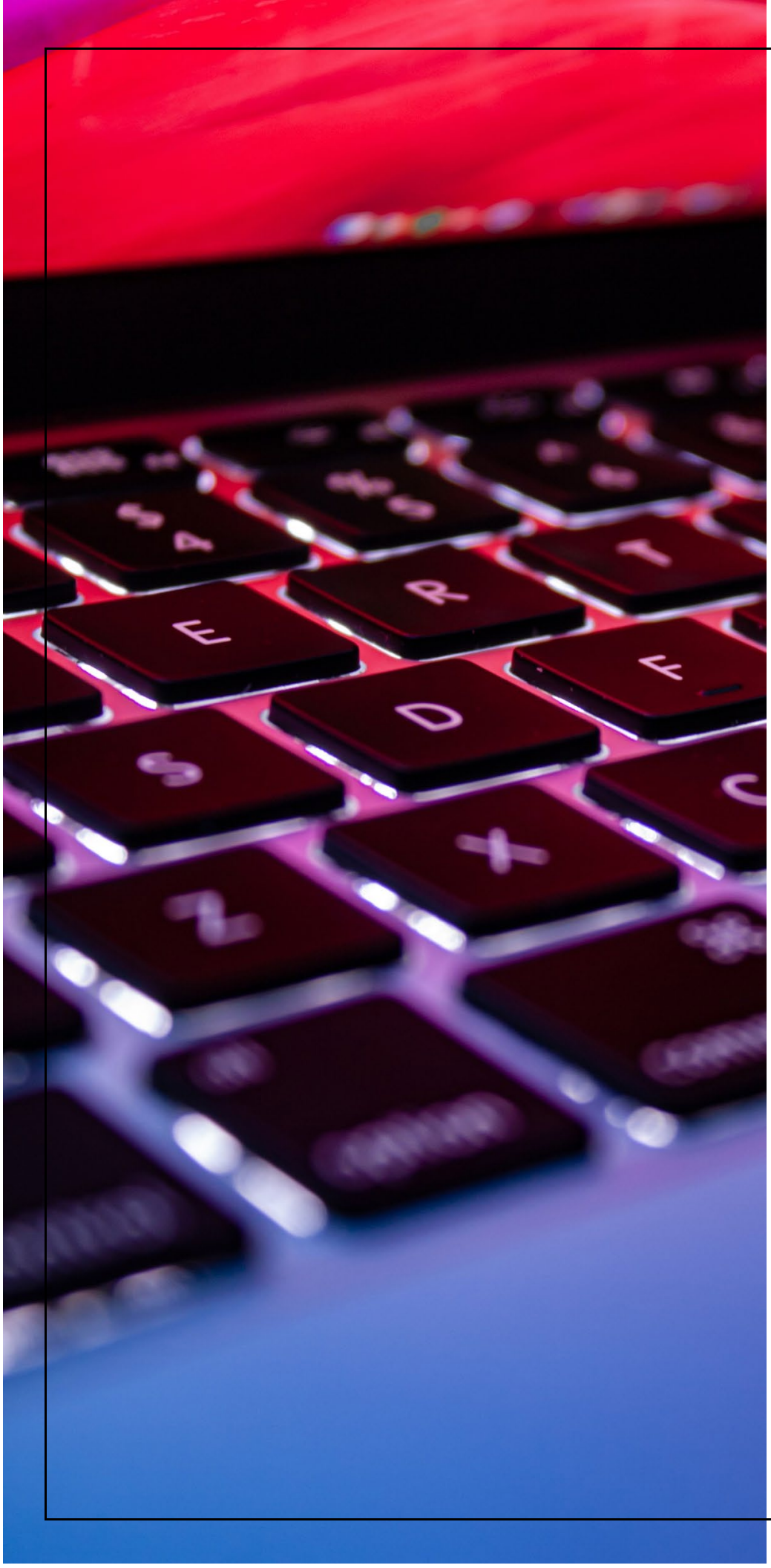
Risteen Follet, Chair Board of Directors Date

Krista Nieraeth, Superintendent Date

ATTEST

Lora Nickle, Executive Secretary

d. Oregon Government Ethics Commission - SEI - due April 15, 2025



# Statement of Economic Interest Filer Guide 2025

**Oregon Government Ethics Commission**

3218 Pringle Rd SE, Ste 220
Salem, OR 97302-1680

503-378-5105

www.oregon.gov/ogec

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**DISCLAIMER**

This training material is issued by the Oregon Government Ethics Commission (OGEC) pursuant to ORS 244.340 Continuing Education Program. This publication is intended for educational and training purposes only and should not be used as a substitute for a review of the specific statutes and rules. There may be other laws or regulations not within the jurisdiction of OGEC that apply to actions or transactions described in this training material. Do not reproduce or distribute without the express written permission of OGEC.

## INTRODUCTION

If you are receiving this guide from your public body, OGEC has been informed that you are a public official who is required by ORS 244.050 to electronically file a Statement of Economic Interest (SEI). The governing body you serve has provided us with your name, position, and email address. You will receive a system-generated email from OGEC's Electronic Filing System (EFS) to create a username, password, and confirm your pre-filled personal profile information is correct and electronically submit to OGEC. You will need to create your profile before March 15th to ensure you receive all communications from OGEC.

During the filing period, failure to complete and electronically file by the final filing date may subject you to an automatic civil penalty of $10.00 for each of the first 14 days the SEI is late and $50.00 for each day thereafter, up to a maximum of $5,000.00 [ORS 244.350(4)(c)].

## WHO IS REQUIRED TO FILE

There are approximately 6,000 Oregon public officials who must file an Annual Verified Statement of Economic Interest (SEI) with OGEC by **April 15th** of each calendar year.

**Public officials who are required to file reports are specified in ORS 244.050**. Please refer to that section of the law to see if your specific position requires you to file

these forms. In general, public officials who hold the following positions are required to file:

- **State:** Public officials who hold elected or appointed executive, legislative or judicial positions. This includes those who have been appointed to positions on certain boards or commissions.

- **Counties:** Elected officials, such as commissioners, assessors, surveyors, treasurers and sheriffs must file, as do planning commission members and the county's principal administrator.

- **Cities:** All elected officials, the city manager or principal administrator, municipal judges and planning commission members.

- **Districts:** Administrative and financial officers in school districts, education service districts and community college districts. Some members of the board of directors for certain special districts. All school board members of each common and union high school district.

- **Candidates:** Individuals running for some elected public offices are also required to file.

For a full list of public officials required to file SEI reports, please see ORS 244.050.

## JURISDICTIONAL CONTACT

OGEC staff has identified the positions held by public officials who must file the SEI form and has them listed in the Electronic Filing System (EFS) by jurisdiction. Each jurisdiction [city, county, executive department, board or commission, etc.] has designated a person who acts as the Commission's point of contact for that jurisdiction. (OAR 199-020-0005(1))

This contact person is known as the **Jurisdictional Contact (JC).** It is through the JC that OGEC obtains the name and email address of each public official who is required to file. When there is a change, through resignation, appointment or election, in who holds a position, the **JC** makes the necessary changes in the EFS.

**Please Note:** If there is a change in the SEI filer's email address or other contact information, it is the **SEI filer's responsibility** to make the change in their personal account - not the responsibility of the JC.

As with other provisions in Oregon Government Ethics law, it is each public official's personal responsibility to ensure they comply with the requirement to complete and submit the SEI form by April 15th.

## GETTING STARTED USING EMAIL LINK

Each jurisdiction has a designated person, a JC, whose responsibility is to keep the OGEC database (Electronic Filing System, EFS) up to date with the names of the public officials serving in specific roles. Once the JC has added you to EFS, you will receive an email invitation to create your account.

**NOTE:** The link in the email is only active for 90 days. If your link is not active, please contact your JC to get a new email invitation and link.

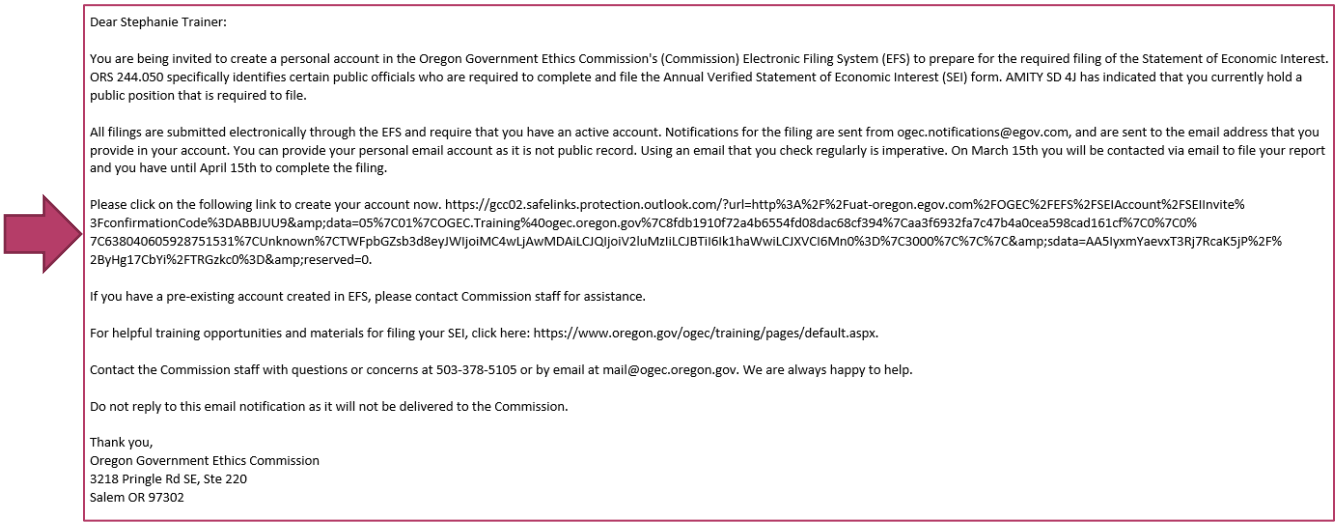
You will only need one account, even if you have multiple roles or seat assignments in EFS. If you serve in multiple roles that require filing an SEI, your positions will be listed in your personal account profile you have set-up. If you already have an account and are being assigned to a new seat, it is important that the JC for your new role has the email associated with your exisiting account. Having multiple accounts may result in EFS charging you penalties.You will only need to file one SEI each year, even if you have multiple positions that require you to file.

**NOTE:** If you are both a JC and an SEI filer, you will have two separate accounts.

## CREATING YOUR ACCOUNT

1. Locate the system-generated email from OGEC: ogec.notification@egov.com

2. Locate the email link within the email.



Dear Stephanie Trainer:

You are being invited to create a personal account in the Oregon Government Ethics Commission's (Commission) Electronic Filing System (EFS) to prepare for the required filing of the Statement of Economic Interest. ORS 244.050 specifically identifies certain public officials who are required to complete and file the Annual Verified Statement of Economic Interest (SEI) form. AMITY SD 4J has indicated that you currently hold a public position that is required to file.

All filings are submitted electronically through the EFS and require that you have an active account. Notifications for the filing are sent from ogec.notifications@egov.com, and are sent to the email address that you provide in your account. You can provide your personal email account as it is not public record. Using an email that you check regularly is imperative. On March 15th you will be contacted via email to file your report and you have until April 15th to complete the filing.

Please click on the following link to create your account now. https://gcc02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fuat-oregon.egov.com%2FOGEC%2FEFS%2FSEIAccount%2FSEIInvite%3FconfirmationCode%3DABBJUU9&data=05%7C01%7COGEC.Training%40ogec.oregon.gov%7C8fdb1910f72a4b6554fd08dac68cf394%7Caa3f6932fa7c47b4a0cea598cad161cf%7C0%7C0%7C638040605928751531%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=AA5IyxmYaevxT3Rj7RcaK5jP%2F%2ByHg17CbYi%2FTRGzkc0%3D&reserved=0.

If you have a pre-existing account created in EFS, please contact Commission staff for assistance.

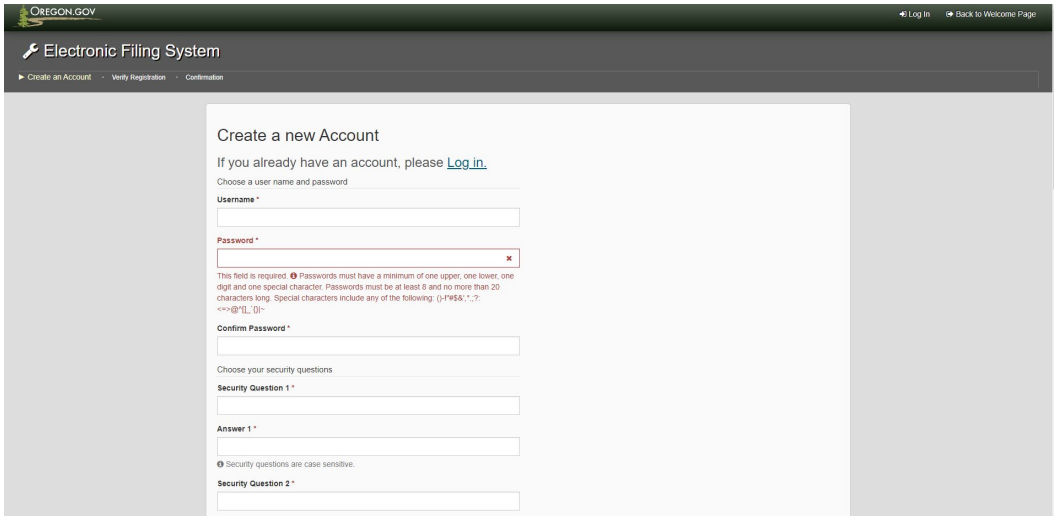
For helpful training opportunities and materials for filing your SEI, click here: https://www.oregon.gov/ogec/training/pages/default.aspx.

Contact the Commission staff with questions or concerns at 503-378-5105 or by email at mail@ogec.oregon.gov. We are always happy to help.

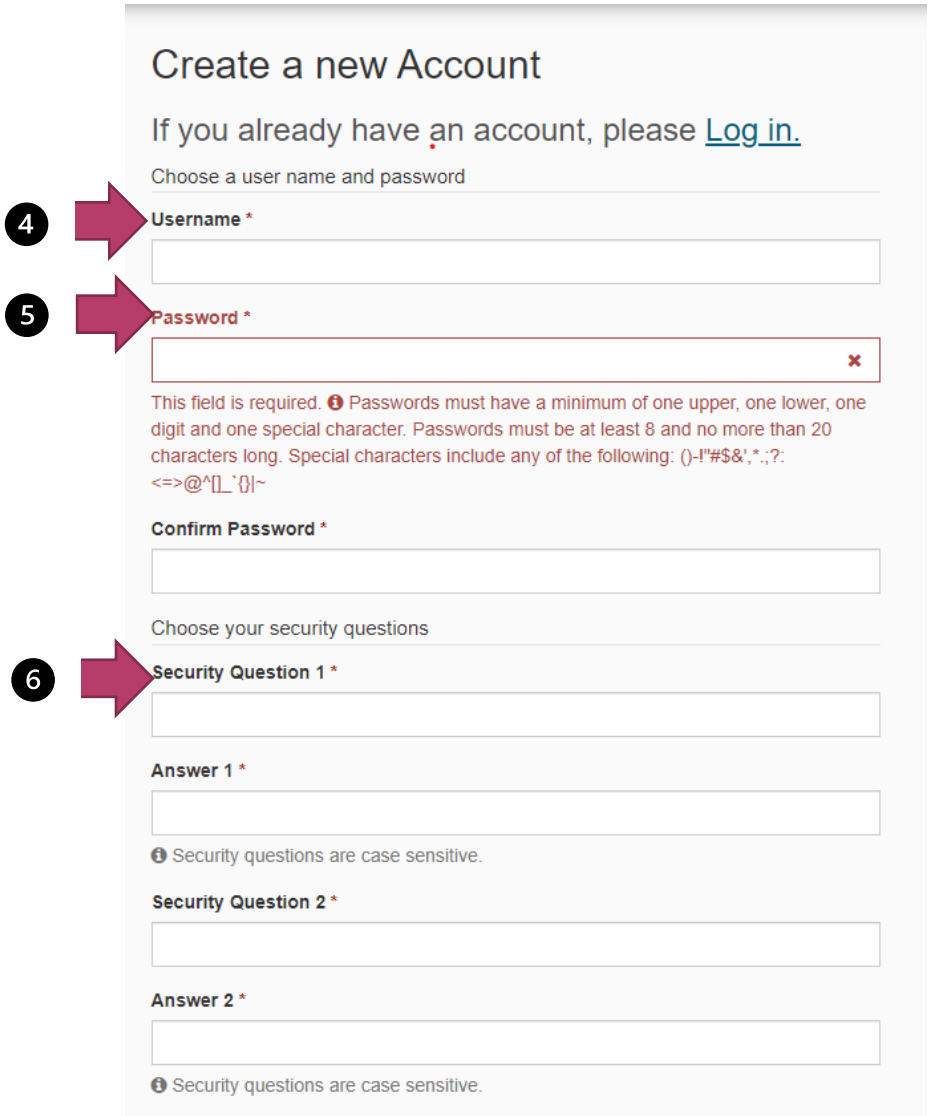
Do not reply to this email notification as it will not be delivered to the Commission.

Thank you,
Oregon Government Ethics Commission
3218 Pringle Rd SE, Ste 220
Salem OR 97302

3. Click on the link or copy the link into your web browser address bar. This will direct you to the “Create a New Account” page of EFS.




Make sure to complete all fields. Many of the fields are prepopulated with information provided by the JC during the seat/position assignment process.




4. **Select Username.**

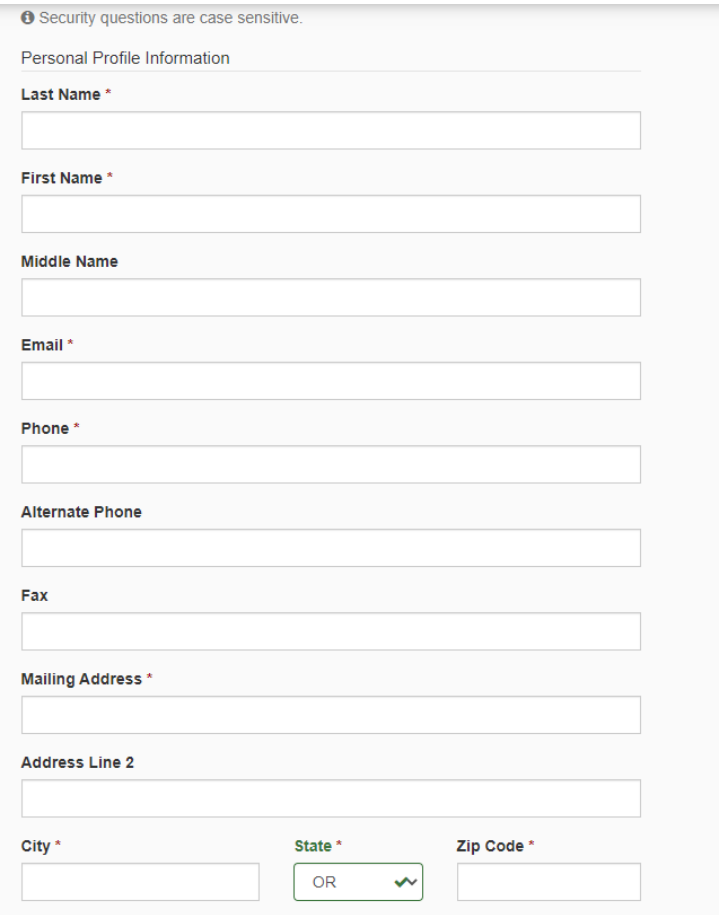
Choose your username carefully, as the username field is permanent. The use of an email address as a username is **NOT** recommended.

