

# Lowell School District

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45 S. Moss St. ♦ Lowell, Oregon 97452 ♦ (541) 937-2105

## **Board of Director's Meeting**

June 20, 2016

Professional Development Center

6:00 pm - Executive Session

6:45 pm – Budget Hearing followed by Supplemental Budget Hearing

7:00 pm - Public Session

### **AGENDA**

The Lowell School Board encourages public input. Persons wishing to address the Board on school related issues, are invited to do so, either when the item is presented on the agenda, or under the "Public Comments" section. In the interest of time and order, presentations from the public are limited to three (3) minutes per person, and the total time for individual agenda items shall not exceed twenty (20) minutes. An individual speaker's allotted time may not be increased by a donation of time from members of the public in attendance. If you wish to speak under Public Comments, please complete a Public Comment Form and turn it in to the Assistant to the Superintendent. The Board requests complaints or charges against an employee be held in Executive Session. Individuals who require disability-related accommodations or modifications to participate in the Board meeting should contact the Superintendent in writing prior to the meeting.

#### **1.0 OPENING BUSINESS—Professional Development Center—6:00 pm**

- 1.1 Call to Order
- 1.2 Public Comment on Executive Session Topics
- 1.3 Convene to Executive Session

#### **2.0 EXECUTIVE SESSION—Superintendent's Office Conference Room**

- 2.1 Pursuant to ORS 192.660(2)(i)
  - To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing.
  - 2.1.1 Discussion of Superintendent's Annual Objectives and Evaluation Process
- 2.2 Pursuant to ORS 192.660 (2) (d).
  - To conduct deliberations with persons designated by the governing body to carry on labor negotiations.
- 2.3 Pursuant to ORS 192.660 (2)(f)
  - To consider records exempt by law from public inspection.
- 2.4 Return to Public Session/Public Hearing

#### **3.0 BUDGET HEARING (PUBLIC HEARING)—Professional Development Center—6:45 pm**

- 3.1 2016-2017 Lowell School District Budget and Tax Levy (Attachment)
- 3.2 Public input and discussion
- 3.3 Close budget and tax levy hearing
  - 3.3.1 **Open Public Hearing 2015-2016 Supplemental Budget**
    - 3.3.1.1 2015-16 Supplemental Budget (Attachment)
    - 3.3.1.2 Public input and discussion
    - 3.3.1.3 Close budget hearing

**4.0 OPENING OF PUBLIC SESSION—Professional Development Center—7:00 pm**

4.1 Public Session Call to Order

4.2 Pledge of Allegiance

4.3 Attendance:

\_\_\_ Dennis McCallum, Chair

\_\_\_ Suzanne Kintzley, Vice-Chair

\_\_\_ Mike Galvin

\_\_\_ Joyce Donnell

\_\_\_ Jim Chapman

\_\_\_ Walt Hanline, Ed. D., Superintendent

\_\_\_ Kay Graham, Principal

\_\_\_ Marisa Owsley, Student Body Representative

\_\_\_ Michelle Stephens, Assistant to the Superintendent

4.4 Approval of Agenda – June 20, 2016

Recommended Action: Approval of Agenda

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

**5.0 COMMUNITY/SCHOOL PRESENTATIONS**

*\*\*Those that have received commendations or made presentations will have an opportunity to be excused at this time.*

**6.0 PUBLIC COMMENT**

*\*\*Opportunity for Citizens to address items not on the Agenda. Persons wishing to address the Board on any school related issue not listed elsewhere on the agenda are invited to do so now. Board Members are limited, but not required, to give a brief response to public statements or questions regarding non-agenda items.*

**7.0 CONSENT AGENDA—consolidated motion**

*\*\*The purpose of the Consent Agenda is to expedite action on routine agenda items. These items will be acted upon with one motion, second and approval of the Board, unless a member of the board or public wishes to pull the item for individual discussion and action. All matters listed under Consent Agenda are those on which the board has previously deliberated or can be classified as routine items of business. **There will be no separate discussion of these items prior to the vote by the Board unless members of the Board, staff, or public request specific items to be discussed or pulled from the Consent Agenda.** Members of the public who wish to speak on an item must first fill out a public comment card.*

7.1 Board Minutes from Date Board Meeting (Attachment)

7.2 Check Register: 28543-28653 (Attachment)

7.3 2<sup>nd</sup> reading and adoption of policies BFFA, BBFB, EFAA-AR, GBC, GCDA/GDDA, IGAEB, IGBAF-AR, IKF, IKF-AR, IL, ILBA, INDB, JEA, JEBA, JEBA-AR, JEC, KL, KL-AR, LBE-AR (Attachment)

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

**8.0 ACTION DISCUSSION**

8.1 Recommendation: Approve Resolution 2015-16-5 to Adopt the 2015-16 Supplemental Budget—  
Referred by Mr. Standridge; Presented by Dr. Hanline (Refer to Attachment 3.3.1.1)

Explanatory Statement: All fiscal decisions must be approved by the Lowell School Board

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

8.2 Recommendation: Approve Resolution 2015-16-6 to Adopt the 2016-17 Budget and Certify the Tax Levy—Referred by Mr. Standridge; Presented by Dr. Hanline (Refer to Attachment 3.1)

Explanatory Statement: All fiscal decisions must be approved by the Lowell School Board

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

8.3 Recommendation: 1<sup>st</sup> and 2<sup>nd</sup> reading and approval of Sick Time Policy GCBDD/GDBDD—Presented by Dr. Hanline (Attachment)

Explanatory Statement: Board approval is required for all policy adoption

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

8.4 Recommendation: Approve the submission of the application and all necessary documents for Senate Bill 447 Oregon School Capital Improvement Matching Program (OSCIM)—Presented by Mr. Matthews

Explanatory Statement: Board approval of submission is recommended for acceptance of the application

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

8.5 Recommendation: Approve the elimination of SPED bus position—Presented by Mr. Matthews

Explanatory Statement: Board approval requested prior to eliminating a position within the district

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

8.6 Recommendation: Approve the increase in MVA classroom cap from 15 to 16—Presented by Dr. Hanline

Explanatory Statement: With an even number of students in the classroom, teachers will be better able to divide students into groups and pairs for lessons and projects.

MOTION: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ AYES: \_\_\_\_\_ NOES: \_\_\_\_\_ ABSTAIN: \_\_\_\_\_

## **9.0 INFORMATION AND STUDY**

9.1 Facility Update/Report—Presented by Mr. Matthews

9.2 Utility Report—Referred by Ms. Weathers (Attachment)

9.3 Bridge Charter Academy Report—Presented by Mr. Matthews (Attachment)

9.4 Mountain View Academy Report—Referred by Ms. Weathers (Attachment)

9.5 Financial Report—Referred by Mr. Standridge (Attachment)

9.6 Activities Fund Report—Referred by Ms. Weathers (Attachment)

9.7 Student Body Representative Report—Presented by Ms. Owsley

9.7.1 Introduction of New Student Body Representative

9.7.2 Recognition of Ms. Owsley's Service to the Board

9.8 Principals Report—Presented by Ms. Graham

9.9 Superintendent's Report—Presented by Dr. Hanline

## 9.10 Board Members' Report

### 10.0 **ADJOURNMENT**

Any documents that are public records and are provided attachments to public session items on this agenda are accessible to the public on the District's Website, with the exception of documents provided at the time of the meeting. Documents that are public records, and are provided at the time of the meeting to a majority of the Board regarding a public session item, will be made available for public inspection upon request to the Superintendent's Assistant.

**LOWELL SCHOOL DISTRICT NO. 71  
Resolution No. 2015-16-6**

**Resolution Adopting the Budget**

BE IT RESOLVED, that the Board of Directors of the Lowell School District hereby adopts the budget for 2016-17 in a total sum of \$8,444,409 now on file in the district administration office.

**Resolution Making Appropriations**

BE IT RESOLVED, that for the fiscal year beginning July 1, 2016, the amounts shown below are hereby appropriated for the purposes indicated within the funds listed.