5. **Select a password.** Passwords must have a minimum of:
   - ✓ One upper case letter
   - ✓ One lower case letter
   - ✓ One numerical digit
   - ✓ One special character (*See text help for special character list)*
   - ✓ Must be at least 8 and not more than 20 characters long

***NOTE:*** We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.

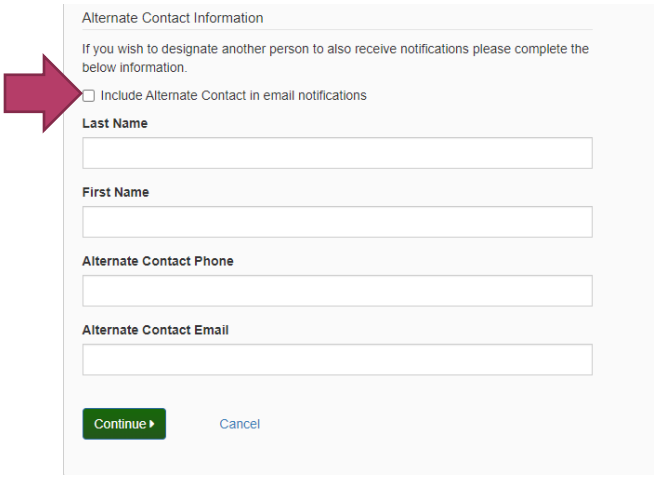
6. **Security Questions**. Security questions enable you to retrieve your password if you are unable to remember it.
   - Security question answers are **case and space sensitive**.
   - If your security question answer contains more than a one-word answer, you will need to remember to include all spaces, punctuation, and special characters that you used.
   - We recommend using factual information. Examples: Model or year of first car, where you went to High School, grandmother's maiden name, etc.

7. **Personal Profile Information.** Verify that the pre-populated personal profile information is correct. It is your responsibility as an SEI filer to maintain your own profile information, which includes mailing address, phone number and most importantly, the email address.



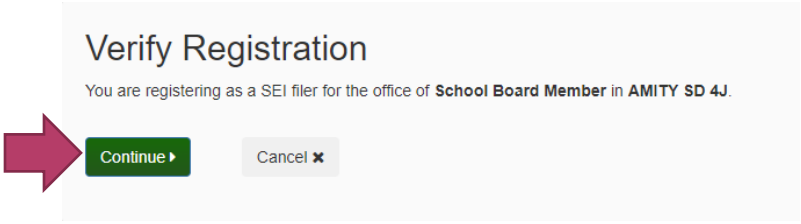
8. **Alternate Contact Information**. You have the option to identify an alternate contact person to receive the same system-generated email notifications that you will receive. It is recommended that you list your JC as an alternate contact.

   **FIRST:** Be sure to check the box to include the designated alternate contact in email notifications. Then you can enter the contact's information. If you do not check the box first, they will not receive copies of the emails.

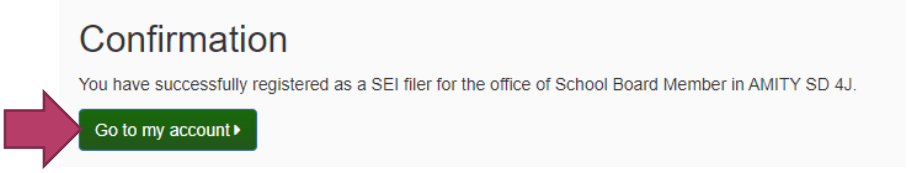



9. After confirming all information is correct, select **CONTINUE**.

10. **Verify Registration.**
    You will now be asked to verify your personal profile information. Select **CONTINUE.**




11. **Confirmation.**
    If you have successfully registered, the **CONFIRMATION** page will appear naming the jurisdiction you have registered for. You will receive a system-generated email confirming that you have successfully registered.



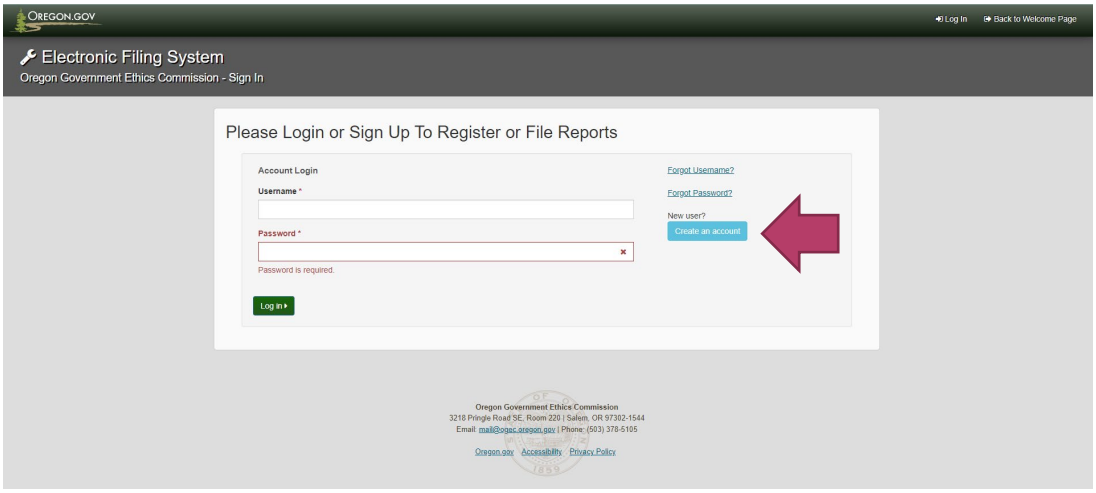
12. Once you have created your personal profile, you will now select **GO TO MY ACCOUNT** to view your account.

## GETTING STARTED USING REGISTRATION CODE/ TOKEN ID

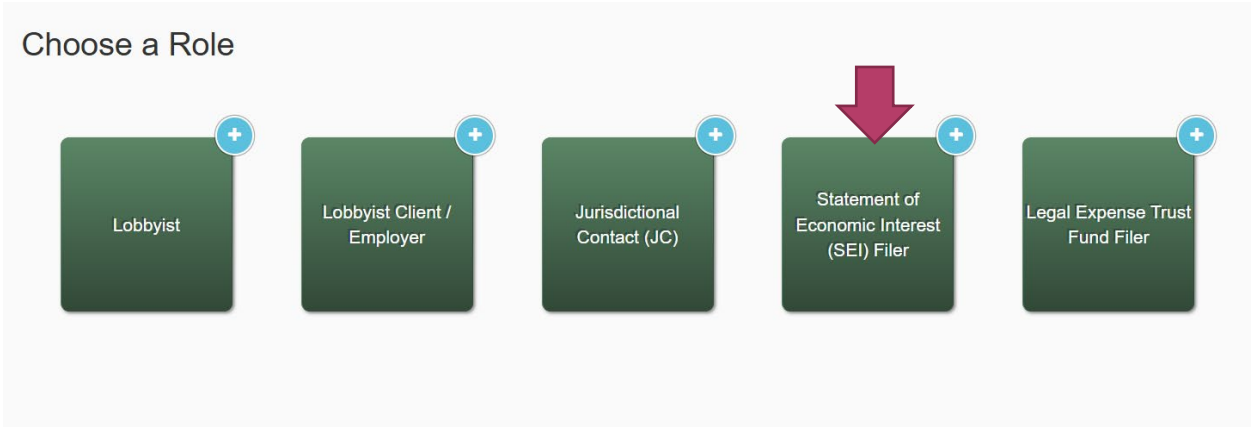
If you are unable to locate the system-generated email from OGEC: ogec.notification@egov.com, please contact your JC. Your JC can provide you with the registration code (also known as the Token ID).

**Please confirm that they entered your email address correctly before using the registration code.** If the JC has not entered your email address correctly, they will need to delete your invitation and re-seat you. This will generate a new email invitation and registration code.

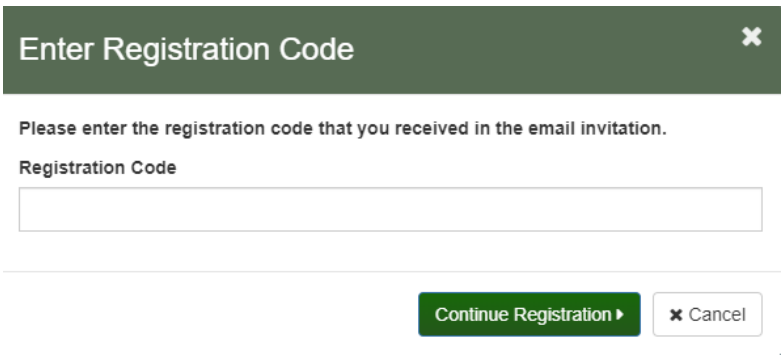
1. Once you have gotten the registration code/token ID from your JC, go to the EFS login page.




2. Click on the blue “Create an account” button.
3. **Choose a role**. Click on the green box labeled “Statement of Economic Interest (SEI) Filer”



4. **Registration Code.** You can now enter the registration code (shown as the Invite Token ID in the JC's account).

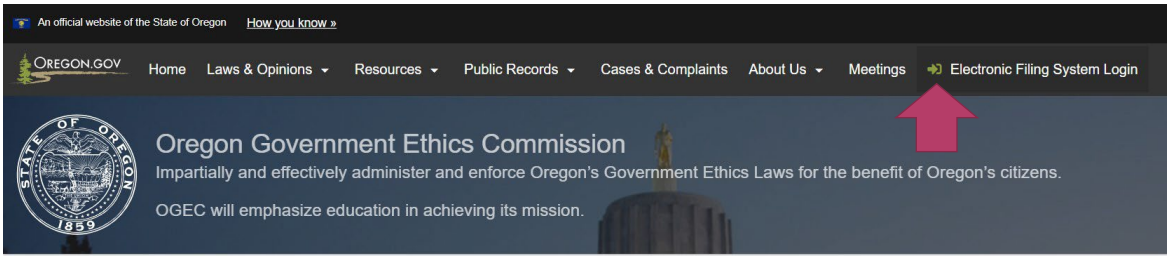



5. You will be taken to the **Create a new Account** screen. Please follow the instructions above.

## MANAGING YOUR EFS ACCOUNT

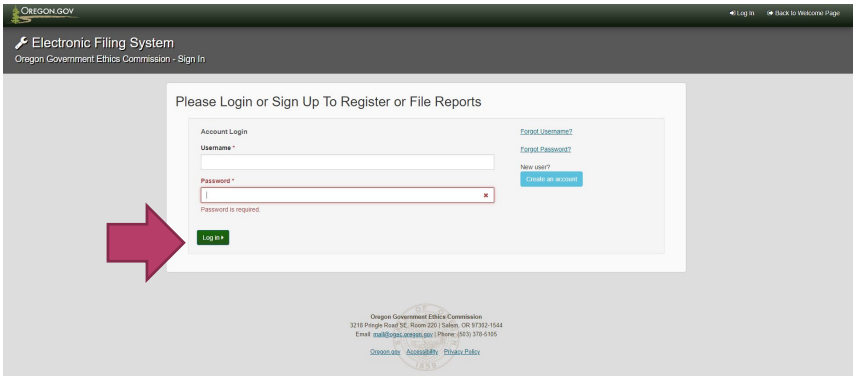
### LOGIN

1. Go to OGEC's website www.oregon.gov/ogec
2. Click on "Electronic Filing System Login" at the top right of the screen.



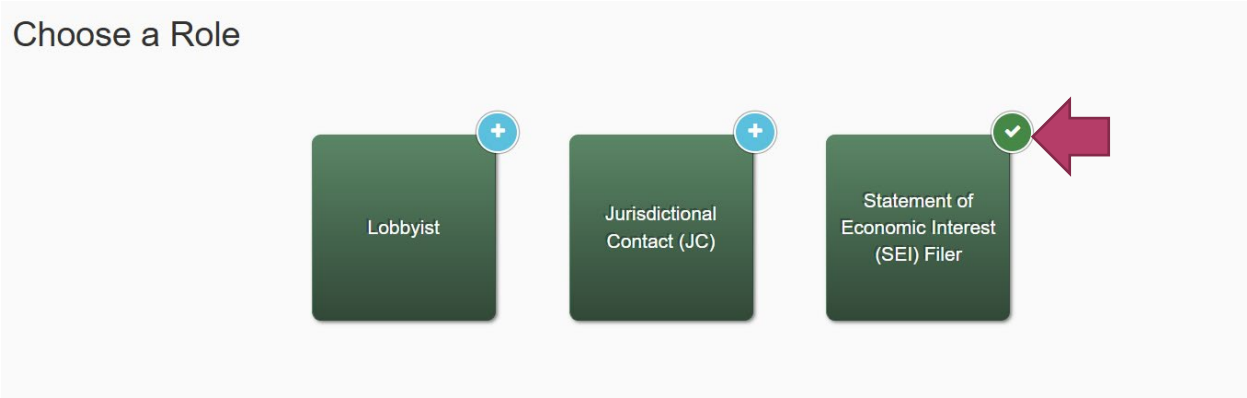

3. You will be re-directed to the Electronic Filing System (EFS) login page.

4. Enter your login information and click on the green **Log in** button.



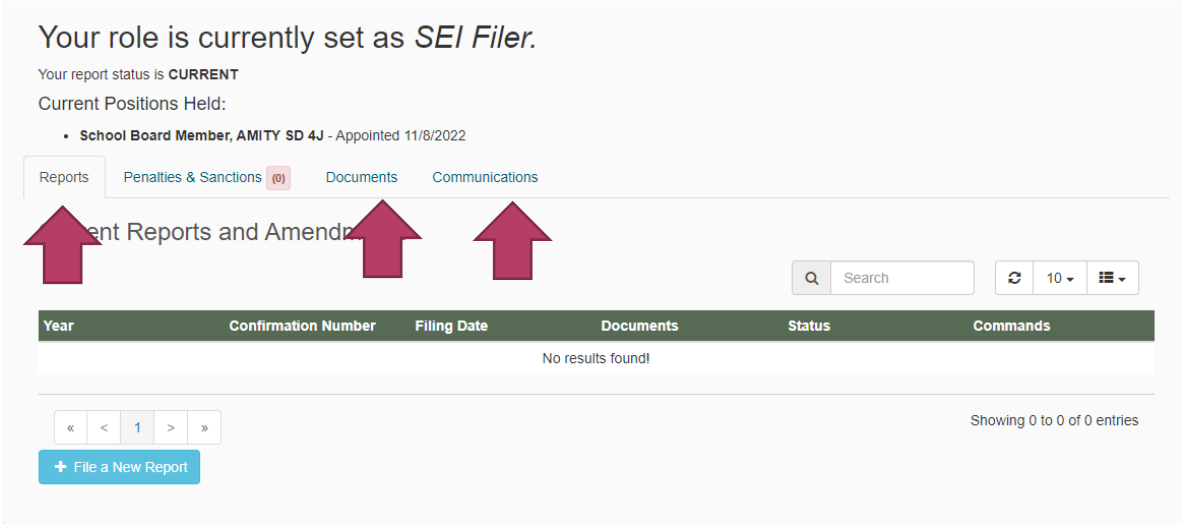

5. **Choose Role.** Select your role. Available roles have a green checkmark. Roles that may be added have a blue plus mark.

   Select the **Statement of Economic Interest (SEI) Filer** role to get to the SEI dashboard.



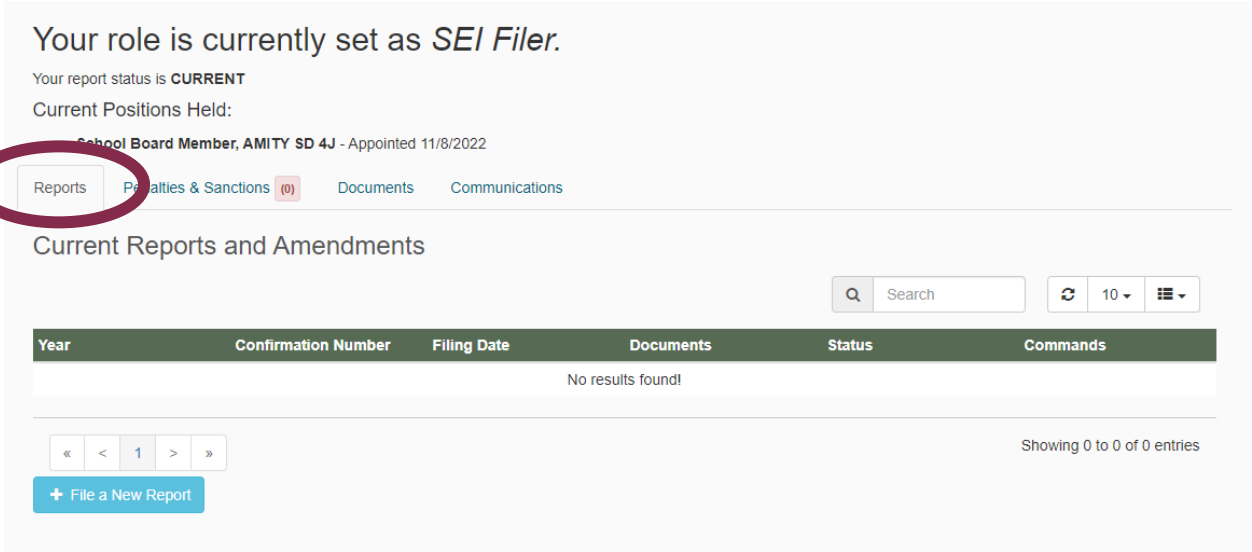

## DASHBOARD

The Dashboard provides access to your SEI, any **Documents** uploaded to support your SEI, and all email **Communications** sent by EFS.