Appropriation Category	Fund Name				All Funds Total
	General Fund	Special Revenue Fund	Debt Service Fund	Capital Projects Fund	
1000 - Instruction	4,012,880	344,005	0	0	
2000 - Support Services	1,916,469	331,647	0	242,572	
3000 - Community/Enterprise	0	411,505	0	0	
5100 - Debt Service	0	56,090	309,645	0	
5200 - Interfund Transfers	550,572	32,645	0	0	
6000 - Contingency	236,379	0	0	0	
<b>Appropriation Total</b>	<b>6,716,300</b>	<b>1,175,892</b>	<b>309,645</b>	<b>242,572</b>	<b>8,444,409</b>
7000 - Unappropriated	0	0	0	0	0
<b>Budget Total</b>	<b>6,716,300</b>	<b>1,175,892</b>	<b>309,645</b>	<b>242,572</b>	<b>8,444,409</b>

**Resolution Imposing and Categorizing the Tax**

BE IT RESOLVED, that the following ad valorem property taxes are hereby imposed and categorized for tax year 2016-17 upon the assessed value of all taxable property within the district:

**Permanent tax rate subject to the Education Limitation: \$5.0409 per \$1,000 of assessed value.**

**Adopted by the Board of Directors of Lowell School District No. 71, Lane County Oregon this 20th day of June 2016.**

\_\_\_\_\_  
Board Chair

\_\_\_\_\_  
Superintendent/Secretary to the Board

**Lowell School District No. 71**

**Resolution No. 2015-16-5**

**RESOLUTION ADOPTING SUPPLEMENTAL BUDGET AND MAKING APPROPRIATION**

BE IT RESOLVED that the Board of Directors for Lowell School District #71 hereby adopts the following supplemental budget for the fiscal year 2015-16 which increases the total budget by \$1,352,000 to the sum of \$7,193,881 now on file at the Office of the Superintendent.

BE IT RESOLVED that the amounts for fiscal year 2015-16 and for the purposes shown below are hereby appropriated and increase the total appropriation of all funds by \$1,352,000 to the sum of \$7,193,881.

**SUMMARY OF SUPPLEMENTAL BUDGET**

**Fund: General Fund**

Resource	Amount	Requirement	Amount
Property Tax	\$ 20,000	2000 Support Services	\$ 200,000
Miscellaneous Revenue	\$ 94,000	5200 Interfund Transfers	\$ 156,000
State Grants	\$ 54,000	6000 Contingency	\$ (188,000)
<b>Revised Total Resources</b>	<b>\$ 4,583,000</b>	<b>Revised Total Requirements</b>	<b>\$ 4,583,000</b>

*Comments:*

Increase appropriation for additional expenses in transportation and facilities/grounds maintenance. Increase transfers to support additional facility improvement costs in the Capital Projects Fund.

**Fund: Special Revenue Fund**

Resource	Amount	Requirement	Amount
Federal Revenue	\$ 37,000	3000 Community/Enterprise	\$ 37,000
<b>Revised Total Resources</b>	<b>\$ 1,142,301</b>	<b>Revised Total Requirements</b>	<b>\$ 1,142,301</b>

*Comments:*

Increase appropriation for additional food and consultant costs. Additional federal reimbursement funds received due to increased activity.

**Fund: Capital Projects Fund**

Resource	Amount	Requirement	Amount
Proceeds from Debt	\$ 639,000	2000 Support Services	\$ 342,000
Miscellaneous Revenue	\$ 10,000	3000 Community/Enterprise	\$ 130,000
Transfer From General Fund	\$ 156,000	4000 Facilities	\$ 675,000
Beginning Fund Balance	\$ 342,000		
<b>Revised Total Resources</b>	<b>\$ 1,187,000</b>	<b>Revised Total Requirements</b>	<b>\$ 1,187,000</b>

*Comments:*

Appropriate the funds received from the issuance of debt for the acquisition of property and a modular building. Appropriate funds for projects that were not completed in the previous fiscal year that include; improvement of school buildings, improvement of food service facilities/equipment, technology upgrades and the acquisition of a modular building. Appropriate funds from General Fund Transfer for projects that include; architect fees, announcer's booth, fencing and track renovation.

# Lowell School District

45 S. Moss St. ♦ Lowell, Oregon 97452 ♦ (541) 937-2105

## **Board of Director's Meeting**

May 23, 2016

Professional Development Center

6:00 pm – Community Forum and State of the District Address

Executive Session to immediately follow

7:00 pm - Public Session

### **Minutes**

The Lowell School Board encourages public input. Persons wishing to address the Board on school related issues, are invited to do so, either when the item is presented on the agenda, or under the "Public Comments" section. In the interest of time and order, presentations from the public are limited to three (3) minutes per person, and the total time for individual agenda items shall not exceed twenty (20) minutes. An individual speaker's allotted time may not be increased by a donation of time from members of the public in attendance. If you wish to speak under Public Comments, please complete a Public Comment Form and turn it in to the Assistant to the Superintendent. The Board requests complaints or charges against an employee be held in Executive Session. Individuals who require disability-related accommodations or modifications to participate in the Board meeting should contact the Superintendent in writing prior to the meeting.

#### **1.0 COMMUNITY FORUM AND STATE OF THE DISTRICT ADDRESS—Professional Development Center—**

##### **6:00 pm**

1.1 Presented by Superintendent Walt Hanline Ed.D.

#### **2.0 OPENING BUSINESS—Professional Development Center**

2.1 Call to Order

2.2 Public Comment on Executive Session Topics

2.3 Convene to Executive Session

#### **3.0 EXECUTIVE SESSION—Superintendent's Office Conference Room**

3.1 Pursuant to ORS 192.660(2)(i)

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

3.1.1 Discussion of Superintendent's Annual Objectives and Evaluation Process

3.2 Pursuant to ORS 192.660 (2) (d).

To conduct deliberations with persons designated by the governing body to carry on labor negotiations.

3.3 Pursuant to ORS 192.660 (2)(f)

To consider records exempt by law from public inspection.

- The Lowell School Board considered the items reflected on the Executive Session Agenda and no action was taken.

3.4 Return to Public Session

#### **4.0 OPENING OF PUBLIC SESSION—Professional Development Center—7:00 pm**

#### 4.1 Public Session Call to Order

#### 4.2 Pledge of Allegiance

#### 4.3 Attendance:

- \_\_\_ Dennis McCallum, Chair
- \_\_\_ Suzanne Kintzley, Vice-Chair
- \_\_\_ Mike Galvin
- \_\_\_ Joyce Donnell
- \_\_\_ Jim Chapman
- \_\_\_ Walt Hanline, Ed. D., Superintendent
- \_\_\_ Kay Graham, Principal
- \_\_\_ Marisa Owsley, Student Body Representative
- \_\_\_ Michelle Stephens, Assistant to the Superintendent

#### 4.4 Approval of Agenda – May 23, 2016

Recommended Action: Approval of Agenda

MOTION: Suzanne Kintzley 2<sup>nd</sup>: Mike Galvin AYES: 5 NOES: 0 ABSTAIN: 0

### 5.0 **COMMUNITY/SCHOOL PRESENTATIONS**

#### 5.1 MVA Annual Report—Presented by Laurie Cardwell

- Handout—Mountain View Academy Annual Report

*\*\*Those that have received commendations or made presentations will have an opportunity to be excused at this time.*

### 6.0 **PUBLIC COMMENT**

*\*\*Opportunity for Citizens to address items not on the Agenda. Persons wishing to address the Board on any school related issue not listed elsewhere on the agenda are invited to do so now. Board Members are limited, but not required, to give a brief response to public statements or questions regarding non-agenda items.*

### 7.0 **CONSENT AGENDA—consolidated motion**

*\*\*The purpose of the Consent Agenda is to expedite action on routine agenda items. These items will be acted upon with one motion, second and approval of the Board, unless a member of the board or public wishes to pull the item for individual discussion and action. All matters listed under Consent Agenda are those on which the board has previously deliberated or can be classified as routine items of business. **There will be no separate discussion of these items prior to the vote by the Board unless members of the Board, staff, or public request specific items to be discussed or pulled from the Consent Agenda.** Members of the public who wish to speak on an item must first fill out a public comment card.*

#### 7.1 Board Minutes from the April 25, 2016, Board Meeting (Attachment)

#### 7.2 Ratification of Employment (Attachment)--Amended

#### 7.3 Check Register: 28437-28539 (Attachment)

MOTION: Jim Chapman 2<sup>nd</sup>: Mike Galvin AYES: 5 NOES: 0 ABSTAIN: 0

### 8.0 **ACTION DISCUSSION**

#### 8.1 Motion: Approve the adoption and purchase of the Ready Math Curriculum for Lundy Elementary—Presented by Ms. Graham (Attachment)

Explanatory Statement: All adoptions and purchases need to first be approved by the Lowell School Board

MOTION: Suzanne Kintzley 2<sup>nd</sup>: Joyce Donnell AYES: 5 NOES: 0 ABSTAIN: 0

8.2 Motion: Approve the conferring of an Honorary Diploma to Sidney Wayne Dull provided he meets the criteria outlined in ORS 332.114 —Presented by Dr. Hanline (Handouts)

Explanatory Statement: School Board approval is necessary to confer an honorary diploma

MOTION: Jim Chapman 2<sup>nd</sup>: Suzanne Kintzley AYES: 5 NOES: 0 ABSTAIN: 0

8.3 Recommendation: Approve the request to the City of Lowell to make Moss St. into a one way street—Presented by Dr. Hanline

Explanatory Statement: Board approval is required for the administration to request a change from the city on behalf of the school district

- Reminder to talk to the Fire Chief regarding getting the fire trucks down the street
- Angled parking may have drivers backing out when kids are around
- This may not be the ideal time to address this issue
- Mr. Matthews is checking to see if the issue can be addressed with changing how the busses are parked

This item is being tabled at this time.

## **9.0 INFORMATION AND STUDY**

9.1 1<sup>st</sup> reading of policies: BFFA, BBFB, EFAA-AR, GBC, GCDA/GDDA, IGAEB, IGBAF-AR, IKF, IKF-AR, IL, ILBA, INDB, JEA, JEBA, JEBA-AR, JEC, KL, KL-AR, LBE-AR—Presented by Dr. Hanline (Attachment)

9.2 Overview of Administrative Duties at Lowell School District for 2016-17—Presented by Dr. Hanline (Attachment)

9.3 Facility Update/Report—Presented by Mr. Matthews

- The buildings on the new property are being prepped for painting and weeds eradicated

9.4 Utility Report—Referred by Ms. Weathers (Attachment)

9.5 Bridge Charter Academy Report—Presented by Mr. Matthews

- 68 students enrolled currently
- Working on getting teachers hired

9.6 Mountain View Academy Report—Referred by Ms. Weathers (Attachment)

9.7 Financial Report—Referred by Mr. Standridge (Attachment)

9.8 Activities Fund Report—Referred by Ms. Weathers (Attachment)

9.9 Student Body Representative Report—Presented by Ms. Owsley

- Prom was held at the grange (it was ready in time!) and it was a success
- 7-10 grade students applied to a summer program (MedTech) at LCC; every student at Lowell who applied was accepted
- Both baseball and softball did well and made it to state; track had two athletes make it to state—all sports are completed for the year
- ASB put together a surprise baby shower for Ms. Ruis

- Dinner concert was a success with 201 attendees and raised \$2400
- AP testing is finished
- Science Fair is next week
- Band/choir is leaving for Canada next week
- Spirit week next week
- Many field trips planned for the upcoming weeks
- June 7, ASB elections
- June 9, senior trip
- June 14, Choir concert
- Graduation June 17

#### 9.10 Principals Report—Presented by Ms. Graham

- Summer recreation and fitness program (Handout) which is open to the entire community grades 3-6
- 8 week plan; each week has a theme
- Asking families to sign up and which weeks or all weeks
- Academic summer school is still happening and activity camps will be in addition to: Science Camp, Iron Chef Camp, possibly a world cultures class, and drama camp culminating in a production
- Funded by title funds and some food service and grants

#### 9.11 Superintendent's Report—Presented by Dr. Hanline

#### 9.12 Board Members' Report

- The Dinner was wonderful and music was well done
- OSBA wants to know what is happening in schools and to report to them for the conference

## 10.0 **ADJOURNMENT**

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SUNGARD PENTAMATION  
 DATE: 06/07/2016  
 TIME: 16:26:44

LOWELL SCHOOL DISTRICT #71  
 CHECK REGISTER - BY FUND

PAGE NUMBER: 1  
 ACCTPA21

SELECTION CRITERIA: transact.ck\_date between '20160501 00:00:00.000' and '20160531 00:00:00.000'  
 ACCOUNTING PERIOD: 12/16

FUND - 100 - GENERAL FUND

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28543	05/04/16	2340	ALL SEASONS EQUIPME	1002543000000000	322	EQUIPMENT REPAIR	0.00	276.62
A101	28544	05/04/16	2584	BANNER BANK	1002410000000000	340	MATTHEWS TRAVEL	0.00	48.75
A101	28544	05/04/16	2584	BANNER BANK	1002543000000000	410	BASEBALL FENCING	0.00	247.97
TOTAL CHECK									296.72
A101	28546	05/04/16	1259	COASTWIDE LABORATOR	1002554000000000	460	CARPET VACUUM	0.00	698.17
A101	28548	05/04/16	2594	ES&A SIGN & AWNING	1002542000000000	540	READER BOARD DEPOSI	0.00	2,255.79
A101	28550	05/04/16	1901	JEFF CARDWELL	1002542000000000	324	CHIPPER RENTAL	0.00	320.00
A101	28552	05/04/16	2567	JOHN VONDOLOSKI	1002490000000000	410	PRINTER/OPEN HOUSE	0.00	324.64
A101	28553	05/04/16	1497	LOWELL SCHOOL ACTIV	100	R1990	MUSIC TRIP PMT	0.00	93.00
A101	28554	05/04/16	1752	OFFICE DEPOT	1002321000000000	410	OFFICE SUPPLIES	0.00	12.79
A101	28555	05/04/16	2279	OFFICEMAX	1002410000000000	410	OFFICE SUPPLIES	0.00	27.55
A101	28556	05/04/16	2345	PAULSEN ENVIRONMENT	1002542000000000	640	ASBESTOS INSPECTION	0.00	1,200.00
A101	28557	05/04/16	2441	SCHELSKY'S LANDSCAP	1002543000000000	640	BACKFLOW TEST	0.00	205.00
A101	28558	05/04/16	2497	SECURITY MONSTER	1002542000000000	329	MAY ALARM SERVICE	0.00	89.90
A101	28559	05/04/16	2518	SILKE COMMUNICATION	1002554000000000	640	FLEET RADIO SERVICE	0.00	231.84
A101	28561	05/04/16	2450	HOME DEPOT	1002542000000000	410	BLDG MAINTENANCE	0.00	14.97
A101	28561	05/04/16	2450	HOME DEPOT	1002554000000000	410	BCA TRANSP. MAINT	0.00	99.94
A101	28561	05/04/16	2450	HOME DEPOT	1002490000000000	410	BCA BLDG MAINT	0.00	111.92
A101	28561	05/04/16	2450	HOME DEPOT	1002490000000000	410	BCA CLASSROOMS	0.00	289.57
TOTAL CHECK									516.40
A101	28562	05/04/16	1022	U S BANK	1001131000110000	420	SOC. STUDIES TEXTS	0.00	36.00
A101	28562	05/04/16	1022	U S BANK	100	R1990	FLOWERS REIMB.	0.00	119.99
TOTAL CHECK									155.99
A101	28564	05/04/16	2475	WELLS FARGO FINANCI	1002574000000000	355	COPIER LEASE	0.00	585.50
A101	28565	V 05/06/16	1052	OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	-20.52
A101	28565	05/06/16	1052	OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	20.52
TOTAL CHECK									0.00
A101	28566	V 05/06/16	1939	OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	-0.50
A101	28566	05/06/16	1939	OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	0.50
TOTAL CHECK									0.00
A101	28567	05/10/16	1701	AMERICAN FIDELITY A	1002520000000000	241	DED:7309 A/F CANCER	0.00	16.50
A101	28568	05/10/16	1002	AFLAC	100	L472.125	DED:8017 AFLAC DSBL	0.00	14.98
A101	28568	05/10/16	1002	AFLAC	100	L472.125	DED:8108 AFLAC CNCR	0.00	41.65