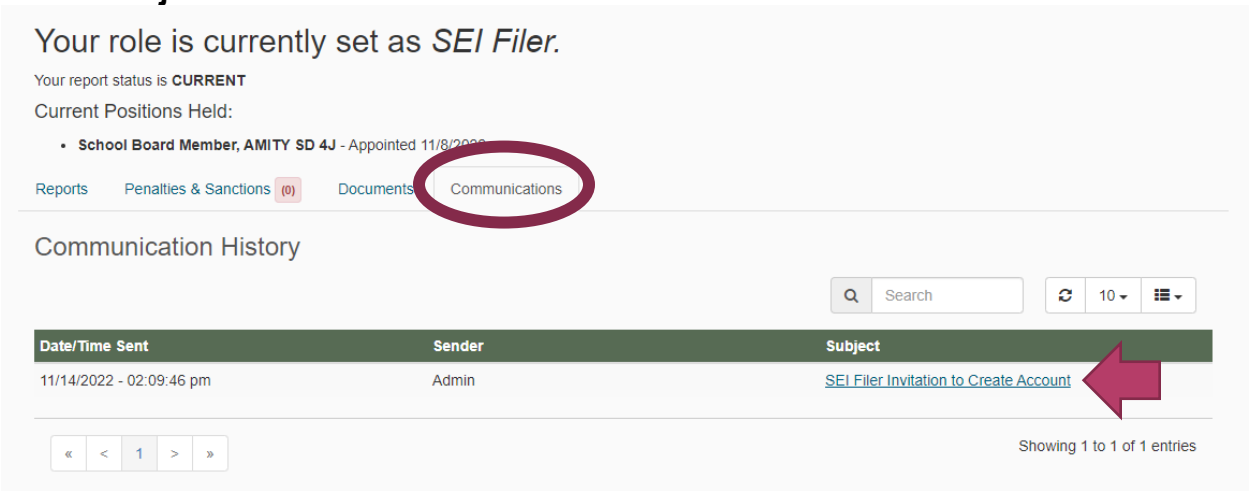


If you hold other roles, you will have a separate dashboard for each of those roles.

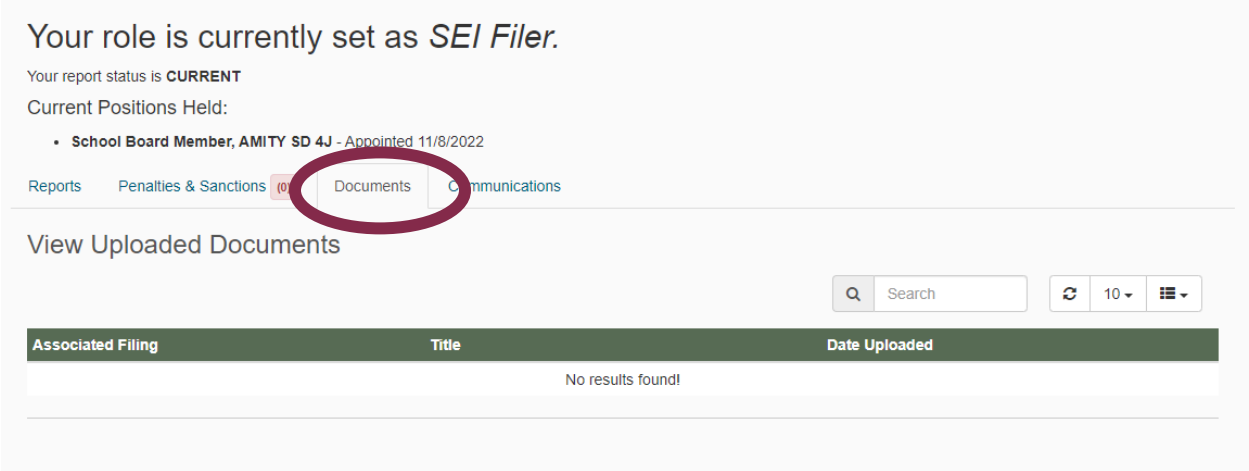
1. Navigate between views, i.e. Reports, Documents and Communications, of your dashboard by clicking on the tab names. The default view will be the **Reports** tab.




2. Email notices sent by the EFS can be viewed in the **Communications** tab. Click on the **Subject** link to view the text of the communication.



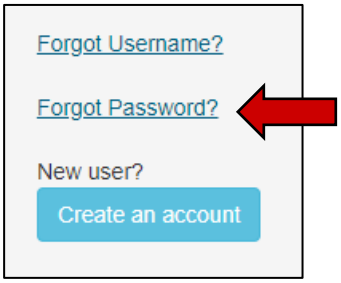

3. **Documents** are anything provided to the agency as part of your report filing. If the system does not allow you to directly upload your required documents you will need to electronically send them to the Commission at: mail@ogec.oregon.gov noting the SEI filer name, jurisdiction, report year, and a request that the document be attached to your filing. The OGEC Administrator will then attach the document to the filed report. Documents may be viewed through the **Documents** tab.




## FORGOT PASSWORD

Contact OGEC staff at: 503-378-5105 / mail@ogec.oregon.gov to request a password reset. You will then be able to change your password and update the security questions on your account.

**OR**




1. From EFS login page, select the **Forgot Password?** navigation link.
2. **Forgot Your Password** window displays.
3. **Enter your username.** Select 

4. **Answer security questions.** Security question answers are case and space sensitive.

   **NOTE:** If your security question answer contains more than one word, you will need to remember to include all spaces, punctuation, and special characters that you used.

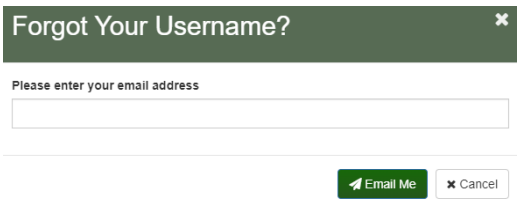
5. **Select a new password.** Passwords are case sensitive and must contain at least:
   a. 8 characters
   b. one upper case letter
   c. one lower case letter
   d. one number
   e. one special character

**NOTE:** We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.

## FORGOT USERNAME

1. From EFS login page, select the **Forgot Username?** navigation link.

2. In the **Forgot Your Username**? pop-up, enter your email address and click on **Email Me**.




3. You will be routed back to the login page. A system-generated message will appear in the body of the page. The message should read: "**We found an account for (*your email address*). An email will be sent to that address**."

4. The system will generate an email from ogec.notification@egov.com. It will list the usernames associated with the email address used. If you have multiple accounts (such as a JC account and SEI filer account), we recommend contacting OGEC staff for assistance.

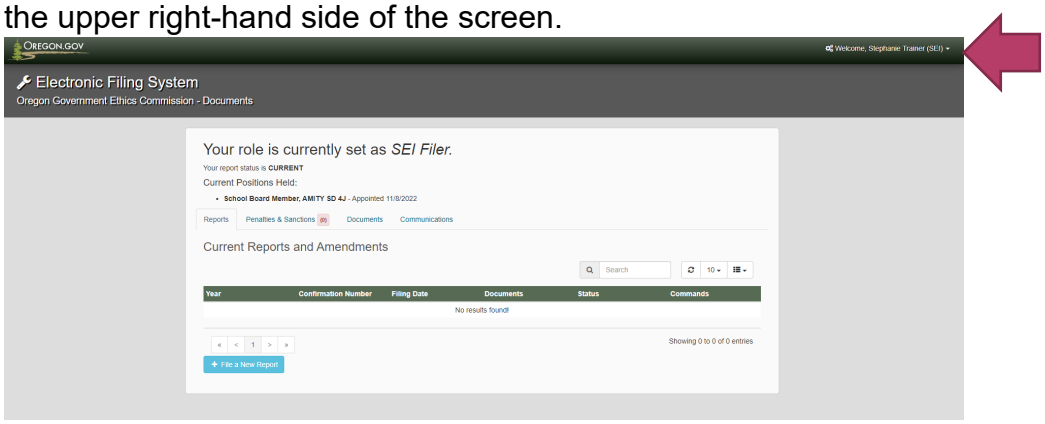
5. Any questions or issues, please contact OGEC staff.

## EDITING/UPDATING ACCOUNT INFORMATION

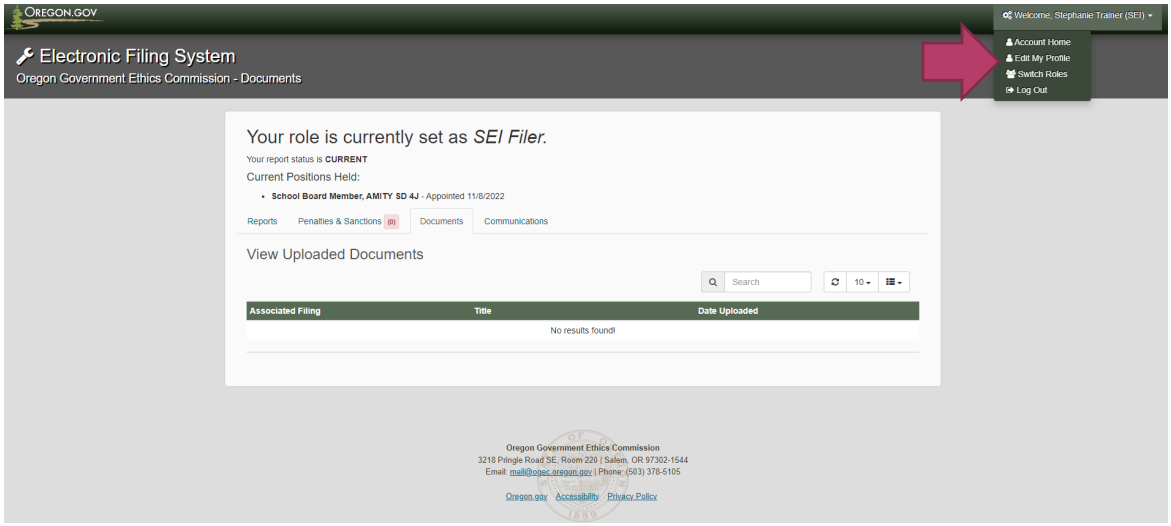
It is your responsibility to keep your personal information, such as mailing address or email address, current in your EFS account.

**NOTE:** You can edit only your own personal profile information. You cannot substitute another individual to complete your filing or to maintain your profile information.

1. Click on the down arrow next to the **Welcome, First Name Last Name (SEI)** line on the upper right-hand side of the screen.

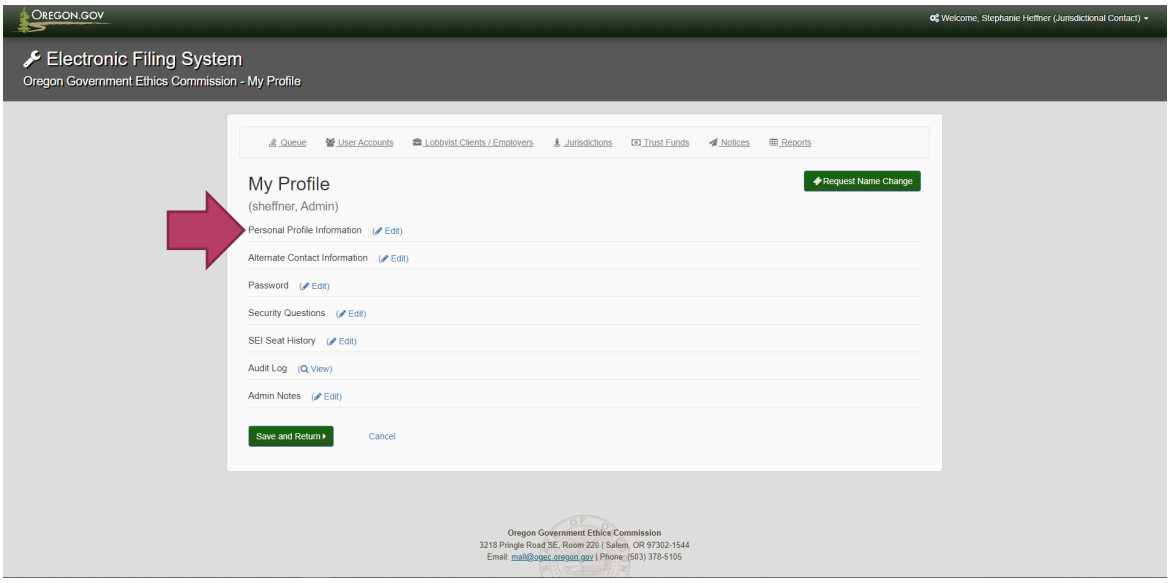


2. A drop down menu will appear. Click on **Edit My Profile.**

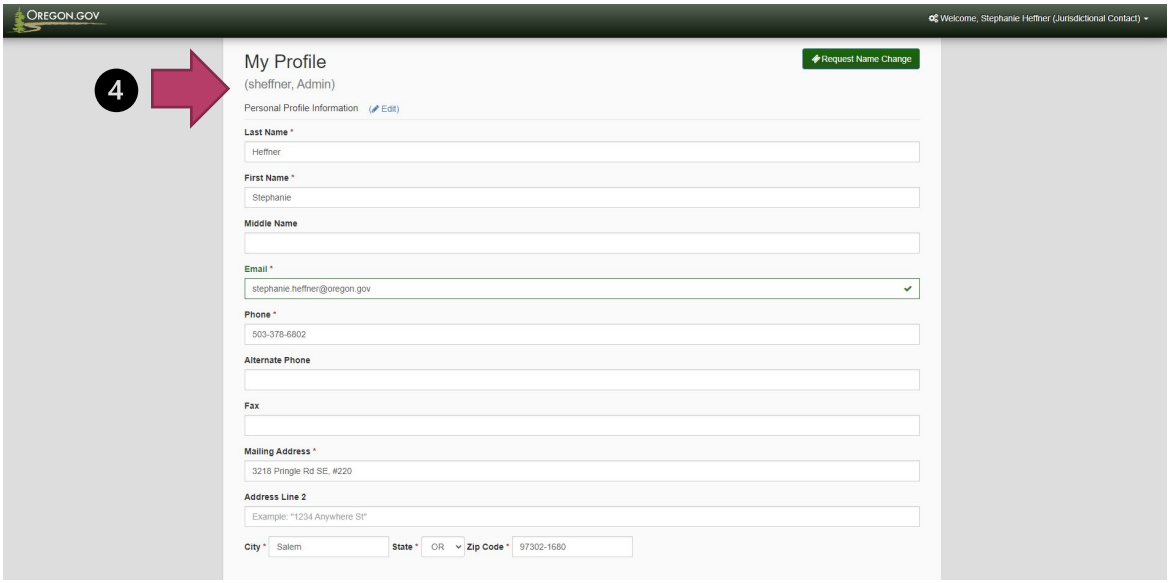



## UPDATING CONTACT INFORMATION

3. In **My Profile** click on the **Edit** next to **Personal Profile Information.**




4. **Update your profile information.** Please make sure your name, email, phone number, and mailing address are correct. You will only be able to update your email, phone number, and mailing address. If you need a name change, please contact OGEC or click on the green **Request Name Change** button.

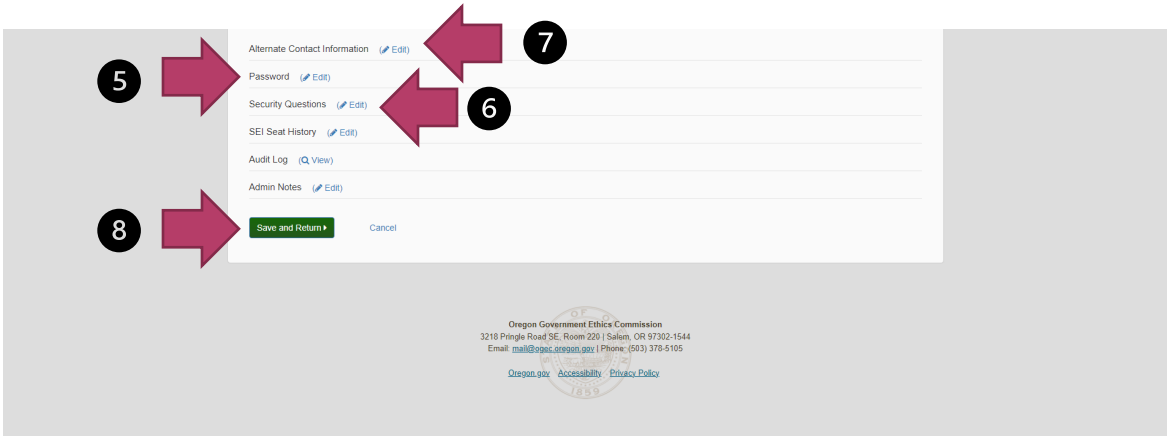



## UPDATING PASSWORD

5. **Passwords** must have a minimum of:

- ✓ One upper case letter
- ✓ One lower case letter
- ✓ One numerical digit
- ✓ One special character (*See text help for special character list)*
- ✓ Must be at least 8 and not more than 20 characters long

**NOTE:** We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.



## UPDATING SECURITY QUESTIONS

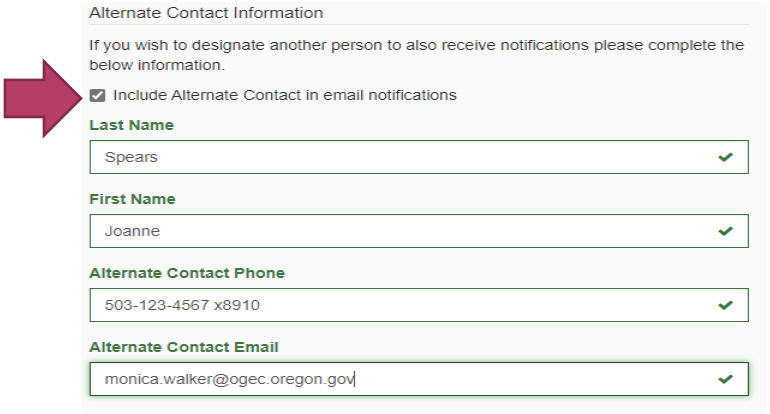
6. **Security Questions.** Click the blue **Edit** option to update your security questions. These are used for password retrieval purposes. The security questions are **case and space sensitive**. If your security question answer contains more than one word, you will need to remember to include all spaces, punctuation, special characters, etc. that you used.

## UPDATING ALTERNATE CONTACT

7. **Alternate Contact Information**. Click the blue **Edit** option to update your alternate contact information. You have the option to identify an alternate contact person to receive the same system-generated email notifications that you will receive.

   The Alternate Contact will only receive copies of your notices. They will not receive any links, nor will they be able to login to your account.