SUNGARD PENTAMATION  
 DATE: 06/07/2016  
 TIME: 16:26:44

LOWELL SCHOOL DISTRICT #71  
 CHECK REGISTER - BY FUND

PAGE NUMBER: 2  
 ACCTPA21

SELECTION CRITERIA: transact.ck\_date between '20160501 00:00:00.000' and '20160531 00:00:00.000'  
 ACCOUNTING PERIOD: 12/16

FUND - 100 - GENERAL FUND

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28568	05/10/16	1002	AFLAC	100	L472.125	DED:8011 AFLAC STD	0.00	42.43
A101	28568	05/10/16	1002	AFLAC	100	L472.125	DED:8010 AFLAC ACDN	0.00	65.39
A101	28568	05/10/16	1002	AFLAC	100	L472.125	DED:8106 AFLAC P/A	0.00	123.76
TOTAL CHECK									288.21
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.731	DED:7299 CANCER A/T	0.00	6.00
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.733	DED:7303 A/F ACIDNT	0.00	8.10
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.734	DED:7310 A/F ACCIDE	0.00	33.40
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.734	DED:7304 125 ACIDNT	0.00	33.80
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.731	DED:7309 A/F CANCER	0.00	53.90
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.731	DED:7301 A/F-CANCER	0.00	118.70
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.730	DED:7300 A/F-DSBLTY	0.00	141.47
A101	28569	05/10/16	1701	AMERICAN FIDELITY A	100	L472.738	DED:7308 A.F. LIFE	0.00	150.50
TOTAL CHECK									545.87
A101	28570	05/10/16	1795	AMERICAN FIDELITY A	100	L472.076	DED:7111 TSA AM/FID	0.00	510.16
A101	28570	05/10/16	1795	AMERICAN FIDELITY A	100	L472.076	DED:7110 TSA-AM.FID	0.00	2,525.00
TOTAL CHECK									3,035.16
A101	28571	05/10/16	1710	AMERICAN FIDELITY A	100	L472.732	DED:7302 UNREMB MED	0.00	216.66
A101	28571	05/10/16	1710	AMERICAN FIDELITY A	100	L472.336	DED:7306 CHILDCARE	0.00	291.66
TOTAL CHECK									508.32
A101	28572	05/10/16	2321	AMERICAN FIDELITY H	100	L472.735	DED:7298 AM/FID HSA	0.00	1,944.98
A101	28573	05/10/16	1063	LOWELL S.D. SCHOLAR	100	L472.420	DED:8103 L. SCHOLAR	0.00	68.00
A101	28574	05/10/16	1206	OREGON DEPARTMENT O	100	L472.099	DED:0099 OR.DEPT.RV	0.00	384.54
A101	28575	05/10/16	1051	OREGON EDUCATION AS	100	L472.012	DED:8200 OEA	0.00	1,204.70
A101	28576	05/10/16	1052	OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	597.74
A101	28577	05/10/16	1939	OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	10.50
A101	28578	05/10/16	2183	LEGAL SHIELD	100	L472.740	DED:7350 PP LEGAL	0.00	93.65
A101	28579	05/10/16	2342	TEXAS LIFE	100	L472.736	DED:7606 TEXAS LIFE	0.00	48.00
A101	28579	05/10/16	2342	TEXAS LIFE	100	L472.736	DED:7607 TEXAS LIFE	0.00	120.95
TOTAL CHECK									168.95
A101	28580	05/10/16	1939	OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	0.50
A101	28580	05/10/16	1939	OSEA CHAPTER 118	100	L472.013	DED:8202 OSEA	0.00	20.52
A101	28580	V 05/10/16	1939	OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	-0.50
A101	28580	V 05/10/16	1939	OSEA CHAPTER 118	100	L472.013	DED:8202 OSEA	0.00	-20.52
TOTAL CHECK									0.00
A101	28582	V 05/10/16	1052	OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	-20.52
A101	28582	05/10/16	1052	OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	20.52
TOTAL CHECK									0.00
A101	28583	05/10/16	1939	OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	0.50

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28584	05/11/16	1230	CENTURY LINK	1002542000000000	351	MAY PHONE SERVICE	0.00	307.82
A101	28584	05/11/16	1230	CENTURY LINK	1002490000000000	351	MAY PHONE SERVICE	0.00	349.60
TOTAL CHECK									657.42
A101	28586	05/11/16	1015	AP EXAMS	1002230000000000	410	AP EXAMS	0.00	580.00
A101	28587	05/11/16	1613	BRIDGEWAY HOUSE	1001281000320000	371	APR. SCHOOL TUITION	0.00	8,250.00
A101	28588	05/11/16	2336	BROTHERS PLUMBING	1002490000000000	322	BLDG 2021 PLUMBING	0.00	2,700.00
A101	28590	05/11/16	1040	CITY OF LOWELL	1002554000000000	327	BCA SEWER/WATER	0.00	210.42
A101	28590	05/11/16	1040	CITY OF LOWELL	1002542000000000	327	BCA SEWER/WATER	0.00	210.42
A101	28590	05/11/16	1040	CITY OF LOWELL	1002490000000000	327	BCA SEWER/WATER	0.00	210.42
A101	28590	05/11/16	1040	CITY OF LOWELL	1002554000000000	327	SEWER/WATER	0.00	881.01
A101	28590	05/11/16	1040	CITY OF LOWELL	1002554000000000	327	SEWER/WATER	0.00	85.68
TOTAL CHECK									1,597.95
A101	28591	05/11/16	1797	CROCKETT'S INTERSTA	1002554000000000	322	TOW BUS #2	0.00	225.00
A101	28592	05/11/16	2141	GRAINGER	1002542000000000	410	BLDG MAINTENANCE	0.00	108.62
A101	28593	05/11/16	1157	GUARD PUBLISHING CO	1002310000000000	640	BUDGET MTG NOTICES	0.00	145.00
A101	28594	05/11/16	2595	ISLAND FENCE & WIND	100	R1990	FENCE DAMAGE CLAIM	0.00	450.00
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BCA BLDG MAINTENANC	0.00	333.64
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BCA BLDG RETURN	0.00	-1.90
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BCA BLDG MAINTENANC	0.00	3.35
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINTENANCE	0.00	3.49
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BCA BLDG MAINT.	0.00	45.99
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINTENANCE	0.00	28.99
TOTAL CHECK									413.56
A101	28596	05/11/16	2105	JOHNNIE MATTHEWS	1002410000000000	340	MATTHEWS TRAVEL	0.00	120.41
A101	28597	05/11/16	2226	KANDAYCE DAY	1002410000000000	340	K.DAY TRAVEL REIMB.	0.00	69.10
A101	28598	05/11/16	2596	KRYSTLE RODRIGUEZ-L	1002230000000000	410	TESTING SNACKS	0.00	47.46
A101	28598	05/11/16	2596	KRYSTLE RODRIGUEZ-L	1001111000000040	410	CLASSROOM SUPPLIES	0.00	74.51
TOTAL CHECK									121.97
A101	28599	05/11/16	2312	LANE COUNTY SCHOOL	1002554000000000	322	BUS #5 REPAIR	0.00	671.29
A101	28600	05/11/16	1495	LES SCHWAB TIRE CEN	1002554000000000	412	SET OF TIRES	0.00	1,048.04
A101	28602	05/11/16	2167	SANIPAC	1002542000000000	328	HG GARBAGE SERVICE	0.00	215.85
A101	28602	05/11/16	2167	SANIPAC	1002542000000000	328	GARBAGE SERVICE	0.00	259.30
A101	28602	05/11/16	2167	SANIPAC	1002490000000000	328	DEBRIS DISPOSAL	0.00	1,487.60
A101	28602	05/11/16	2167	SANIPAC	1002554000000000	328	DEBRIS DISPOSAL	0.00	4,100.74
TOTAL CHECK									6,063.49

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28603	05/11/16	2242	SQUARE DEAL LUMBER	1002490000000000	410	BCA BLDG MATERIALS	0.00	167.16
A101	28606	05/11/16	2409	TONY RIUS	1001131000210000	410	CINCO DE MAYO EXP.	0.00	40.41
A101	28608	05/11/16	1166	VERIZON	1002554000000000	351	CELL PHONE SERVICE	0.00	9.72
A101	28608	05/11/16	1166	VERIZON	1002542000000000	351	CELL PHONE SERVICE	0.00	112.31
TOTAL CHECK									122.03
A101	28609	05/11/16	1170	WESTERN BUS SALES	1002554000000000	410	VEHICLE PARTS	0.00	133.25
A101	28610	05/11/16	1623	WILLAMETTE ESD	1002321000000000	470	MAY PENTAMATION	0.00	826.59
A101	28611	05/12/16	1225	POSTMASTER	1002574000000000	353	MAY MAILER	0.00	158.30
A101	28612	05/18/16	2149	CENTURY LINK-LONG D	1002542000000000	351	LONG DISTANCE SVCS	0.00	14.43
A101	28613	05/18/16	2584	BANNER BANK	1001131000050000	480	COMPUTER HARDWARE	0.00	738.90
A101	28613	05/18/16	2584	BANNER BANK	1001131000180000	410	MATH SOFTWARE	0.00	5.25
A101	28613	05/18/16	2584	BANNER BANK	1001131000050000	410	SMART BOARD PEN	0.00	41.89
TOTAL CHECK									786.04
A101	28615	05/18/16	2403	BRIAN BEARD	1001131000550000	410	WOODSHOP SUPPLIES	0.00	14.99
A101	28616	05/18/16	2160	BUDGET BLINDS OF EU	1002490000000000	460	WINDOW BLINDS	0.00	1,136.00
A101	28616	05/18/16	2160	BUDGET BLINDS OF EU	1002554000000000	460	WINDOW BLINDS	0.00	95.00
TOTAL CHECK									1,231.00
A101	28617	05/18/16	2587	CHANTELLE WENDT	1002321000000000	640	FINGERPRINT FEE	0.00	15.00
A101	28618	05/18/16	1259	COASTWIDE LABORATOR	1002542000000000	410	CUSTODIAL SUPPLIES	0.00	400.99
A101	28619	05/18/16	1565	COLETTE ULLRICH	1001111000000001	410	KINDER PACKETS	0.00	75.84
A101	28620	05/18/16	2597	HARVEY'S SELECTIVE	1002543000000000	322	TREE REMOVAL	0.00	3,400.00
A101	28622	05/18/16	1884	JASPER MOUNTAIN	1001281000320000	371	MAR. EDUCATION SVCS	0.00	882.00
A101	28622	05/18/16	1884	JASPER MOUNTAIN	1001281000320000	371	JAN. EDUCATION. SVC	0.00	1,071.00
A101	28622	05/18/16	1884	JASPER MOUNTAIN	1001281000320000	371	NOV. EDUCATION SVCS	0.00	1,071.00
A101	28622	05/18/16	1884	JASPER MOUNTAIN	1001281000320000	371	FEB. EDUCATION SVCS	0.00	1,260.00
A101	28622	05/18/16	1884	JASPER MOUNTAIN	1001281000320000	371	APR. EDUCATION SVCS	0.00	4,788.00
A101	28622	05/18/16	1884	JASPER MOUNTAIN	1001281000320000	371	DEC. EDUCATION SVCS	0.00	567.00
TOTAL CHECK									9,639.00
A101	28623	05/18/16	1302	JOHN BOYLE	1002120000000000	340	MILEAGE REIMB.	0.00	522.72
A101	28624	05/18/16	2567	JOHN VONDOLOSKI	1002490000000000	389	MAY CONSULTING	0.00	5,000.00
A101	28624	05/18/16	2567	JOHN VONDOLOSKI	1002490000000000	340	JOB FAIR TRAVEL	0.00	10.00
A101	28624	05/18/16	2567	JOHN VONDOLOSKI	1002490000000000	640	FINGERPRINT FEES	0.00	20.00
A101	28624	05/18/16	2567	JOHN VONDOLOSKI	1002490000000000	410	OPEN HOUSE SUPPLIES	0.00	83.00
TOTAL CHECK									5,113.00
A101	28625	05/18/16	1334	LANE COMMUNITY COLL	1002574000000000	355	PRINT 'THE BRIDGE'	0.00	244.50

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28626	05/18/16	2483	NATIONAL PHOTOCOPY	1002574000000000	322	COPIER REPAIR PARTS	0.00	104.77
A101	28627	05/18/16	1752	OFFICE DEPOT	1002321000000000	410	OFFICE SUPPLIES	0.00	50.44
A101	28628	05/18/16	2279	OFFICEMAX	1002410000000000	410	OFFICE SUPPLIES	0.00	112.76
A101	28629	05/18/16	1211	OSBA	1002310000000000	640	MAY POLICY PLUS FEE	0.00	50.00
A101	28630	05/18/16	2444	TAYLOR LLEWELLYN	1002230000000000	410	TESTING EXPENSES	0.00	166.32
A101	28631	05/18/16	1589	THERMO FLUIDS INC.	1002554000000000	640	OIL RECYCLING FEE	0.00	80.00
A101	28634	05/18/16	2398	MOUNTAIN VIEW ACADE	1001288000000000	360	2014-15 SSF FINAL A	0.00	-7,342.00
A101	28634	05/18/16	2398	MOUNTAIN VIEW ACADE	1001288000000000	360	FINAL SSF PMT 2015-	0.00	142,233.00
TOTAL CHECK								0.00	134,891.00
A101	28635	05/25/16	2573	ADVANCE AUTO PARTS	1002554000000000	410	VEHICLE SUPPLIES	0.00	39.99
A101	28636	05/25/16	2584	BANNER BANK	1002543000000000	410	GROUNDS MAINT.	0.00	13.07
A101	28636	05/25/16	2584	BANNER BANK	1002310000000000	410	BOARD SUPPLIES	0.00	24.23
A101	28636	05/25/16	2584	BANNER BANK	1002542000000000	410	BLDG MAINTENANCE	0.00	28.72
A101	28636	05/25/16	2584	BANNER BANK	1002321000000000	340	SUPT. MTG MEALS	0.00	292.07
A101	28636	05/25/16	2584	BANNER BANK	1002554000000000	410	TRANSP. MAINT.	0.00	47.84
A101	28636	05/25/16	2584	BANNER BANK	1002410000000000	340	MATTHEWS TRAVEL	0.00	65.00
A101	28636	05/25/16	2584	BANNER BANK	1002410000000000	410	ELEM. EXPENSES	0.00	74.32
A101	28636	05/25/16	2584	BANNER BANK	1002661000000000	640	BANK FEE	0.00	8.30
TOTAL CHECK								0.00	553.55
A101	28637	05/25/16	2016	BENJAMIN SILEBI	1002490000000000	410	BCA OPEN HOUSE	0.00	21.38
A101	28637	05/25/16	2016	BENJAMIN SILEBI	1002554000000000	410	TRANSP. SUPPLIES	0.00	36.98
A101	28637	05/25/16	2016	BENJAMIN SILEBI	1002490000000000	410	BCA SUPPLIES	0.00	46.96
A101	28637	05/25/16	2016	BENJAMIN SILEBI	1002543000000000	410	GROUNDS MAINT.	0.00	6.73
TOTAL CHECK								0.00	112.05
A101	28639	05/25/16	1705	DAN SMITH	1002490000000000	340	MILEAGE REIMB.	0.00	32.94
A101	28641	05/25/16	1750	I5-GLASS COMPANY	1002542000000000	322	REPAIR WINDOWS	0.00	764.00
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BLDG MATERIALS	0.00	9.92
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BLDG MATERIALS	0.00	14.88
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BLDG MAINTENANCE	0.00	20.06
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BLDG MAINTENANCE	0.00	26.49
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002543000000000	410	GROUNDS MAINT.	0.00	202.17
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINTENANCE	0.00	204.75
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BLDG MATERIALS	0.00	665.02
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002543000000000	410	GROUNDS MAINT.	0.00	41.61
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	1002490000000000	410	BLDG MATERIALS	0.00	115.42
TOTAL CHECK								0.00	1,300.32
A101	28643	05/25/16	2567	JOHN VONDOLOSKI	1002490000000000	640	ADMIN. LICENSE	0.00	342.00