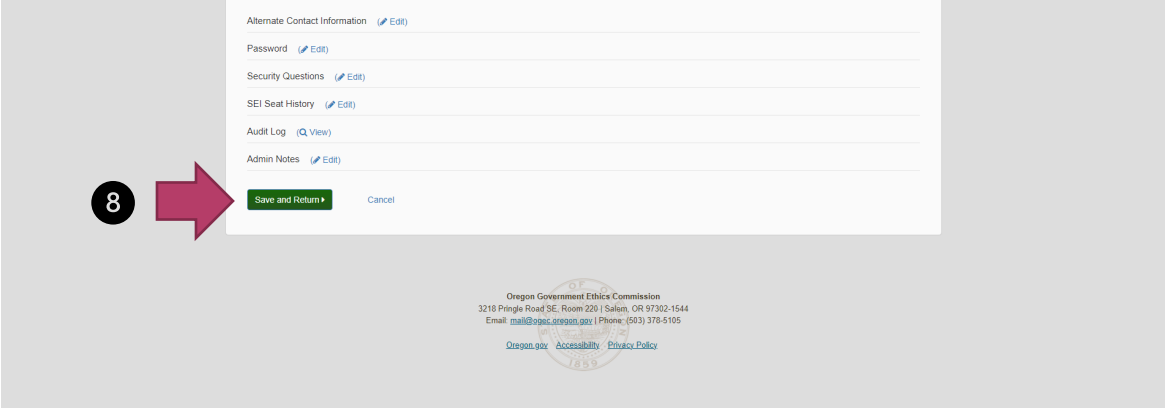
   **FIRST:** Be sure to check the box to include the designated alternate contact in email notifications. Then you can enter the contact's information. If you do not check the box first, they will not receive copies of the emails.




   It is recommended that you list an alternate contact to ensure that important dates are not missed, and tasks are completed on time.

## SAVE CHANGES

8. **Save and Return.** Click on this green button when you have finished updating your account information.




## DATE OF APPOINTMENT

The JC enters the date of appointment/election information when inviting you to create an account profile. If you believe that it is incorrect, contact the JC for your jurisdiction and ask them to make the correction.

Because EFS started in 2016, no one will have an appointment date prior to 2016.

All school board members will have an appointment date of 1/1/2023 or later. This is because 2023 was the first year that school board members were required to file.

## RESIGNING FROM POSITION

Contact the JC assigned to the jurisdiction(s) in which you are elected or appointed by and advise them of your resignation.

You will not have the option of resigning and removing yourself in EFS.

If you hold the position and are seated on April 15th of the required filing period, you will be responsible for filing the required SEI report for that year.

Examples:

- If you held a position anytime starting April 16th, 2024 and were still in the position on April 15th, 2025, you are required to file an SEI.
- If you held a position anytime starting April 16th, 2024 BUT resigned and vacated your position on or before April 14th of 2025, you are not required to file.

Once the JC has removed you from the assigned position, you will receive a system-generated email advising you of this action.

## FILING AN SEI

SEIs are filed annually. The due date is April 15th of every year.

The reporting period opens March 15th. If you have an SEI reporting requirement, you will not be able to file until the reporting period opens.

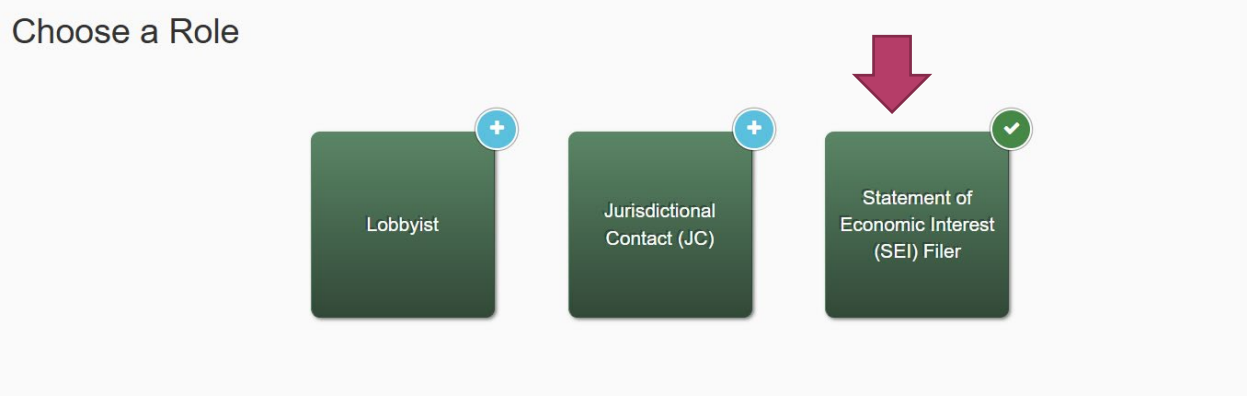
You will receive an email notice from EFS sent to the email address you have on file in your account to let you know the filing period has opened.

If you do not hold the office on April 15th of the current year, you will not be required to file an SEI report. Please make sure that the JC has removed you from the seat assignment prior to April 15th, otherwise you could receive late filing penalties.

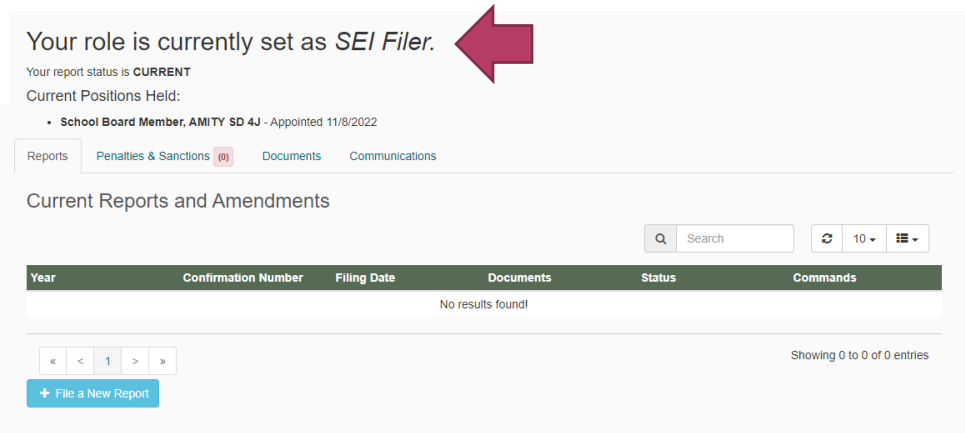
**NOTE:** Filing requirements are based on the appointment date entered by the JC. The system will determine if there is a filing requirement and make the option available. If there is no filing requirement, the option to file will not be available.

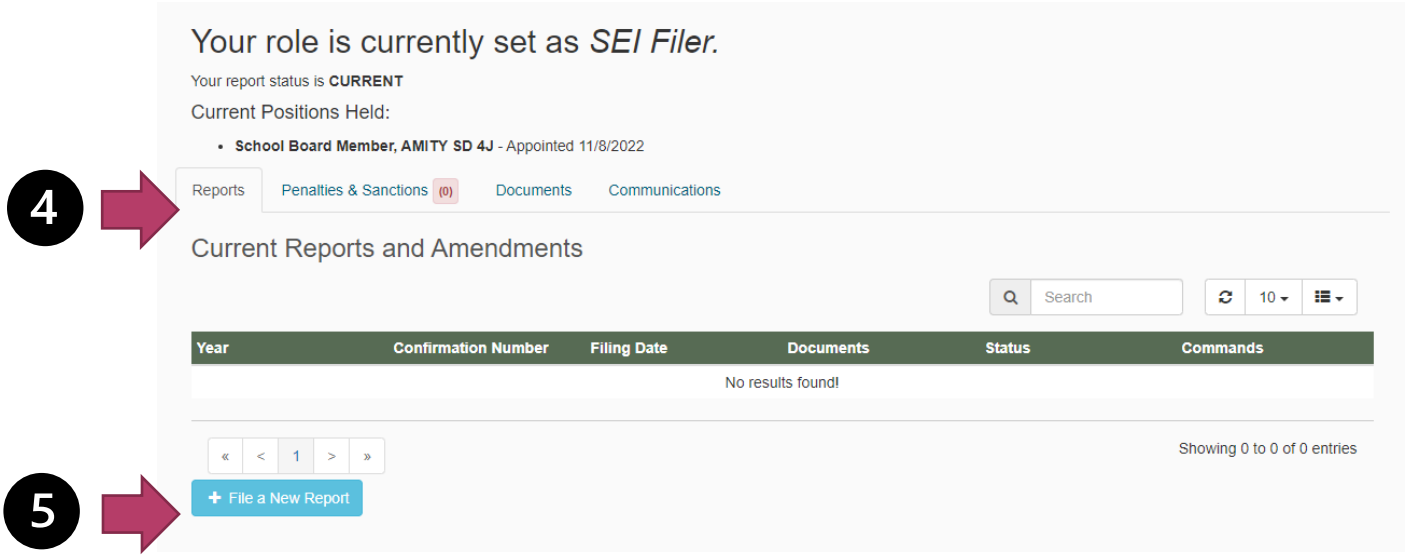
1. **Login.** Login to EFS at: https://apps.oregon.gov/OGEC/EFS

2. **Choose a Role.** Select the "Statement of Economic Interest (SEI) Filer" role.




3. Verify your role is set as **SEI Filer**.






4. The dashboard should be defaulted to the **Reports** screen.

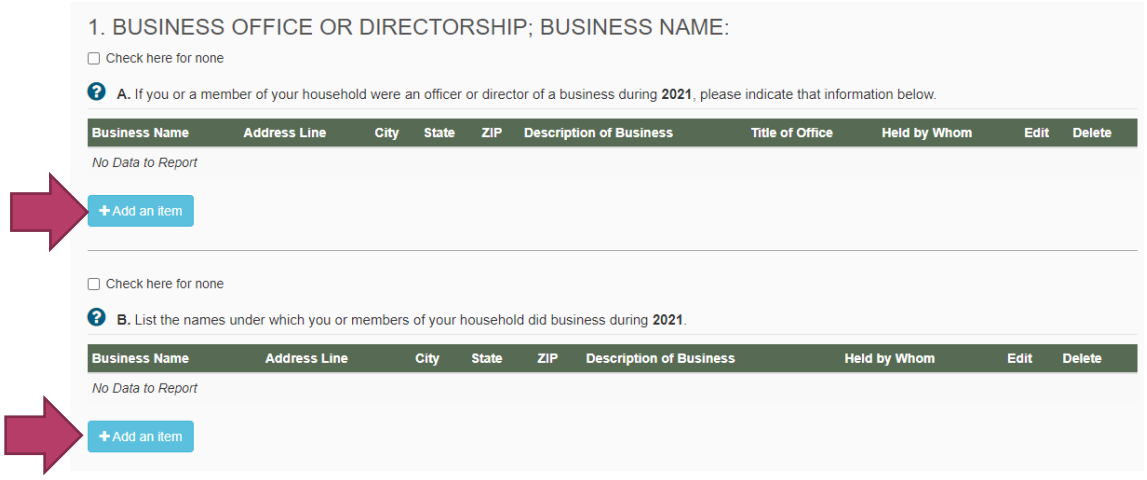
5. Click on blue **+ File a New Report** button.

   During the reporting period beginning March 15th, you will have access to complete the current year's SEI. If you try to file a new report and it is NOT during a reporting period or you have already completed your current report, the following message will display: **No new reports are due at this time**.

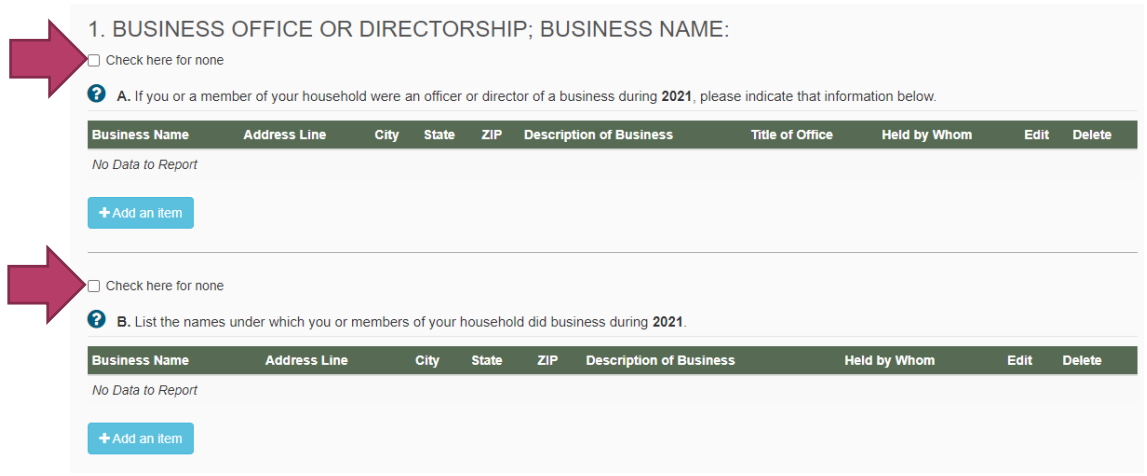
6. If you filed an SEI last year, the system will pre-populate with the information you entered for the previous year's SEI. Thoroughly review and make any necessary changes.

## FILING TIPS

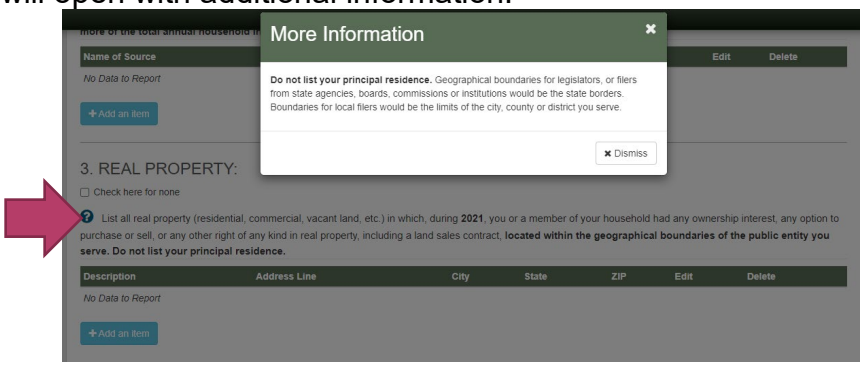
1. To answer each question on the report, click the **Add an Item** button. You may enter as many items as necessary. Each new row will be added to your report independently. Some questions may have multiple sections, each section will require information to be added separately. See below Question 1A and 1B.



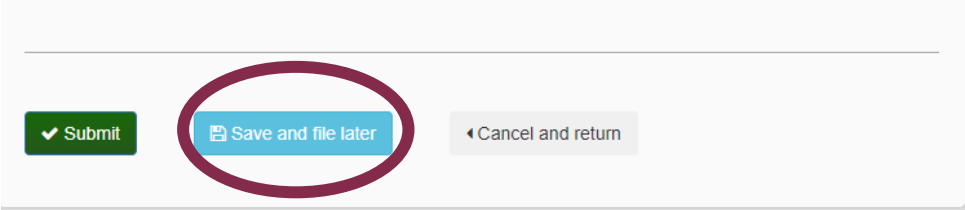

2. **Nothing to report.** If you have nothing to report for a section, select the "**Check here for none"** checkbox. If the question has multiple sections, and you have nothing to report, you will need to select the "**Check here for none**" boxes for each section.



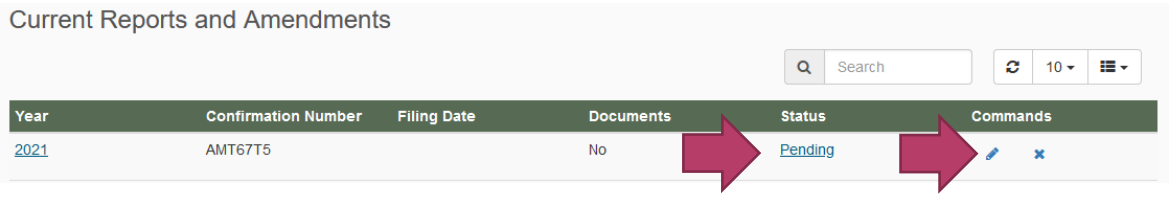

3. For additional help on any section of the form, select the icon and a pop-up window will open with additional information.



4. If you must stop before completing the form, and would like to return to file later, scroll to the bottom and select **Save and file later**. The system does time out after fifteen minutes of inactivity and **does not automatically save**. If you step away from filing, please make sure to save so you do not lose your completed answers.




5. When you save the report, you will see it display with a **Pending** status in the **Reports** tab of the dashboard. You may edit the saved report at any time by selecting the **edit icon -** in the row the report is in.




**NOTE:** Completed **reports are due by April 15th**. A **Pending** report will not qualify as a completed and filed SEI report.

## QUESTION 1: BUSINESS OFFICE OR DIRECTORSHIP; BUSINESS NAME:

SEI filers are required to list any businesses in which they or a member of their household maintained a position as an officer or director and/or list the names under which the filer or members of their household did business, at any time during the preceding calendar year.

- These would be personal business ventures, **not the public position you hold.**
- A business is not a government entity/public body, or a 501(c)(3) nonprofit corporation if you are in a non-compensated capacity.
- This is a two-part question, both sections A and B must be completed, or marked none.

**Listing the clients of businesses** [ORS 244.060(9)]

SEI filers that list business in questions 1A or 1B, must also include any client, customer, investor, or any other entity who the business has a legal, contractual, or other business relationship if:

1. They have contributed 10% or more of the business' total gross annual income,
2. **And** they have a legislative or administrative interest in your public official position, or they have been or could reasonably be doing business with the governmental agency with which you are associated.

Additional steps for those who have a **statutory obligation to keep their clients' information private**:

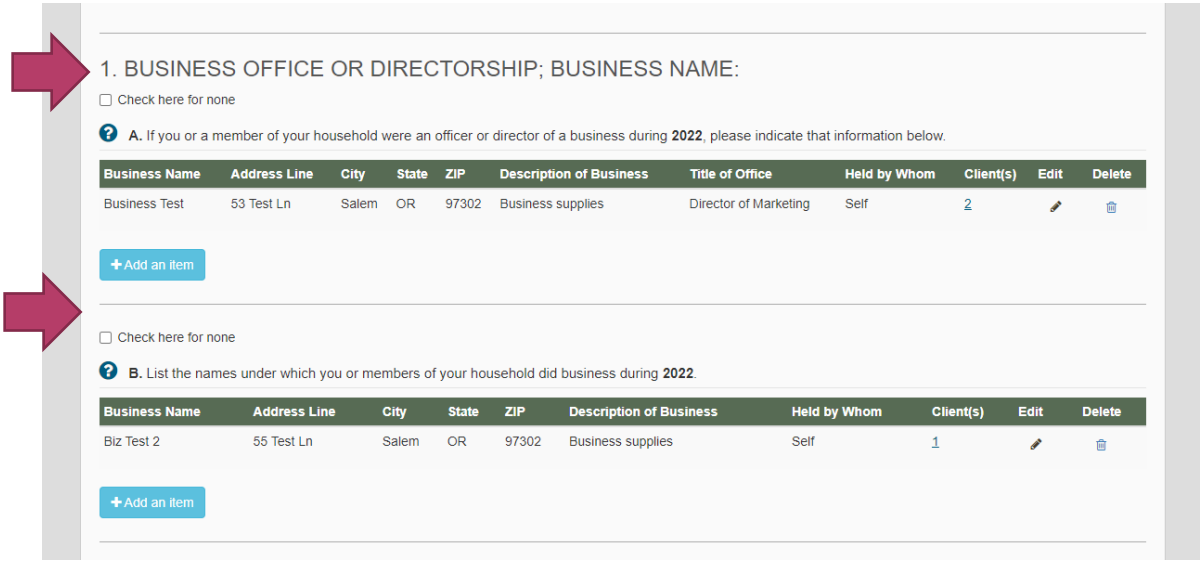
1. You are required to contact your client and request permission to share their information.
2. **AND** Affirm in the SEI report that you have made the client request (by providing an electronic signature) for each required request.
3. **IF** the client gives you permission, you will need to provide their information in the client information section.