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A101	28644	05/25/16	2596	KRYSTLE RODRIGUEZ-L	1001111000000040	410	CLASSROOM SUPPLIES	0.00	70.80
A101	28645	05/25/16	1644	LANE ELECTRIC COOPE	1002554000000000	325	APR/MAY ELECTRICITY	0.00	217.76
A101	28645	05/25/16	1644	LANE ELECTRIC COOPE	1002490000000000	325	APR/MAY ELECTRICITY	0.00	380.73
A101	28645	05/25/16	1644	LANE ELECTRIC COOPE	1002542000000000	325	APR/MAY ELECTRICITY	0.00	2,108.50
TOTAL CHECK								0.00	2,706.99
A101	28646	05/25/16	2317	LANE FOREST PRODUCT	1002554000000000	640	DUMP FEE	0.00	16.00
A101	28646	05/25/16	2317	LANE FOREST PRODUCT	1002554000000000	410	ROCK	0.00	44.00
TOTAL CHECK								0.00	60.00
A101	28647	05/25/16	2311	MICHELLE STEPHENS	1002310000000000	410	BOARD SUPPLIES	0.00	21.87
A101	28648	05/25/16	2398	MOUNTAIN VIEW ACADE	1001288000000000	360	BLDG/ADV. REIMBURSE	0.00	7,392.88
A101	28649	05/25/16	1202	OETC	1001111000000000	480	HEADPHONES	0.00	141.00
A101	28649	05/25/16	1202	OETC	1001131000050000	480	HEADPHONES	0.00	132.00
TOTAL CHECK								0.00	273.00
A101	28650	05/25/16	1789	OREGON DEPARTMENT O	1002321000000000	640	CRIMINAL HIST. CK	0.00	5.00
A101	28651	05/25/16	1225	POSTMASTER	1002574000000000	353	'THE BRIDGE' POSTAG	0.00	91.25
A101	28651	05/25/16	1225	POSTMASTER	1002574000000000	353	FLYER POSTAGE CREDI	0.00	-5.82
TOTAL CHECK								0.00	85.43
A101	28652	05/25/16	2242	SQUARE DEAL LUMBER	1002490000000000	410	BLDG MATERIALS	0.00	50.40
A101	28652	05/25/16	2242	SQUARE DEAL LUMBER	1002490000000000	410	BLDG MATERIALS	0.00	123.41
TOTAL CHECK								0.00	173.81
A101	28654	05/25/16	1170	WESTERN BUS SALES	1002554000000000	410	VEHICLE SUPPLIES	0.00	28.74
A101	28654	05/25/16	1170	WESTERN BUS SALES	1002554000000000	410	VEHICLE SUPPLIES	0.00	36.79
A101	28654	05/25/16	1170	WESTERN BUS SALES	1002554000000000	410	VEHICLE PARTS	0.00	72.07
TOTAL CHECK								0.00	137.60
TOTAL CASH ACCOUNT								0.00	211,812.15
TOTAL FUND								0.00	211,812.15

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FUND - 206 - P.E. GRANT

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28621	05/18/16	2557	HEALTHY MOVES	2061111000000000	389	PE INSTRUCTION	0.00	270.96
TOTAL CASH ACCOUNT								0.00	270.96
TOTAL FUND								0.00	270.96

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FUND - 208 - GEAR UP

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28549	05/04/16	2593	HEATHMAN LODGE	2082120000000000	340	LLEWELLYN TRAVEL	0.00	674.80
A101	28555	05/04/16	2279	OFFICEMAX	2082120000000000	410	GEAR UP SUPPLIES	0.00	272.56
A101	28562	05/04/16	1022	U S BANK	2082120000000000	340	GEAR UP LUNCH	0.00	331.50
A101	28562	05/04/16	1022	U S BANK	2082120000000000	410	GEAR UP BINDERS	0.00	94.44
TOTAL CHECK								0.00	425.94
A101	28585	05/11/16	2316	ABBAY BORKIN-RIUS	2082120000000000	410	GEAR UP 2.5 EXP.	0.00	702.00
A101	28605	05/11/16	1997	TONI TAYLOR	2082120000000000	340	TAYLOR GEAR UP TRAV	0.00	136.08
TOTAL CASH ACCOUNT								0.00	2,211.38
TOTAL FUND								0.00	2,211.38

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FUND - 234 - CATCH GRANT

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28544	05/04/16	2584	BANNER BANK	2342210000000000	410	PE EQUIPMENT	0.00	342.74
A101	28636	05/25/16	2584	BANNER BANK	2342210000000000	410	PE EQUIPMENT	0.00	321.80
TOTAL CASH ACCOUNT								0.00	664.54
TOTAL FUND								0.00	664.54

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FUND - 246 - PERKINS 15-16

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28632	05/18/16	1022	U S BANK	2462210000000000	460	VERTICAL MILL	0.00	3,045.00
TOTAL CASH ACCOUNT								0.00	3,045.00
TOTAL FUND								0.00	3,045.00

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FUND - 260 - YTP

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28562	05/04/16	1022	U S BANK	2602129000000000	410	YTP SEEDS	0.00	7.90
TOTAL CASH ACCOUNT								0.00	7.90
TOTAL FUND								0.00	7.90

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FUND - 274 - EBISS BREADTH 15-16

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28597	05/11/16	2226	KANDAYCE DAY	2742240000000000	410	STUDENT INCENTIVES	0.00	100.00
TOTAL CASH ACCOUNT								0.00	100.00
TOTAL FUND								0.00	100.00

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FUND - 294 - RENTAL HOUSES

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28544	05/04/16	2584	BANNER BANK	2942540000000000	460	RENTAL APPLIANCES	0.00	982.39
A101	28545	05/04/16	2336	BROTHERS PLUMBING	2942540000000000	322	SEWER LINE REPAIR	0.00	135.00
A101	28551	05/04/16	1071	JERRY'S BUILDING MA	2942540000000000	410	BCA RENTAL MAINT.	0.00	95.48
A101	28551	05/04/16	1071	JERRY'S BUILDING MA	2942540000000000	410	BCA RENTAL MAINT.	0.00	150.89
A101	28551	05/04/16	1071	JERRY'S BUILDING MA	2942540000000000	410	BCA RENTAL MAINT.	0.00	16.96
A101	28551	05/04/16	1071	JERRY'S BUILDING MA	2942540000000000	410	BCA RENTAL MAINT.	0.00	-48.03
TOTAL CHECK								0.00	215.30
A101	28561	05/04/16	2450	HOME DEPOT	2942540000000000	410	BCA RENTAL MAINT.	0.00	600.17
A101	28588	05/11/16	2336	BROTHERS PLUMBING	2942540000000000	322	BLDG 80 PLUMBING	0.00	4,013.00
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	2942540000000000	410	RENTAL MAINT.	0.00	28.98
A101	28595	05/11/16	1071	JERRY'S BUILDING MA	2942540000000000	410	RENTAL MAINT.	0.00	200.85
TOTAL CHECK								0.00	229.83
A101	28616	05/18/16	2160	BUDGET BLINDS OF EU	2942540000000000	460	WINDOW BLINDS	0.00	1,364.00
A101	28638	05/25/16	2160	BUDGET BLINDS OF EU	2942540000000000	460	RENTAL - BLINDS	0.00	1,380.00
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	2942540000000000	410	BLDG MAINTENANCE	0.00	70.22
A101	28642	05/25/16	1071	JERRY'S BUILDING MA	2942540000000000	410	BLDG MAINTENANCE	0.00	76.99
TOTAL CHECK								0.00	147.21
A101	28645	05/25/16	1644	LANE ELECTRIC COOPE	2942540000000000	325	APR/MAY ELECTRICITY	0.00	161.44
TOTAL CASH ACCOUNT								0.00	9,228.34
TOTAL FUND								0.00	9,228.34