**A.** If you or a member of your household were an officer or director of a business (see definition of "business") during 2024, please indicate that information below.

You will list the:

1. **Business Name**
2. **Title of Office**
3. **Business Address**
4. **Held by Whom**
5. **Description of the Business**

If you have nothing to report, click the box **Check here for none (see below)**.



**B.** List the names under which you or members of your household did business (see definition of "business") during 2024:

- Items A and B may be the same and Item B may be subsidiary of parent company listed in Item A. [ORS 244.060(1) & (2)]

You will list the:

1. **Business Name**
2. **Title of Office**
3. **Business Address**
4. **Held by Whom** (relationship to the Public Official, i.e. self, spouse, son, daughter, etc.)
5. **Description of the Business**.

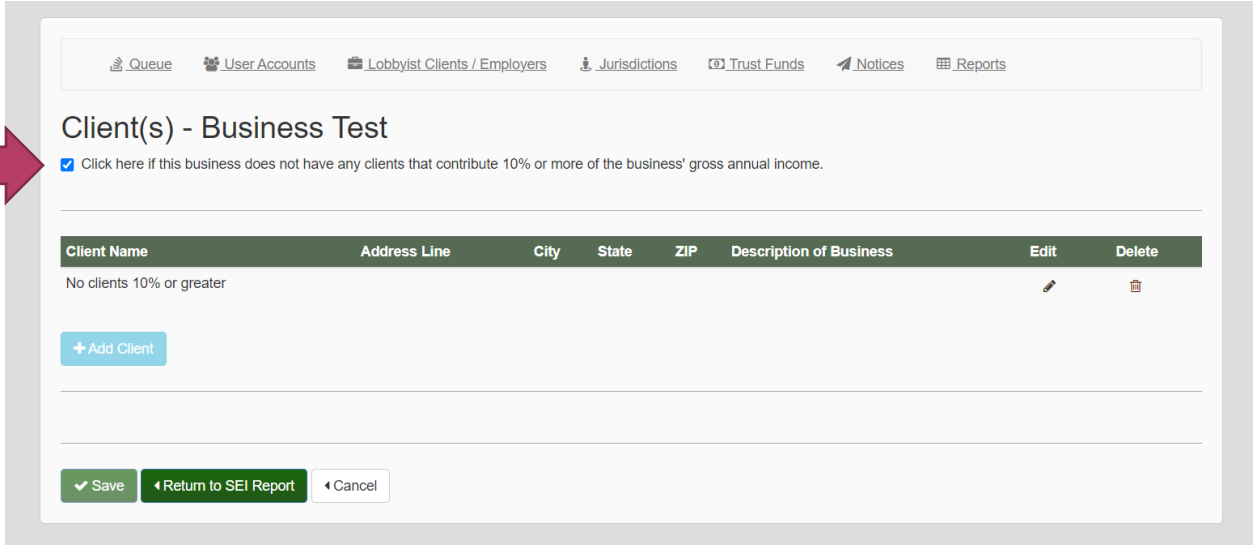
If you have nothing to report, click the box **Check here for none (see above)**.

After adding a business to either 1A or 1B, you will be directed to the client input page. [ORS 244.060(9)]

You are required to list clients, customers, investors, or any other entity who your business has a legal, contractual, or other business relationship if:

a. They have contributed 10% or more of your business' total gross income,
b. **AND** they have a legislative or administrative interest in your public official position, or they have been or could reasonably be doing business with the governmental agency you are associated.

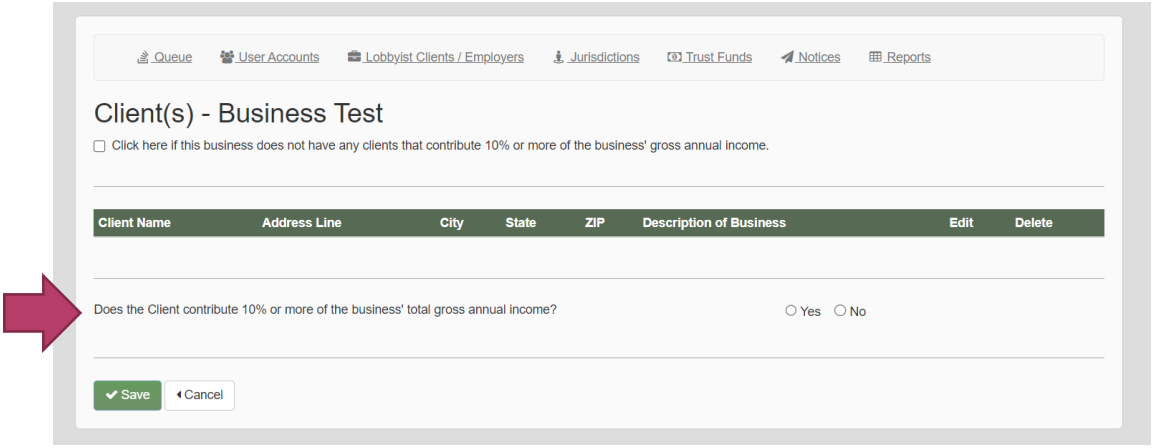
**No Clients to List:**



1. For those who do not have **any** clients that contribute 10% or more of the business' gross annual income, please select the "Click here if this business does not have any clients that contribute 10% or more of the business' gross annual income" box below the Client(s) – Business Name section.
2. Click **Save** button and the screen will update to show a listing of "No clients 10% or greater".
3. Use the **Return to SEI Report** button to return to your report and complete the remaining sections.

**Listing Clients:**

The SEI filer will need to report **EACH** client that contributes 10% or more of the business' gross annual income. Please answer the following questions for one client at a time.



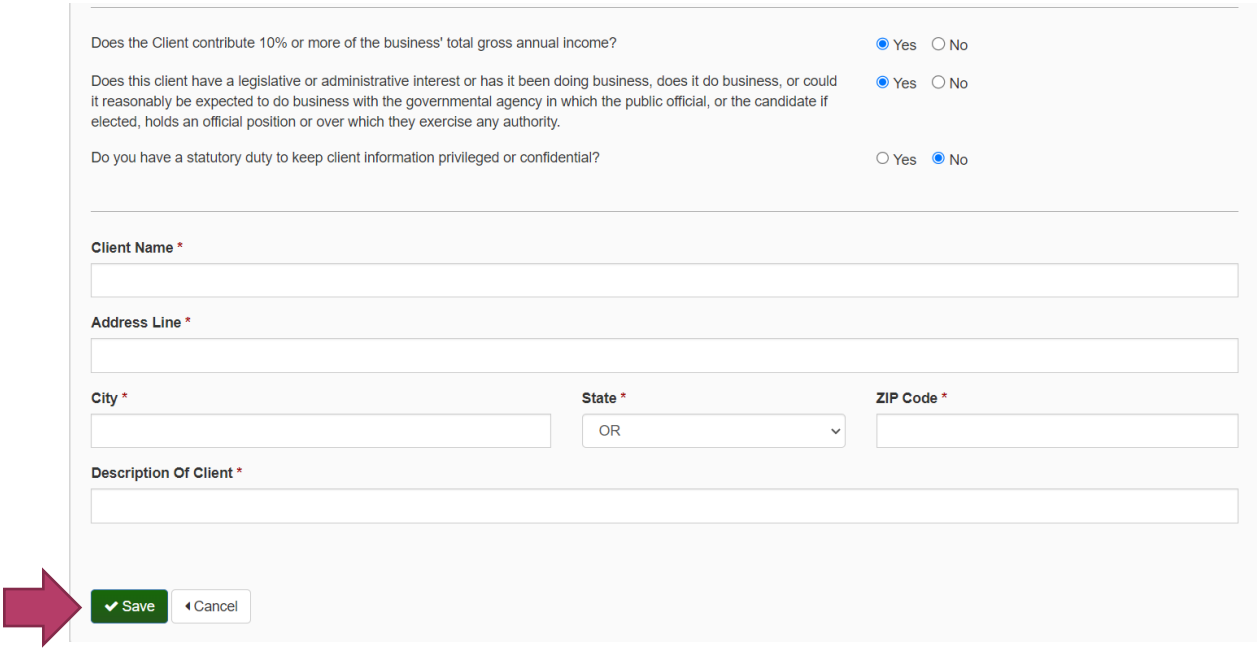

1. Question 1: If the business listed in question 1A or 1 B has a client that contributes 10% or more, answer **Yes** to the first question.
2. Question 2: Does the client have a legislative or administrative interest or has been doing business, does business, or could reasonably be expected to do business with the governmental agency in which the SEI filer holds an official position or over which they exercise any authority?
    a. If the answer is **No**, you will not be required to enter any additional information about this client.
        I. Click the **Save** button at the bottom of the screen if you have no additional clients to report.

        *You must save before returning to the SEI report, or you may lose the information you have added.*

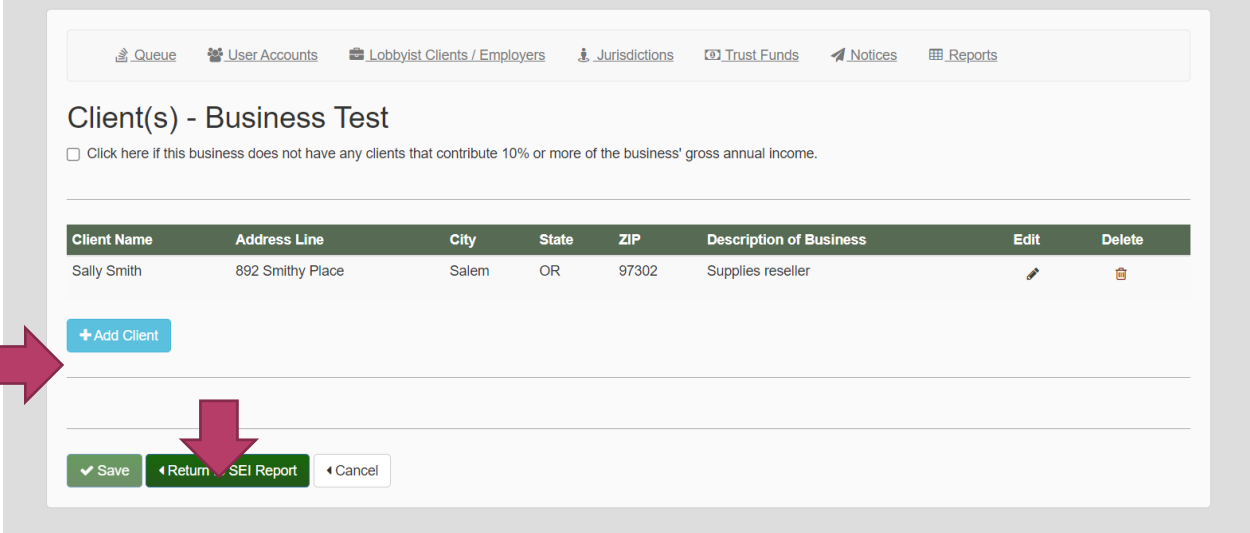
        II. Then click on click on **Return to the SEI Report.**

b. If the answer is **Yes**, the next question will appear.

3. Question 3: Does the filer or household member have a statutory duty to keep the client information privileged or confidential?
    a. If you answer **No**, you will be prompted to provide the client information. You will list:
        - **Client Name**
        - **Client Address**
        - **Description of Client** (business relationship, i.e. client, customer, investor, contractor, etc.)
    b. Click on the **Save** button when finished.

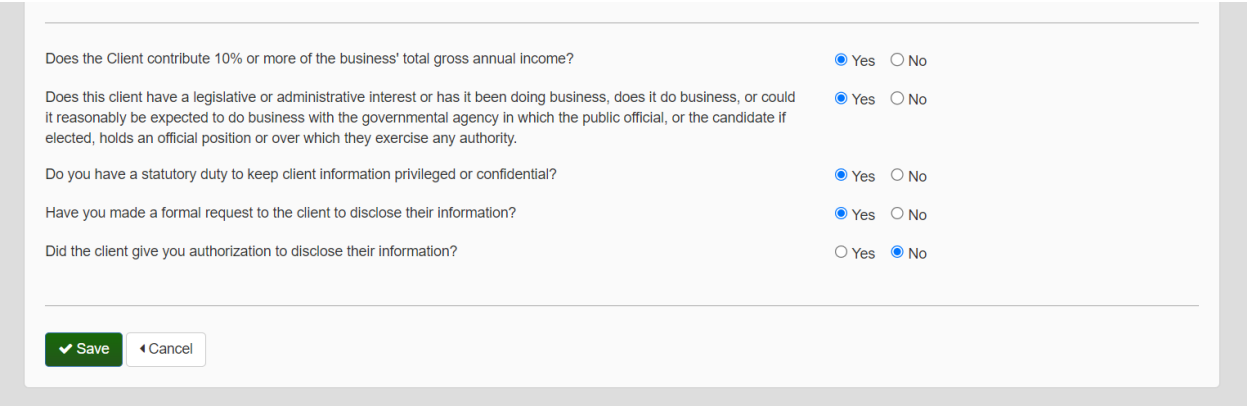



4. When you have saved that information, the client information will now appear underneath the client list.
    a. If you have more clients to add, click on **+ Add Client** button.
    b. If you do not have any additional clients to add, click on the **Return to SEI Report** button.




**Confidential Client Information:** For SEI filers or household members that have a statutory duty to keep their client information confidential or private, ORS 244.060(9) requires that:

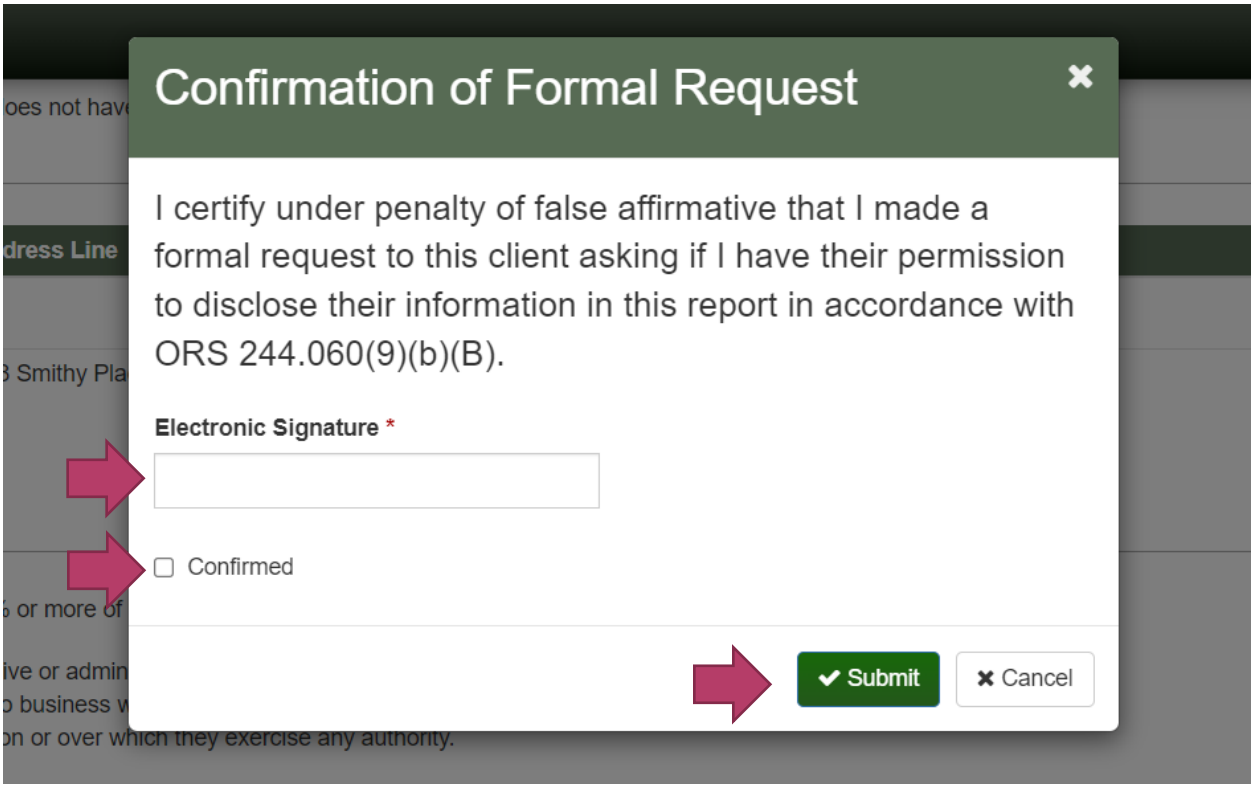
1. You make a formal request to the client for authorization to share their information.
2. Once that formal request has been made, you must select whether they have authorized you to release their information or not.




**Whether they have authorized you to disclose their information or not, you will be required to electronically sign that you made the formal request**.

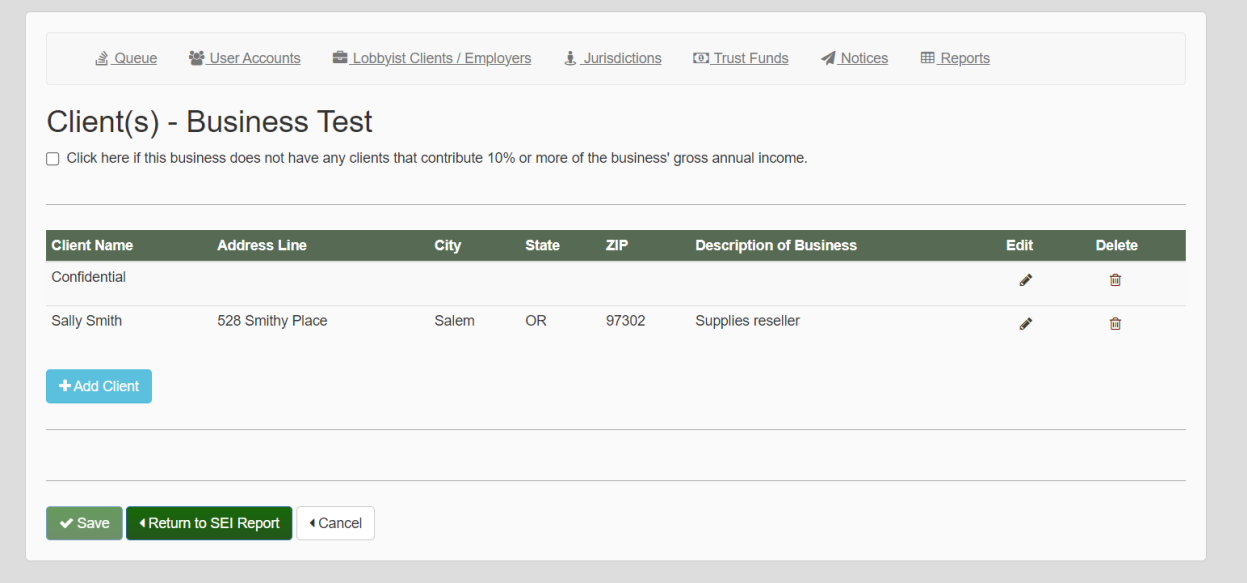
1. **Electronic Signature**: Type your first and last name as it appears in your personal profile (it is displayed on the upper right-hand side of your screen).
2. Click the **Confirmed** box.