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FUND - 295 - ATHLETICS & ACTIVITIES

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28589	05/11/16	2352	BUCK'S SANITARY SER	2951132000000775	410	SOFTBALL FIELD TOIL	0.00	85.00
TOTAL CASH ACCOUNT								0.00	85.00
TOTAL FUND								0.00	85.00

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FUND - 297 - FOOD SERVICE FUND

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28547	05/04/16	1565	COLETTE ULLRICH	2973100000000000	450	FOOD SUPPLIES	0.00	41.09
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	-23.36
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	-20.65
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	-13.97
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	176.91
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	58.65
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	346.42
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	1,079.91
A101	28560	05/04/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	939.40
TOTAL CHECK								0.00	2,543.31
A101	28563	05/04/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	225.05
A101	28563	05/04/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	418.15
TOTAL CHECK								0.00	643.20
A101	28601	05/11/16	2304	NATHAN BOWERS	2973100000000000	410	CAFE. WHITEBOARDS	0.00	39.98
A101	28604	05/11/16	1776	SYSCO FOOD SERVICES	2973100000000000	410	FOOD SUPPLIES	0.00	83.78
A101	28604	05/11/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	123.09
A101	28604	05/11/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	69.96
A101	28604	05/11/16	1776	SYSCO FOOD SERVICES	2973100000000000	410	KITCHEN SUPPLIES	0.00	35.76
A101	28604	05/11/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	52.19
A101	28604	05/11/16	1776	SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	656.75
TOTAL CHECK								0.00	1,021.53
A101	28607	05/11/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	171.50
A101	28607	05/11/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	192.90
A101	28607	05/11/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	332.35
TOTAL CHECK								0.00	696.75
A101	28608	05/11/16	1166	VERIZON	2973100000000000	351	CELL PHONE SERVICE	0.00	20.73
A101	28614	05/18/16	2377	BILLY REID	2973100000000000	389	REID JUN CONSULTING	0.00	2,000.00
A101	28619	05/18/16	1565	COLETTE ULLRICH	2973100000000000	450	FOOD SUPPLIES	0.00	53.67
A101	28633	05/18/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	364.70
A101	28640	05/25/16	2291	EARTH20	2973100000000000	450	FOOD SUPPLIES	0.00	44.15
A101	28640	05/25/16	2291	EARTH20	2973100000000000	450	FOOD SUPPLIES	0.00	24.75
TOTAL CHECK								0.00	68.90
A101	28653	05/25/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	128.80
A101	28653	05/25/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	192.90
A101	28653	05/25/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	225.05
A101	28653	05/25/16	2193	UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	407.50
TOTAL CHECK								0.00	954.25
TOTAL CASH ACCOUNT								0.00	8,448.11
TOTAL FUND								0.00	8,448.11

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FUND - 400 - CAPITAL PROJECTS

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	NAME	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	28613	05/18/16	2584	BANNER BANK	4002660000000000	480	FIBERDYNE LABS	0.00	45.05
TOTAL CASH ACCOUNT								0.00	45.05
TOTAL FUND								0.00	45.05
TOTAL REPORT								0.00	235,918.43

# Oregon School Boards Association Selected Sample Policy

Code: **BBFA**  
Adopted: **Recommend Approval**

## Board Member Ethics and Conflicts of Interest

No Board member will use his/her official position or office to obtain personal financial benefit or to avoid financial detriment for him or herself, relatives or household members, or for any business with which the Board member, a household member or a relative is associated.

This prohibition does not apply to any part of an official compensation package, honorarium allowed by ORS 244.042, reimbursement of expenses, or unsolicited awards of professional achievement. Further, this prohibition does not apply to gifts from one without a legislative or administrative interest. Nor does it apply if the gift is under the annual \$50 gift limit from one who has a legislative or administrative interest in any matter subject to the decision or vote of the Board member. District-provided meals at board meetings are acceptable under the reimbursement of expenses exception.

### I. Conflicts of Interest

“Business” means any corporation, partnership, proprietorship, enterprise, association, franchise, firm, organization, self-employed individual or any legal entity operated for economic gain. This definition excludes any income-producing tax exempt 501(c) not-for-profit corporation with which a public official or a relative of the public official is associated only as a member or board director or in a nonremunerative capacity.

“Business with which a Board member or relative is associated” means any private business or closely held corporation of which a Board member or relative is a director, officer, owner, employee or agent or any private business or closely held corporation in which a Board member or relative owns or has owned stock, another form of equity interest, stock options or debt instruments worth \$1,000 or more at any point in the preceding year; any publicly held corporation in which a Board member or relative owns or has owned \$100,000 or more in stock or another form of equity interest, stock options or debt instruments at any point in the preceding calendar year; or any publicly held corporation of which a Board member or relative is a director or officer.

“Relative” means: 1) the Board member’s or candidate’s spouse<sup>1</sup>, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the Board member; or 2) the spouse of the Board member’s or candidate’s parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the spouse of the Board member. Relative also includes any individual for whom the Board member has a legal support obligation, whose employment provides benefits<sup>2</sup> to the Board member, or who receives any benefit from the Board member’s public employment.

“Member of the household” means any person who resides with the public official.

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<sup>1</sup>The term spouse includes domestic partner.

<sup>2</sup>Examples of benefits may include, but not be limited to, elements of an official compensation package including benefits such as insurance, tuition or retirement allotments.

No Board member will solicit or receive, either directly or indirectly, any pledge or promise of future employment based on any understanding that the Board member's vote, official action or judgment would be thereby influenced.

No Board member will attempt to use or use for personal gain any confidential information gained through his/her official position or association with the district. A Board member will respect individuals' privacy rights when dealing with confidential information gained through association with the district.

If a Board member participates in the authorization of a public contract, the Board member may not have a direct beneficial financial interest in that public contract for two years after the date the contract was authorized.

Individual Board members and the Board as a public entity are bound by the ethics laws for public officials as stated in Oregon law.

### **Potential Conflict of Interest**

"Potential conflict of interest" means any action or any decision or recommendation by a Board member that could result in a financial benefit or detriment for self or relatives or for a business with which the Board member or relatives are associated, unless otherwise provided by law.

A Board member must publicly declare a potential conflict of interest. A Board member may, after declaring his/her potential conflict of interest, either vote or abstain on the issue. Abstaining from a vote does not meet the legal requirement of publicly stating a potential conflict.

### **Actual Conflict of Interest**

"Actual conflict of interest" means any action or any decision or recommendation taken by a Board member that would result in a financial benefit or detriment to self or relatives or for any business with which the Board member or relatives are associated, unless otherwise provided by law.

A Board member must publicly declare an actual conflict of interest. The Board member may not vote lawfully if an actual conflict of interest exists unless a vote is needed to meet a minimum requirement of votes to take official action. Such a vote does not allow the Board member to participate in any discussion or debate on the issue out of which an actual conflict arises.

### **Class Exception**

It will not be a conflict of interest if the Board member's action would affect to the same degree a class consisting of all inhabitants of the state, or a smaller class consisting of an industry, occupation or other group including one of which or in which the person, or the person's relative or business with which the person or the person's relative is associated, is a member or is engaged. For example, if a Board member's spouse is a member of the collective bargaining unit, the Board member may vote to approve the contract, as it will affect all members of that class to the same degree. However, if the collective bargaining unit is very small, the class exception may not apply. Similarly, if the contract contains special provisions that might apply only to particular persons, then the class exception may not apply. For example, if a Board member's spouse is the only one in the bargaining unit that has a doctorate and there is a pay differential for employees with doctorates in the collective bargaining agreement, the Board member should not vote on the contract.