3. Click on the **Submit** button to finish the required information for that client.




*You may file your SEI report without their response now and amend it after filing, when you have received their response. If you need assistance amending your SEI, please contact OGEC.*

Clients who did not authorize their information being released will show as “Confidential” while those who authorized the release of their information will have all information shown:

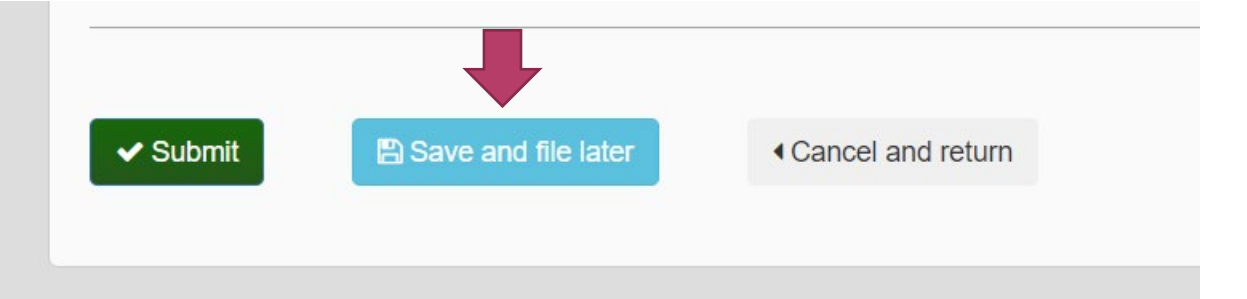



Repeat these actions as needed to continue filling out sections 1A and 1B.

**Editing Client Information:** For those who have added new businesses into this year's SEI, you can edit client information from the main page, by simply clicking the underlined number beneath the Client(s) column:



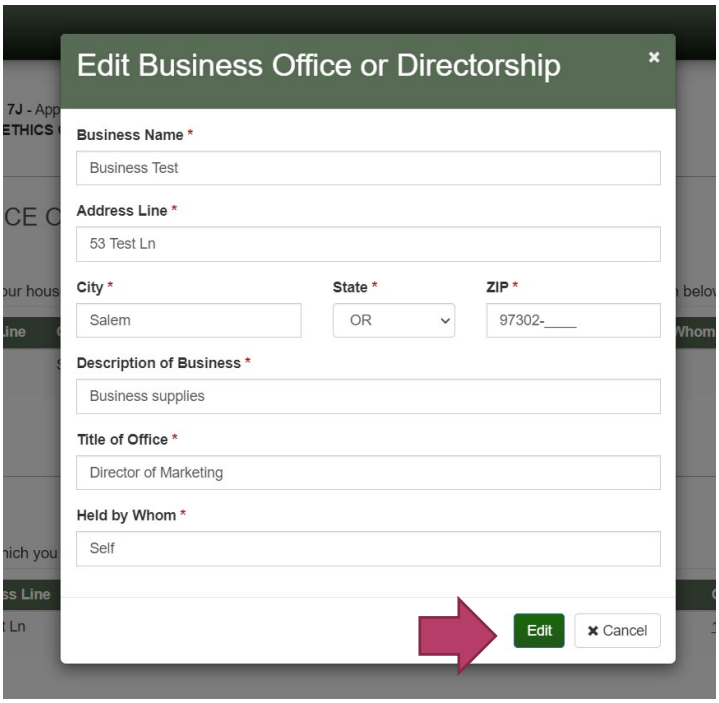

Please make sure to hit the "Save and File Later" button at the bottom of the report before editing client information if you have added information into questions 2-10.



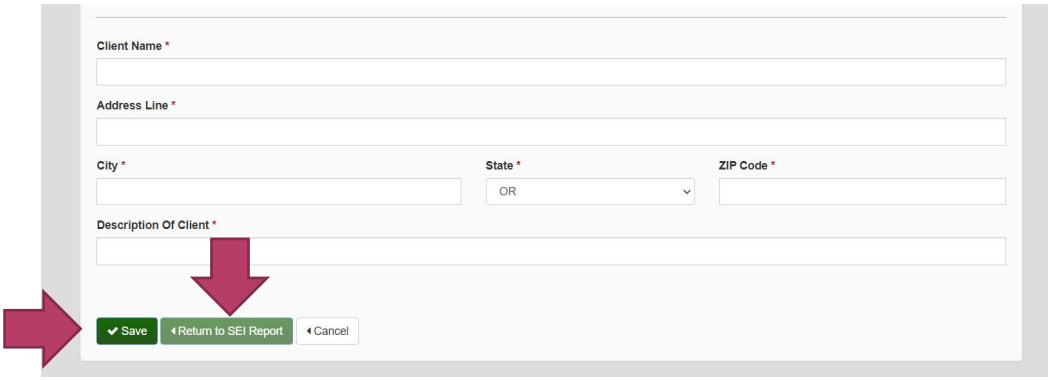
For those who have businesses that were imported from last year's SEI and are showing a "0" in the Client(s) column, please edit client information by selecting the pencil beneath the Edit Column.




You will be prompted to edit the business information and will need to select "Edit".




This will take you to the client screen where you can edit client information without receiving an error message. Be sure to select "Save" after entering client info and then "Return to SEI Report" to return to editing the report.




## QUESTION 2: SOURCES OF INCOME

SEI filers are required to list all sources of income (not the amount of income) that made up 10% or more of their total annual household income in 2024. This includes any household member who is 18 years of age or over. [ORS 244.060(3)]

- Businesses are sources of household income, not the individual clients of the business.
- Do not leave this question unanswered. Everyone should have some source of income from an employer, a business, Social Security benefits, retirement benefits, Veteran benefits, etc.

You will list:

1. **Name of the Source**
2. **Address of the Source**
3. **Description of the Source**

Examples:

*Salem Hospital; 1234 Oak St., Salem OR; Husband's salary*

*ABC LLC; 1234 Pine St, Medford OR; Rental Property income*

## QUESTION 3: REAL PROPERTY

List all real property *(residential, commercial, vacant land, etc.)* located within the geographical boundaries of the jurisdiction you serve, **other than your principal residence**, in which you, the SEI filer, or your household members had, in 2024, any ownership interest, any option to purchase or sell, or any other right of any kind in real property, including a land sales contract. [ORS 244.060(4)]

- Boundaries for legislators, or filers from state agencies, boards, commissions or institutions would be the state borders. Boundaries for local filers would be the limits of the city, county or district you serve.

You will list:

1. **Description of the real property**
2. **Address**

- Examples of real property descriptions: Rental property, farmland, vacant land, vacation home, etc.

If you have nothing to report, click the box **Check here for none**.

## QUESTION 4: OFFICE RELATED EVENTS

SEI filers are required to list the amount of any expenses with an aggregate value exceeding $50 that were paid by a source other than the jurisdiction they serve during the preceding calendar year for participating in a fact-finding mission or trip under the gift exceptions in ORS 244.020(7)(b)(F) and ORS 244.020(7)(b)(H).

**A.** List the amount of any expenses with an aggregate value exceeding $50 provided to you during **2024**, where the expenses were paid by a government entity, Native American tribe, membership organization or nonprofit organization for you to participate in a convention, mission, trip, or other meeting as permitted under ORS 244.020(7)(b)(F). [ORS 244.060(5)]

- Do not list expenses that were paid by the public body you represented.
- This is one of the two instances in which the SEI filer is required to upload a receipt to their annual SEI. The paying entity should provide the public official a receipt of the costs within 10 days of the date that the expense occurred. [ORS 244.100]. You will have the opportunity to upload the document at the end of the SEI.

You will list:

1. **Date(s) of Event**
2. **Organization Name** (who paid for the expenses)
3. **Address**
4. **Nature of Event**
5. **Amount** (as listed in the receipt)

If you have nothing to report, click the box **Check here for none**.

**B.** List the amount of any expenses with an aggregate value exceeding $50 provided to you during 2024 to participate in a fact-finding mission, negotiations, or economic development activities described in ORS 244.020(7)(b)(H). [ORS 244.060(6)]

- These events are those that were officially sanctioned or designated by your public body.
- Do not list expenses that were paid by the public body you represented.

You will list:

1. **Date(s) of Event**
2. **Organization Name** (who paid for the expenses)
3. **Address**
4. **Nature of Event**
5. **Amount**

If you have nothing to report, click the box **Check here for none**.

## QUESTION 5: HONORARIA

List all honoraria *(see definition)* allowed in ORS 244.042, with a value exceeding $15, received by you or a member of your household during 2024. [ORS 244.060(7)]

You will list:

1. **Date**
2. **Organization Name**
3. **Nature of Event**
4. **Amount**

Under ORS 244.100(2) any person that provides a public official or candidate, or a member of the household of the public official or candidate, with an honorarium or other item allowed under ORS 244.042 with a value exceeding $15 shall notify the public official or candidate in writing of the value of the honorarium or other item. The person shall provide the notice to the public official or candidate within 10 days after the date of the event for which the honorarium or other item was received.

- This is the second of the two instances in which the SEI filer is required to upload a receipt to their annual SEI. You will have the opportunity to upload the document at the end of the SEI.

If you have nothing to report, click the box **Check here for none**.

## QUESTION 6: SHARED BUSINESS WITH LOBBYIST

List the name of any compensated lobbyist who was associated with a business with which you or a member of your household was also associated during 2024. If any business listed in response to Questions 1A, 1B, or Question 2 on the SEI paid a lobbyist who is registered in EFS to lobby in Oregon, then the SEI filer would list those businesses here. [ORS 244.090(1)]

- Owning stock in a publicly traded company in which the lobbyist also owns stock is not a relationship that requires disclosure.
- *Example: The public official or household member is an employee or owner of a private company that also employs a lobbyist.*

You will list:

1. **Name of the Lobbyist**
2. **Name of the Business**
3. **Type of the Business**

If you have nothing to report, click the box **Check here for none**.

***PLEASE NOTE – DO NOT answer items 7, 8, 9, and 10 unless the source of the interest is derived from an individual or business that has a legislative or administrative interest or that has been doing business, does business or could reasonably be expected to do business with the governmental agency of which you hold an official position or over which you exercise any authority.***

***"Legislative or administrative interest" means an economic interest, distinct from that of the general public in any matter subject to the decision or vote of the public official acting in the public official's capacity as a public official.***

## QUESTION 7: INCOME OF $1,000 OR MORE

Respond only if you or a member of your household received income exceeding an aggregate amount of $1,000 during 2024, and that income was derived from an individual or business that has been doing business, does business, or could reasonably be expected to do business with the governmental body you serve, or has a legislative or administrative interest in the decisions or votes that you could make. [ORS 244.060(8)]

You will list:

1. **Income Source**
2. **Address**

3. **Description**

If you have nothing to report, click the box **Check here for none**.

Example: A household member works for a local construction company that actively bids on public work projects in your jurisdiction (city/county/state).

## QUESTION 8: DEBT OF $1,000 OR MORE

Respond only if you or a member of your household owed a debt of $1,000 or more to a person *(see definition of "person")* during 2024, and that debt involved an individual or business that did business with the governmental body you serve or has a legislative or administrative interest in the decisions or votes that you could make. [ORS 244.070(1)]

- Do not list loans from state or federally regulated financial institutions (banks, etc.) or retail credit accounts and do not list the amounts owed.

You will list:

1. **Name of Creditor**
2. **Date of Loan**
3. **Interest Rate of Loan**

If you have nothing to report, click the box **Check here for none**.

Example: A friend who is also the owner of a golf course in your jurisdiction gave you a loan.

## QUESTION 9: BUSINESS INVESTMENT OF $1,000 OR MORE

Respond only if you or a member of your household had a personal, beneficial interest or investment in a business *(see definition of "business")* of more than $1,000 during 2024, and the investment involved an individual or business that did business with the governmental body you serve or has a legislative or administrative interest in the decisions or votes that you could make. [ORS 244.070(2)]

- Do not list the amount of the investment.
- Do not list individual items in a mutual fund or blind trust, or a time or demand deposit in a financial institution, shares in a credit union, or the cash surrender value of life insurance.

You will list:

1. **Business Name**

2. **Address**
3. **Description of the Business**

If you have nothing to report, click the box **Check here for none**.

Example: You have stock investments of more than $1,000 in a local tech company that is active in your jurisdiction.

## QUESTION 10: SERVICE FEE OF $1,000 OR MORE

Respond **only if you** (not your business) received a fee of more than $1,000 in 2024 from a person (see definition of "person") for whom you performed a service, if the service involved an individual or business that did business with the governmental body you serve or has a legislative or administrative interest in the decisions or votes that you could make. [ORS 244.070(3)]

- Do not list fees if you are prohibited from doing so by law or a professional code of ethics.

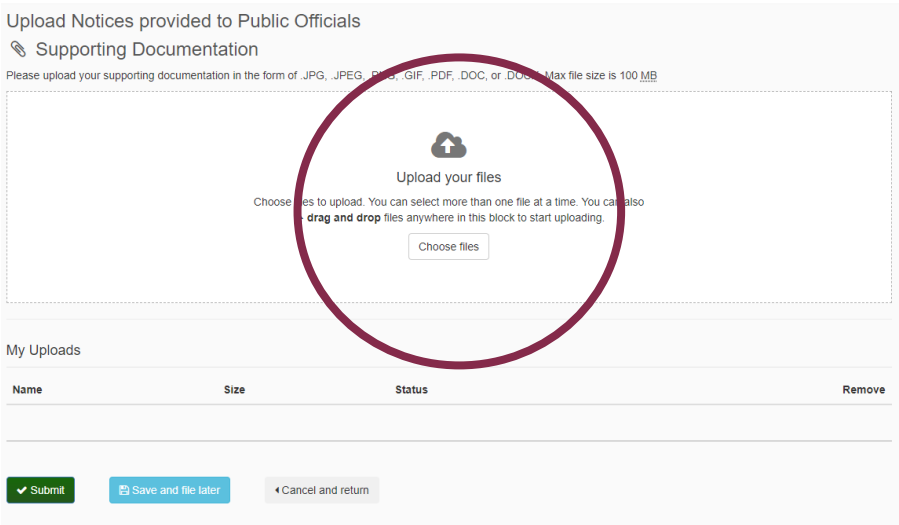
If you have nothing to report, click the box **Check here for none**.

Example: You pay a service fee of more than $1,000 for work done by a local landscaping company that also does work for the public body you serve.

## VERIFY AND SAVE

1. **Supporting Documentation:** Uploading your files

   Only questions 4A. Office Related Events and 5. Honoraria require documentation to be uploaded.



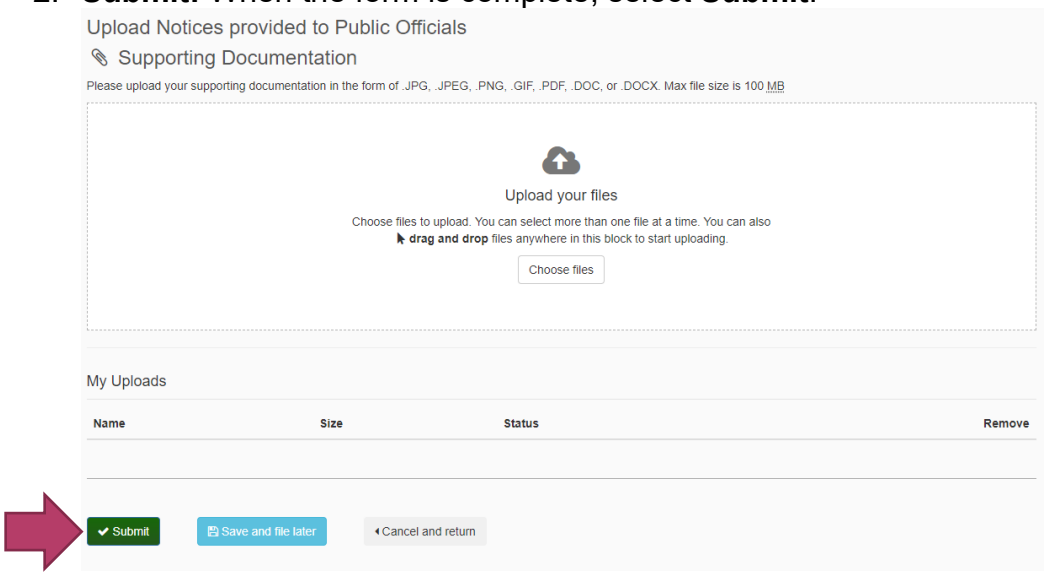
Click on “Choose Files” to select files saved to your device to attach or you can drag and drop files to upload.

If the system does not allow you to directly upload your required documents, you will need to electronically send them to the Commission at: mail@ogec.oregon.gov

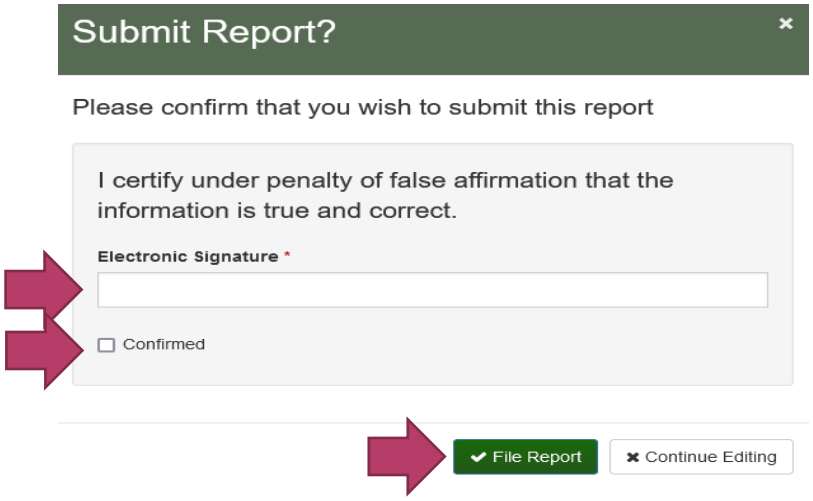
Please include:
1. Name used for your SEI account
2. Jurisdiction you serve
3. Report year (2025)
4. Request that the document be attached to your filing.

The OGEC Administrator will then attach the document to the filed report. Once uploaded, the documents may be viewed through the **Documents** tab.

2. **Submit:** When the form is complete, select **Submit**.




3. **Electronic Signature**. You will be prompted to sign your name to complete the filing. Type your first and last name as it appears in your personal profile (it is displayed on the upper right-hand side of your screen). Click **Confirmed** then select **File Report**.




4. The **Report Successfully Filed** screen will appear. If you do not see this prompt, the system may return you to the portion of the report that needs more information. Once corrected, you can successfully file. If you complete a **Pending** report, you will see the status has changed from **Pending** to **Filed** in the **Reports** tab of the dashboard.




**NOTE:** The **filing deadline is always April 15th,** even if that date falls on a weekend or holiday. The electronic filing system is available 24-hours a day and 7 days a week for your convenience.

## MOST COMMON FILING ERRORS

1. Failing to list all sources of household income on question 2. Sources of Income. All sources of income exceeding 10% of the total annual **household** income must be listed.

a. The term “total annual household income” as used in ORS 244.060(3) means the collective income of all members of the public official’s household for the prior calendar year, but excluding the income of any household member under the age of 18. (OAR 199-020-0023(3))
b. This includes any income from the public position you hold.
c. Salary, pensions, disability benefits, veterans’ benefits, and social security benefits are all examples of household income.

2. Adding information to questions 7 to 10 when not necessary. Please carefully read the instructions in the box. The questions need to be answered only if the conditions described in the instructions apply to your responses.
    a. If you have nothing to add to the individual questions 7 to 10, make sure to click on the “Check here for none” box under each question title.

- **Please do not ignore the email notifications!** ORS 244.350(4)(c) prescribes assessment of a penalty of $10.00 for each of the first 14 days the SEI is late and $50.00 for each day thereafter that passes after the filing deadline date, up to a maximum of $5,000.00.
- You are required to electronically file **no later than April 15.** Please contact OGEC if you have questions.

## STATUTORY REFERENCES

**Item 4-A, ORS 244.020(7)(b)(F)** – Reasonable expenses paid by any unit of the federal government, a state or local government, a Native American tribe that is recognized by federal law or formally acknowledged by a state, a membership organization to which a public body as defined in ORS 174.109 pays membership dues or a not-for-profit corporation that is tax exempt under section 501(c)(3) of the Internal Revenue Code, for attendance at a convention, fact-finding mission or trip, conference or other meeting if the public official is scheduled to deliver a speech, make a presentation, participate on a panel or represent state government as defined in ORS 174.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

**Item 4-B, ORS 244.020(7)(b)(H)** – Reasonable food, travel or lodging expenses provided to a public official, a relative of the public official accompanying the public official, a member of the household of the public official accompanying the public official or a staff member of the public official accompanying the public official, when the public official is representing state government as defined in ORS 174.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

(i) On an officially sanctioned trade promotion or fact-finding mission; or

(ii) In officially designated negotiations, or economic development activities, where receipt of the expenses is approved in advance.

## DEFINITIONS

**"Business"** means any corporation, partnership, proprietorship, firm, enterprise, franchise, association, organization, self-employed individual and any other legal entity operated for economic gain. This does not include income-producing not-for-profit corporations that are tax-exempt under section 501(c) of the Internal Revenue Code with which a public official or relative of a public official is associated in a non-compensated capacity. [ORS 244.020(2)]

**"Income"** means income of any nature derived from any source, including but not limited to any salary, wage, advance, payment, dividend, interest, rent, honorarium, return of capital, forgiveness of indebtedness, retirement income, real estate transactions, inheritance income, or anything of economic value received as income including income from government sources (i.e., social security, your public salary, etc.). [ORS 244.020(9)]

"**Honorarium"** means a payment or something of economic value given to a public official in exchange for services upon which custom or propriety prevents the setting of a price. Services include, but are not limited to, speeches or other services rendered in connection with an event. [ORS 244.020(8)]

**"Person"** means, for purposes of this form, (a) the public official required to file a Statement of Economic Interest and (b) an individual, corporation, partnership, joint venture, and any other similar organization or association.

**"Member of Household"** means any person who resides with the public official. [ORS 244.020(11)]

## FAQS

***Once logged in to the account, do the sessions time out?***
Yes. The session will time out after a 15-minute period of inactivity.

***Can filers file a paper Statement of Economic Interest (SEI)?***
No. Since 2016, all required filers must file electronically.

***Can anyone get a password to file electronically?***

No. Only those statutorily identified as required filers who have been assigned to a seat in the system can access the Electronic Filing System (EFS) for filing purposes.

***How long is the link in the email invitation valid?***

90 days. If the account is not created within 90 days, the link expires.

***What if an SEI filer attempts to create their account after the 90 days?***

The SEI filer would need to contact their JC to request a new email invitation. The JC will need to reassign the filer to generate a new email invitation and active link.

***When is the deadline for filing an annual SEI report?***

April 15th of each year. The Electronic Filing System (EFS) is available 24/7.

***When does the "window" for filing the SEI report open?***

Annually on March 15th. This gives SEI filers 30 days to complete their SEI filing on time.

***NOTE:*** *SEI filers, who have an account profile, will receive an email notification on March 15th letting them know the filing window is open and reminding them that they are required to file. Please make sure the email on your SEI filer account is valid so that you receive these important notifications.*

***Are Jurisdictional Contacts (JCs) responsible for assisting filers?***

Yes. JCs are responsible for assisting SEI filers in creating their profiles and setting up their accounts within EFS. JCs should reach out to the SEI filers in their jurisdiction to remind them of the filing deadline.

***NOTE****: SEI filers are responsible for filing their own SEI reports.*

***Are the disclosure questions different from year to year?***

Typically, no as the questions are statutorily mandated. However, in 2023 the legislature passed House Bill 2038, which changed the filing requirement to include information about clients of businesses.

***The system is not accepting my email address the way I entered it?***

Try entering your email address in all lowercase letters.

## SYSTEM REQUIREMENTS

To ensure the safety & security of your browsing experience, oregon.gov websites are compatible with most popular browsing software. For more information, please visit Supported Browsers on oregon.gov.

As with other provisions in Oregon Government Ethics law, it is each public official's personal responsibility to ensure they comply with the requirements to complete and electronically submit the SEI by April 15.

If you have any questions regarding the Annual Verified Statement of Economic Interest or the Oregon Government Ethics Commission, please call or email OGEC staff.

## Oregon Government Ethics Commission

3218 Pringle Rd SE, STE 220
Salem, OR 97302-1680
Phone: 503-378-5105
Website: www.oregon.gov/ogec
Email: mail@ogec.oregon.gov

6. **Old Business**

a. AI Policy Next Steps

# Tigard-Tualatin School District 23J

Code: IIBG
Adopted: 6/10/24

## Responsible use of Technology

The Board believes access to technology should be equitable for all students, differentiated to meet varied student needs, and utilized and promoted in a transformational manner that enhances academic achievement. The Board shall guide the responsible use of technology including, but not limited to, generative artificial intelligence and other technologies, and shall outline best practices for technology use. The Board encourages staff to responsibly integrate technology into instruction in a manner that promotes student engagement, future readiness, innovation, and expanded learning opportunities.

The Board authorizes the superintendent to develop and implement administrative regulations governing how and when technology use is allowed or disallowed. Such procedures will protect appropriate staff and student use of technology and encourage equitable opportunities for learning about and experiencing technology.

The superintendent implements this policy by developing and implementing procedures listed in IIBG-AR.

END OF POLICY

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# Tigard-Tualatin School District 23J

Code: IIBG-AR
Adopted: 8/26/24

## Responsible use of Technology

### Definitions

**Technology:** Any digital tool or mechanical system designed to enhance tasks, communication, or learning experiences.

**Universal Design for Learning (UDL)**: A framework for flexible learning environments where all students can access, engage with, and express their knowledge and skills in diverse and varied ways.

**Artificial Intelligence (AI):** A machine-based system that can, for a given set of human-defined objectives, make predictions, recommendations, or decisions influencing real or virtual environments.[1]

**Generative AI:** The class of AI models that emulate the structure and characteristics of input data to generate derived synthetic content.[2]

**Technology-Generated Material:** Texts, images, audio files, videos, and other material produced by artificial intelligence or other technologies.

**Deepfake:** Highly realistic and manipulated media created using advanced technology such as artificial intelligence and machine learning.

**Cheapfake:** Manipulated media created using simple editing tools, with or without technology.

### Purpose

The district enforces the administrative rules listed below so students and staff may be empowered to use technology in an innovative, informed, and equitable manner to support Board Policy ACB Every Student Belongs.

### Student Responsibilities

1. Student Technology Expectations:

    a. Use technology honestly, respectfully, and responsibly.
    b. Follow instructor guidance and classroom technology use agreements.
    c. Actively avoid using technology in a harmful or dishonest manner.
    d. Follow the guidance listed in the district Student Rights and Responsibilities Handbook.

[1] Exec. Order 14110.2023
[2] Exec. Order 14110.2023

**Shared Student, Staff, and Administrator Responsibilities**

1. Manage Data Responsibly

    a. Keep full names, passwords, addresses, personal information, identification numbers, video and images of staff and students private.
    b. Review and adjust privacy settings.
    c. Securely delete or destroy data when it is no longer needed.
    d. Report harmful and suspicious online activity such as unauthorized mimicry (deepfakes, etc), cyberbullying, and phishing (false emails, etc.).

2. Conscious When Creating Content

    a. Avoid creating or generating inaccurate, harmful, or inappropriate content in material.

3. Review Material for Accuracy, Bias, and Potential Harm

    a. Review material for bias, accuracy and potential harm before sharing it or using it in research.

4. Honor Agreements

    a. Comply with product-specific usage agreements for all technologies used on campus on district-provided devices off campus.

5. Avoid Mimicry:

    a. Avoid creating material mimicking the likeness, voice, or copyrightable material of students, staff and others, such as deepfakes and cheapfakes, unless it is created ethically and transparently.

        (1) Mimicry regarding minors is prohibited unless there is clear educational value and parent/guardian permission is obtained in writing in advance.
        (2) Prior consent and post-generation approval shall be gathered in writing and kept on file if creating any type of material that could be considered mimicry.
        (3) Harmful or inappropriate mimicry is always prohibited, regardless of consent, and will invoke discipline from a school administrator.

6. Practice Disclosure and Citation:

    a. Disclose, credit, and cite technology-generated material utilized in research papers, publications, essays, and other applicable instances following Board Policy IKI Academic Integrity.

**Shared Staff and Administrator Responsibilities**

1. Staff Technology Expectations

    a. Use technology equitably, inclusively, appropriately, and innovatively following district policies.

2. Classroom Technology Use Agreements:

    a. Create clear, empowering classroom-specific technology agreements, include then in the course syllabus and student guides, and communicate them to students.

3. Select, Deselect and Mitigate Technology-Related Material

    a. Select, and deselect, technology product content and technology-generated material following the criteria and processes listed in Administrative Rule IIA-AR Instructional Materials Selection and Procurement.
    b. Mitigate biased, inaccurate, or potentially harmful content if it appears in technology, or technology-generated material, utilized or referenced in the classroom as outlined in IIA-AR.

4. Planning for Student Technology Use

    a. Consult the district's approved Digital Resource Menu before encouraging or requiring students to use a specific technology.
    b. Submit a "NEW Digital Resource Request" to request approval for student access to unlisted technology at school and on district-provided devices.
    c. Submit a tech support ticket if it appears as though a website or other technology is blocked unnecessarily.

5. Instructional Practices

    a. Integrate technology into instruction to enhance learning and increase opportunities for students to engage with and practice technology use.
    b. Explicitly teach digital citizenship and media literacy skills at least twice per year, continuously reinforce digital citizenship concepts, and model best practices.
    c. Remind students to protect their personal and sensitive information regularly.
    d. Integrate differentiated instruction, collaboration, and productive discourse.
    e. Include Universal Design for Learning (UDL) scaffolds and supports to provide multilingual, multimodal, and accessible learning.
    f. Align lessons with district initiatives and International Society for Technology in Education (ISTE) standards.

6. Student Accommodations

    a. Honor student accommodations established by Student Services regarding using generative AI or other assistive technologies at all times.

**School Administrator Responsibilities**

1. Oversee Building Technology Use

    a. Direct, promote, and support learning opportunities and activities that integrate technology.
    b. Review and revise classroom technology agreements and guidance documents.
    c. Coordinate with the Director of Technology and other applicable Directors or their designees.

**District Responsibilities**

1. Oversight of the District Technology Program

    a. The Director of Technology will oversee, plan, and implement the initiatives listed in this document in coordination with other applicable Directors or their designees.
    b. The Director of Technology will review and approve technology use requests to ensure compliance with the Children's Internet Protection Act (CIPA), the Children's Online Privacy Rule (COPPA), and other applicable regulations following the Administrative Rule EHB-AR Cybersecurity.
    c. The Director of Technology will negotiate Data Privacy Agreements or require and direct the gathering of parent/guardian permission for students' use of technology.

2. Access to Technology

    a. Provide access to technology that enhances educational experiences and choice-ready, future-ready preparedness, including innovative tools such as generative AI.
    b. Encourage and facilitate opportunities for students and staff to actively use technology so they may practice digital media and technological fluency.
    c. Avoid unnecessarily blocking appropriate technology resources.

3. Community Engagement

    a. Seek stakeholder input, including students, staff, and community, on technology use through surveys, focus groups, etc.
    b. Host forums and workshops to share information about new technologies and policies.
    c. Gather feedback and foster collaboration between schools, families, and community partners.

4. Professional Development

    a. Provide at least two technology-related professional development sessions per year for staff to guide and promote responsible, ethical, collaborative, and innovative technology use.

5. Monitoring Student Use

    a. Implement appropriate measures to monitor student use of technology resources, including district-provided devices and networks, to ensure compliance with this policy and applicable laws.

        (1) Monitoring may include content filtering, network activity logging, and periodic review of student-created content in accordance with Administrative Rule EHB-AR Cybersecurity.

6. Policy Oversight

    a. Host an annual committee to review and adjust the Administrative Rule IIBG-AR Responsible Use of Technology to ensure that they remain relevant and up to date.

        (1) The committee shall include:

            (a) The Director of Technology or their designee,

(b) Other applicable Director(s), or their designee(s),
(c) Staff members who utilize technology regularly or are concerned about technology use,
(d) A member of the assistive technology team or their designee,
(e) Subject matter experts, community members, and students may also be invited to participate in the committee.

7. **First Reading *(Shaded words are new/strikethroughs are deleted)**

a. GBNAA/JHFF - Suspected Sexual Conduct with Students and Reporting Requirements

# OSBA Model Sample Policy

Code: GBNAA/JHFF
Adopted:

## Suspected Sexual Conduct with Students and Reporting Requirements *

{Required policy. ORS 339.372 establishes the requirement for boards to adopt policy on suspected sexual conduct.}

Sexual conduct by district employees, contractors[1], agents[2], and volunteers[3] is prohibited and will not be tolerated. All district employees, contractors, agents, ~~and~~ volunteers, and students[4] are subject to this policy. ~~Students are also subject to this policy if they are acting as an employee, contractor, agent or volunteer.~~

[5]"Sexual conduct," means verbal or physical conduct or verbal, written or electronic communications by a school employee, a contractor, an agent or a volunteer that involve a student and that are sexual advances or requests for sexual favors directed toward the student, or of a sexual nature that are directed toward the student or that have the effect of unreasonably interfering with a student's educational performance, or of creating an intimidating or hostile educational environment. "Sexual conduct" does not include touching or other physical contact that is necessitated by the nature of the school employee's job duties or by the services required to be provided by the contractor, agent or volunteer, and for which there is no sexual intent; verbal, written or electronic communications that are provided as part of an education program that meets state educational standards or a policy approved by the Board; or conduct or communications described in the definition of sexual conduct herein if the school employee, contractor, agent or volunteer is also a student and the conduct or communications arise out of a consensual relationship between students, do not create an intimidating or hostile educational environment and are not prohibited by law, any policies of the district or any applicable employment agreements.

"Student" means any person who is in any grade from prekindergarten through grade 12 or 21 years of age or younger and receiving educational or related services from the district that is not a post-secondary institution of education, or who was previously known as a student by the person engaging in sexual conduct and who left school or graduated from high school within ~~90 days~~one calendar year prior to the sexual conduct.

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[1] "Contractor" means a person providing services to the district under a contract in a manner that requires the person to have direct, unsupervised contact with students.

[2] "Agent" means a person acting as an agent for the district in a manner that requires the person to have direct, unsupervised contact with students.

[3] "Volunteer" means a person acting as a volunteer for the district in a manner that requires the person to have direct, unsupervised contact with students.

[4] Student conduct may only be sexual conduct if the student is also an employee, contractor, agent, or volunteer.

[5] This definition of "sexual conduct" affects all conduct that occurs before, on or after June 23, 2021, for purposes of reports that are made, investigations that are initiated, or a collective bargaining agreement, an employment contract, an agreement for resignation or termination, a severance agreement or any similar contract or agreement entered into, on or after June 23, 2021.

The district will post in each school building the names and contact information of the employees designated for the respective school buildings to receive reports of suspected sexual conduct and the procedures the designee will follow upon receipt of the report.

Any district employee ~~[{[6]}, contractor, agent or volunteer]~~ who has reasonable cause to believe that a student has been subjected to sexual conduct by another district employee, contractor, agent or volunteer, or that another district employee, contractor, agent or volunteer has engaged in sexual conduct with a student shall immediately report such suspected sexual conduct to the [school principal] or the [school vice principal], in the event the designated administrator is the suspected perpetrator, for their school building. If the conduct also constitutes child abuse, the employee must make mandatory reports in accordance with Board policy GBNAB/JHFE – Suspected Abuse of a Child Reporting Requirements.

If the superintendent is the alleged perpetrator the report shall be submitted to the [Linn Benton Lincoln ESD Superintendent] who shall report the suspected sexual conduct to the Board chair.

[If an employee fails to report suspected sexual conduct or fails to maintain confidentiality of records, the employee will be disciplined up to and including dismissal.]

When a designated licensed administrator receives a report of suspected sexual conduct by a district employee, contractor, agent or volunteer, the administrator will follow procedures established by the district and set forth in the district's administrative regulation GBNAA/JHFF-AR - Suspected Sexual Conduct Report Procedures and Form. All such reports will be reported to the Oregon Department of Education (ODE) or Teacher Standards and Practices Commission (TSPC) in accordance with such administrative regulation. The agency receiving a report will complete an investigation regardless of any changes in the relationship or duties of the person who is the alleged perpetrator.

When there is reasonable cause to support the report, a district employee suspected of sexual conduct shall be placed on paid administrative leave pending an investigation and the district will take necessary actions to ensure the student's safety.

When there is reasonable cause to support the report, a district contractor, agent or volunteer suspected of sexual conduct shall be removed from providing services to the district and the district will take necessary actions to ensure the student's safety.

The district will notify, as allowed by state and federal law, the person who was subjected to the suspected sexual conduct about any actions taken by the district as a result of the report.

A district employee, contractor or agent will not assist another district employee, contractor or agent in obtaining a new job if the individual knows, or has reasonable cause to believe the district employee, contractor or agent engaged in sexual conduct. Nothing in this policy prevents the district from disclosing information required by law or providing the routine transmission of administrative and personnel files pursuant to law.

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[6] {The following language in brackets, i.e., [, contractor, agent or volunteer], is optional language for the district to consider including. If the language is kept, the district must make these groups aware of the policy and its administrative regulation and their responsibilities under both. This may also be included in contracts with agents and contractors and include reference to this policy.}

The initiation of a report in good faith about suspected sexual conduct may not adversely affect any terms or conditions of employment or the work environment of the person who initiated the report or who may have been subject to sexual conduct. If a student initiates a report of suspected sexual conduct by a district employee, contractor, agent or volunteer in good faith, the student will not be disciplined by the district or any district employee, contractor, agent or volunteer.

The district will provide to employees at the time of hire, or to a contractor, agent or volunteer at the time of beginning service for the district, the following:

1. A description of conduct that may constitute sexual conduct;

2. A description of the investigatory process and possible consequences if a report of suspected sexual conduct is substantiated; and

3. A description of the prohibitions imposed on district employees, contractors and agents when they attempt to obtain a new job, pursuant to ORS 339.378(2).

All district employees are subject to Board policy GCAB - Personal Electronic Devices and Social Media - Staff regarding appropriate electronic communications with students.

Any electronic communications with students by a contractor, agent or volunteer for the district will be appropriate and only when directed by district administration. When communicating with students electronically regarding school-related matters, contractors, agents or volunteers shall use district e-mail using mailing lists and/or other internet messaging approved by the district to a group of students rather than individual students or as directed by district administration. Texting or electronically communicating with a student through contact information gained as a contractor, agent or volunteer for the district is [[strongly] [discouraged] [prohibited]].

The superintendent shall develop administrative regulations to implement this policy and to comply with state law.

END OF POLICY

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**Legal Reference(s):**

ORS 332.107 ORS 339.370 - 339.400 ORS 419B.005 - 419B.045

Every Student Succeeds Act, 20 U.S.C. § 7926 (2018).
~~House Bill 2136 (2021).~~
~~Senate Bill 51 (2021).~~
House Bill 4160 (2024).

b. GCAA - Standards for Competent and Ethical Performance of Oregon Educators

# OSBA Model Sample Policy

Code: GCAA
Adopted:

## Standards for Competent and Ethical Performance of Oregon Educators

**[Application of Rules**

1. Oregon Administrative Rules were adopted by the Teacher Standards and Practices Commission (TSPC) in accordance with Oregon Revised Statutes (ORS).

2. Oregon Administrative Rules (OAR) may be used as criteria by the TSPC in matters pertaining to the revocation or suspension of licenses issued by TSPC under Oregon law or the discipline of any license holder or any person who has held a license at any time within five years prior to issuance of the notice of charges under ORS.

3. The TSPC determines whether an educator's performance is ethical or competent in light of all the facts and circumstances surrounding the educator's performance as a whole.

4. The TSPC will promptly investigate complaints:

    a. The TSPC may at its discretion defer action to charge an educator against whom a complaint has been filed under law when the investigation report indicates that disciplinary action against the educator is pending at the local district level or when criminal charges are pending or are likely to be filed against the educator. In considering whether to defer action to charge an educator, the TSPC shall consider all relevant circumstances including the nature and seriousness of the allegations and whether the educator is currently employed as a teacher or school administrator;
    b. The executive secretary shall regularly inform the TSPC of the status of any complaints on which the TSPC has deferred action.]

**Definitions**

The following definitions apply to Oregon Administrative Rules unless otherwise indicated by context:

1. "Administrator": any educator who holds a valid Oregon administrative license or registration and who works in a position requiring an administrative license;

2. "Competent": discharging required duties as set forth in these rules;

3. "Educator": any licensed or registered or certified person who is authorized to be engaged in the instructional program including teaching, counseling, school psychology, administering and supervising;

4. "Ethical": conforming to the professional standards of conduct set forth in these rules;

5. "Sexual conduct": means verbal or physical conduct or verbal, written or electronic communications by a school employee, a contractor, an agent or a volunteer that involve a student that are:

a. Sexual advances or requests for sexual favors directed toward the student; or
b. Of a sexual nature that are directed toward the student or that have the effect of unreasonably interfering with the student's educational performance, or of creating an intimidating or hostile educational environment.

"Sexual conduct" does not include:

a. Touching or other physical contact:

(1) That is necessitated by the nature of the district employee's job duties or by the services required to be provided by the contractor, agent, or volunteer; and
(2) For which there is no sexual intent.

b. Verbal, written or electronic communications that are provided as part of an education program that meets the state educational standards or a policy approved by the Board
c. Conduct or communications described in above if the district employee, contractor, agent or volunteer is also a student and the conduct or communications:

(1) Arise out of a consensual relationship between students;
(2) Do not create an intimidating or hostile educational environment; and
(3) Are not prohibited by law, any policies of the district or any applicable employment agreements.

6. "Sexual harassment": any unwelcome conduct with an individual which includes but is not limited to sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature when:

a. Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment;
b. Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or
c. Such conduct unreasonably interferes with an individual's work performance or creates an intimidating, hostile or offensive working environment.

7. "Teacher": any person who holds a teacher's license as provided in ORS 342.125.

8. "Student": means any person who is:

a. In any grade from kindergarten through grade 12; or
b. Twenty-one years of age or younger and receiving educational or related services from an education provider that is not a post-secondary institution of education; or
c. Who was previously known as a student by the person engaging in sexual conduct and who left school or graduated from high school within ~~90 days~~ one calendar year prior to the sexual conduct.

**The Competent Educator**

The teacher or administrator demonstrates a commitment to:

1. Recognize the worth and dignity of all persons and respect for each individual;

2. Encourage scholarship;

3. Promote democratic and inclusive citizenship;

4. Raise educational standards;

5. Use professional judgment; and

6. Promote equitable learning opportunities.

**Curriculum and Instruction**

The competent educator measures success by the progress of each student toward realization of personal potential as a worthy and effective citizen. The competent educator stimulates the spirit of inquiry, the acquisition of knowledge and understanding and the thoughtful formulation of goals as they are appropriate for each individual.

The competent teacher demonstrates:

1. Use of state- and district-adopted curriculum and goals;

2. Skill in setting instructional goals and objectives expressed as learning outcomes;

3. Use of current subject matter appropriate to the individual needs of students;

4. Use of students' growth and development patterns to adjust instruction to individual needs consistent with number of students and amount of time available; and

5. Skill in the selection and use of teaching techniques conducive to student learning.

The competent administrator demonstrates:

1. Skill in assisting individual staff members to become more competent educator by complying with federal, state and local law, rules and lawful and reasonable district policy and contracts;

2. Knowledge of curriculum and instruction appropriate to assignment;

3. Skill in implementing instructional programs through adequate communication with staff; and

4. Skill in identifying and initiating any needed change which helps each student toward realization of personal learning potential.

**Supervision and Evaluation**

The competent educator is a student of human behavior and uses this knowledge to provide a climate that is conducive to learning and that respects the rights of all persons without discrimination. The competent educator assumes responsibility for the activities planned and conducted through the district's program and assists colleagues to do the same. The competent educator gathers relevant information and uses it in the planning and evaluation of instructional activities.

The competent teacher demonstrates:

1. Multiple ways to assess the academic progress of individual students;

2. Skill in the application of assessment data to assist individual student growth;

3. Procedures for evaluating curriculum and instructional goals and practices;

4. Skill in the supervision of students; and

5. Skill in differentiating instruction.

The competent administrator demonstrates:

1. Skill in the use of assessment data to provide effective instructional programs;

2. Skill in the implementation of the district's student evaluation program;

3. Skill in providing equal opportunity for all students and staff; and

4. Skill in the use of employee and leadership techniques appropriate to the assignment and according to well-established standards which ensure due process for the staff for which the administrator is responsible for evaluating.

**Management Skills**

The competent educator is a person who understands students and is able to relate to them in constructive and culturally competent ways. The competent educator establishes and maintains good rapport. The competent educator maintains and uses records as required and as needed to assist the growth of students.

The competent teacher demonstrates skills in:

1. Establishing and maintaining classroom management that is conducive to learning;

2. Using and maintaining district property, equipment and materials appropriately;

3. Using and maintaining student records as required by federal and state law and district policies and procedures;

4. Using district and school business and financial procedures; and

5. Using district lawful and reasonable rules and regulations.

The competent administrator demonstrates:

1. Leadership skills in managing the school, its students, staff and programs as required by lawful and reasonable district policies, rules and regulations, state and federal laws and regulations and other programs as assigned and assures that staff is informed of these requirements; and

2. Skills in planning and staff assignment.

**Human Relations and Communications**

The competent educator works effectively with others — students, staff, parents and patrons. The competent educator is aware of the ways the community identifies with the school, as well as community needs and ways the school program is designed to meet these needs. The competent educator can communicate with knowledge, clarity and judgment about educational matters, the school and the needs of students.

The competent teacher demonstrates:

1. Willingness to be flexible in cooperatively working with others; and

2. Skill in communicating with students, staff, parents and other patrons.

The competent administrator demonstrates:

1. Skill in helping students, staff, parents and other patrons to learn about the school, the district and its program;

2. Skill in communicating district and school goals to staff and the public;

3. Willingness to be flexible in cooperatively working with others; and

4. Skill in reconciling conflict.

**The Ethical Educator**

The ethical educator is a person who accepts the requirements of membership in the teaching profession and acts at all times in ethical ways. In so doing the ethical educator considers the needs of the students, the district and the profession.

The ethical educator, in fulfilling obligations to the student, will:

1. Keep the confidence entrusted in the profession as it relates to confidential information concerning a student and the student's family;

2. Refrain from exploiting professional relationships with any student for personal gain or in support of persons or issues; and

3. Maintain an appropriate professional student-educator relationship by:

    a. Not demonstrating or expressing professionally inappropriate interest in a student's personal life;
    b. Not accepting or giving or exchanging romantic or overly personal gifts or notes with a student;
    c. Reporting to the educator's supervisor if the educator has reason to believe a student is or may be becoming romantically attached to the educator; and
    d. Honoring appropriate adult boundaries with students in conduct and conversations at all times.

The ethical educator, in fulfilling obligations to the district, will:

1. Apply for, accept, offer or assign a position of responsibility only on the basis of professional qualifications and will adhere to the conditions of a contract or the terms of the appointment;

2. Conduct professional business, including grievances, through established lawful and reasonable procedures;

3. Strive for continued improvement and professional growth;

4. Accept no gratuities or gifts of significance that could influence judgment in the exercise of professional duties; and

5. Not use the district's or school's name, property or resources for noneducational benefit without approval of the educator's supervisor or the appointing authority.

The ethical educator, in fulfilling obligations to the profession, will:

1. Maintain the dignity of the profession by respecting and obeying the law, exemplifying personal integrity and honesty;

2. Extend equal treatment to all members of the profession in the exercise of their professional rights and responsibilities;

3. Respond to requests for evaluation of colleagues and to keep such information confidential as appropriate; and

4. Respond to requests from a TSPC representative for information, furnish documents to TSPC, and participate in interviews with a TSPC representative relating to a TSPC investigation, except subject to the exercise of any legal right or privilege.

END OF POLICY

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**Legal Reference(s):**

OAR 584-020-0000 - 0035

House Bill 4160 (2024).

c. JHFF/GBNAA - Suspected Sexual Conduct with Students and Reporting Requirements

# OSBA Model Sample Policy

Code: JHFF/GBNAA
Adopted:

## Suspected Sexual Conduct with Students and Reporting Requirements *

{Required policy. ORS 339.372 establishes the requirement for boards to adopt policy on suspected sexual conduct.}

Sexual conduct by district employees, contractors[1], agents[2], and volunteers[3] is prohibited and will not be tolerated. All district employees, contractors, agents, ~~and~~ volunteers, and students[4] are subject to this policy. ~~Students are also subject to this policy if they are acting as an employee, contractor, agent or volunteer.~~

[5]"Sexual conduct," means verbal or physical conduct or verbal, written or electronic communications by a school employee, a contractor, an agent or a volunteer that involve a student and that are sexual advances or requests for sexual favors directed toward the student, or of a sexual nature that are directed toward the student or that have the effect of unreasonably interfering with a student's educational performance, or of creating an intimidating or hostile educational environment. "Sexual conduct" does not include touching or other physical contact that is necessitated by the nature of the school employee's job duties or by the services required to be provided by the contractor, agent or volunteer, and for which there is no sexual intent; verbal, written or electronic communications that are provided as part of an education program that meets state educational standards or a policy approved by the Board; or conduct or communications described in the definition of sexual conduct herein if the school employee, contractor, agent or volunteer is also a student and the conduct or communications arise out of a consensual relationship between students, do not create an intimidating or hostile educational environment and are not prohibited by law, any policies of the district or any applicable employment agreements.

"Student" means any person who is in any grade from prekindergarten through grade 12 or 21 years of age or younger and receiving educational or related services from the district that is not a post-secondary institution of education, or who was previously known as a student by the person engaging in sexual conduct and who left school or graduated from high school within ~~90 days~~one calendar year prior to the sexual conduct.

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[1] "Contractor" means a person providing services to the district under a contract in a manner that requires the person to have direct, unsupervised contact with students.

[2] "Agent" means a person acting as an agent for the district in a manner that requires the person to have direct, unsupervised contact with students.

[3] "Volunteer" means a person acting as a volunteer for the district in a manner that requires the person to have direct, unsupervised contact with students.

[4] Student conduct may only be sexual conduct if the student is also an employee, contractor, agent, or volunteer.

[5] This definition of "sexual conduct" affects all conduct that occurs before, on or after June 23, 2021, for purposes of reports that are made, investigations that are initiated, or a collective bargaining agreement, an employment contract, an agreement for resignation or termination, a severance agreement or any similar contract or agreement entered into, on or after June 23, 2021.

The district will post in each school building the names and contact information of the employees designated for the respective school buildings to receive reports of suspected sexual conduct and the procedures the designee will follow upon receipt of the report.

Any district employee ~~[{[6]}, contractor, agent or volunteer]~~ who has reasonable cause to believe that a student has been subjected to sexual conduct by another district employee, contractor, agent or volunteer, or that another district employee, contractor, agent or volunteer has engaged in sexual conduct with a student shall immediately report such suspected sexual conduct to the [school principal] or the [school vice principal], in the event the designated administrator is the suspected perpetrator, for their school building. If the conduct also constitutes child abuse, the employee must make mandatory reports in accordance with Board policy JHFE/GBNAB – Suspected Abuse of a Child Reporting Requirements.

If the superintendent is the alleged perpetrator the report shall be submitted to the [Linn Benton Lincoln ESD Superintendent] who shall report the suspected sexual conduct to the Board chair.

[If an employee fails to report suspected sexual conduct or fails to maintain confidentiality of records, the employee will be disciplined up to and including dismissal.]

When a designated licensed administrator receives a report of suspected sexual conduct by a district employee, contractor, agent or volunteer, the administrator will follow procedures established by the district and set forth in the district's administrative regulation JHFF/GBNAA-AR - Suspected Sexual Conduct Report Procedures and Form. All such reports will be reported to the Oregon Department of Education (ODE) or Teacher Standards and Practices Commission (TSPC) in accordance with such administrative regulation. The agency receiving a report will complete an investigation regardless of any changes in the relationship or duties of the person who is the alleged perpetrator.

When there is reasonable cause to support the report, a district employee suspected of sexual conduct shall be placed on paid administrative leave pending an investigation and the district will take necessary actions to ensure the student's safety.

When there is reasonable cause to support the report, a district contractor, agent or volunteer suspected of sexual conduct shall be removed from providing services to the district and the district will take necessary actions to ensure the student's safety.

The district will notify, as allowed by state and federal law, the person who was subjected to the suspected sexual conduct about any actions taken by the district as a result of the report.

A district employee, contractor or agent will not assist another district employee, contractor or agent in obtaining a new job if the individual knows, or has reasonable cause to believe the district employee, contractor or agent engaged in sexual conduct. Nothing in this policy prevents the district from disclosing information required by law or providing the routine transmission of administrative and personnel files pursuant to law.

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[6] {The following language in brackets, i.e., [, contractor, agent or volunteer], is optional language for the district to consider including. If the language is kept, the district must make these groups aware of the policy and its administrative regulation and their responsibilities under both. This may also be included in contracts with agents and contractors and include reference to this policy.}

The initiation of a report in good faith about suspected sexual conduct may not adversely affect any terms or conditions of employment or the work environment of the person who initiated the report or who may have been subject to sexual conduct. If a student initiates a report of suspected sexual conduct by a district employee, contractor, agent or volunteer in good faith, the student will not be disciplined by the district or any district employee, contractor, agent or volunteer.

The district will provide to employees at the time of hire, or to a contractor, agent or volunteer at the time of beginning service for the district, the following:

1. A description of conduct that may constitute sexual conduct;

2. A description of the investigatory process and possible consequences if a report of suspected sexual conduct is substantiated; and

3. A description of the prohibitions imposed on district employees, contractors and agents when they attempt to obtain a new job, pursuant to ORS 339.378(2).

All district employees are subject to Board policy GCAB - Personal Electronic Devices and Social Media - Staff regarding appropriate electronic communications with students.

Any electronic communications with students by a contractor, agent or volunteer for the district will be appropriate and only when directed by district administration. When communicating with students electronically regarding school-related matters, contractors, agents or volunteers shall use district e-mail using mailing lists and/or other internet messaging approved by the district to a group of students rather than individual students or as directed by district administration. Texting or electronically communicating with a student through contact information gained as a contractor, agent or volunteer for the district is [[strongly] [discouraged] [prohibited]].

The superintendent shall develop administrative regulations to implement this policy and to comply with state law.

END OF POLICY

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**Legal Reference(s):**

ORS 332.107 ORS 339.370 - 339.400 ORS 419B.005 - 419B.045

Every Student Succeeds Act, 20 U.S.C. § 7926 (2018).
~~House Bill 2136 (2021).~~
~~Senate Bill 51 (2021).~~
House Bill 4160 (2024).

8. **Second Reading**
9. **Board Comments**
10. **Future Agenda Items**
11. **Key Dates**

**Scholastic Book Fair - March 12-20**
**Literacy on the Farm - March 18, 5:00-7:30 pm**
**Executive Session - March 17, 7:00 pm**
**Grading Day - March 21**
**Spring Break - March 24-28**
**Strategic Planning Meeting, April 1, 4:15**
**Parent-Teacher Conferences - April 2-3**
**Early Release April 3, 12:35 pm dismissal**
**Regular School Board meeting - April 8**
**Red Cross Blood Drive - April 9**