## **II. Gifts**

Board members are public officials and therefore will not solicit or accept a gift or gifts with an aggregate value in excess of \$50 from any single source in a calendar year that has a legislative or administrative interest in any matter subject to the decision or vote of the Board member. All gift related provisions apply to the Board member, their relatives, and members of their household. The \$50 gift limit applies separately to the Board member and to the Board member's relatives or members of household, meaning that the Board member, each member of their household and relative can accept up to \$50 each from the same source/gift giver. 1—"Gift" means something of economic value given to a Board member without valuable consideration of equivalent value, which is not extended to others who are not public officials on the same terms and conditions.

2—"Relative" means: a) the Board member's or candidate's spouse<sup>3</sup>, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the Board member; or b) the spouse of the Board member's or candidate's parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the spouse of the Board member. Relative also includes any individual for whom the Board member has a legal support obligation, whose employment provides benefits<sup>4</sup> to the Board member, or who receives any benefit from the Board member's public employment.

3—"Member of the household" means any person who resides with the Board member.

### **Determining the Source of Gifts**

Board members should not accept gifts in any amount without obtaining information from the gift giver as to who is the source of the gift. It is the Board member's personal responsibility to ensure that no single source provides gifts exceeding an aggregate value of \$50 in a calendar year, if the source has a legislative or administrative interest in any matter subject to the decision or vote of the Board member. If the giver does not have a legislative/administrative interest, the ethics rules on gifts do not apply and the Board member need not keep track of it, although they are advised to do so anyway in case of a later dispute.

### **Determining Legislative and Administrative Interest**

A "legislative or administrative interest" means an economic interest distinct from that of the general public, in any action subject to the decision or vote of a person acting in the capacity of a Board member. For example, everyone within a county has a general interest in the fire department, but the person who sells the uniforms to the fire department has a legislative or administrative interest in the fire department that is distinct from the general public.

### **Determining the Value of Gifts**

The fair market value of the merchandise, goods, or services received will be used to determine benefit or value.

"Fair market value" is the dollar amount goods or services would bring if offered for sale by a person who desired, but was not obligated, to sell and purchased by one who is willing, but not obligated, to buy. Any portion of the price that was donated to charity, however, does not count toward the fair market value of the gift if the Board member does not claim the charitable contribution on personal tax returns. Below are acceptable ways to calculate the fair market value of a gift:

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<sup>3</sup>Ibid. p. 1

<sup>4</sup>Ibid. p. 1

1. In calculating the per person cost at receptions or meals the payor of the Board member's admission or meal will include all costs other than any amount donated to a charity.  
For example, a person with a legislative or administrative interest buys a table for a charitable dinner at \$100 per person. If the cost of the meal was \$25 and the amount donated to charity was \$75, the benefit conferred on the Board member is \$25. This example requires that the Board member does not claim the charitable contribution on personal tax returns.
2. For receptions and meals with multiple attendees, but with no price established to attend, the source of the Board member's meal or reception will use reasonable methods to determine the per person value or benefit conferred. The following examples are deemed reasonable methods of calculating value or benefit conferred:
  - a. The source divides the amount spent on food, beverage and other costs (other than charitable contributions) by the number of persons whom the payor reasonably expects to attend the reception or dinner;
  - b. The source divides the amount spent on food, beverage and other costs (other than charitable contributions) by the number of persons who actually attend the reception or dinner; or
  - c. The source calculates the actual amount spent on the Board member.
3. Upon request by the Board member, the source will give notice of the value of the merchandise, goods, or services received.
4. Attendance at receptions where the food or beverage is provided as an incidental part of the reception is permitted without regard to the fair market value of the food and beverage provided.

#### **Value of Unsolicited Tokens or Awards: Resale Value**

Board members may accept unsolicited tokens or awards that are engraved or are otherwise personalized items. Such items are deemed to have a resale value under \$25 (even if the personalized item cost the source more than \$50), unless the personalized item is made from gold or some other valuable material that would have value over \$25 as a raw material.

#### **Entertainment**

Board members may not solicit or accept any gifts of entertainment over \$50 in value from any single source in a calendar year that has a legislative or administrative interest in any matter subject to the decision or vote of the Board member unless:

1. The entertainment is incidental to the main purpose of another event (i.e., a band playing at a reception). Entertainment that involves personal participation is not incidental to another event (such as a golf tournament at a conference); or
2. The Board member is acting in their official capacity for a ceremonial purpose.

Entertainment is ceremonial when a Board member appears at an entertainment event for a "ceremonial purpose" at the invitation of the source of the entertainment who requests the presence of the Board member at a special occasion associated with the entertainment. Examples of an appearance by a Board member at an entertainment event for a ceremonial purpose include throwing the first pitch at a baseball game, appearing in a parade and ribbon cutting for an opening ceremony.

#### **Exceptions**

The following are exceptions to the ethics rules on gifts:

3. Campaign contributions are not considered gifts under the ethics rules;
4. Gifts from “relatives” and “members of the household” to the Board member are permitted in an unlimited amount; they are not considered gifts under the ethics rules;
5. Informational or program material, publications, or subscriptions related to the recipient’s performance of official duties;
6. Contributions made to a legal expense trust fund if certain requirements are met;
7. Food, lodging, and travel generally count toward the \$50 aggregate amount per year from a single source with a legislative or administrative interest, with the following exceptions:
  - a. Organized Planned Events. Board members are permitted to accept payment for travel conducted in the Board member’s official capacity, for certain limited purposes:
    - (1) Reasonable expenses (i.e., food, lodging, travel, fees) for attendance at a convention, fact-finding mission or trip, or other meeting do not count toward the \$50 aggregate amount IF:
      - (a) The Board member is scheduled to deliver a speech, make a presentation, participate on a panel, or represent the district; AND
        - i) The giver is a unit of a:
          - a) Federal, state, or local government;
          - b) An Oregon or federally recognized Native American Tribe; OR
          - c) Nonprofit corporation.
        - (b) The Board member is representing the district:
          - i) On an officially sanctioned trade-promotion or fact-finding mission; OR
          - ii) Officially designated negotiations or economic development activities *where receipt of the expenses is approved in advance by the Board.*
      - (2) The purpose of this exception is to allow Board members to attend organized, planned events and engage with the members of organizations by speaking or answering questions, participating in panel discussions or otherwise formally discussing matters in their official capacity. This exception to the gift definition does not authorize private meals where the participants engage in discussion.
8. Food or beverage, consumed at a reception, meal, or meeting IF held by an organization and IF the Board member is representing the district. Again, this exception does not authorize private meals where the participants engage in discussion.

“Reception” means a social gathering. Receptions are often held for the purpose of extending a ceremonial or formal welcome and may include private or public meetings during which guests are honored or welcomed. Food and beverages are often provided, but not as a plated, sit-down meal;

9. Food or beverage consumed by Board member acting in an official capacity in the course of financial transactions between the public body and another entity described in ORS 244.020(6)(b)(I)(i);
10. Waiver or discount of registration expenses or materials provided to Board member at a continuing education event that the Board member may attend to satisfy a professional licensing requirement;
11. A gift received by the Board member as part of the usual or customary practice of the Board member's private business, employment or position as a volunteer that bears no relationship to the Board member's holding of public office.

**Honoraria**

A Board member may not solicit or receive, whether directly or indirectly, honoraria for the Board member or any relative or member of the household of the Board member if the honoraria are solicited or received in connection with the official duties of the Board member.

The honoraria rules do not prohibit the solicitation or receipt of an honorarium or a certificate, plaque, commemorative token or other item with a value of \$50 or less; or the solicitation or receipt of an honorarium for services performed in relation to the private profession, occupation, avocation or expertise of the Board member or candidate.

END OF POLICY

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**Legal Reference(s):**

[ORS 162.015](#) to -162.035  
[ORS 162.405](#) to -162.425

[ORS 244.010](#) to -244.400  
[ORS 332.055](#)

[OAR 199-005-00030001](#) to -199-  
~~020010-00200150~~

38 OR. ATTY. GEN. OP. 1995 (1978)  
 OR. ETHICS COMM'N, OR. GOV'T ETHICS LAW, A GUIDE FOR PUBLIC OFFICIALS.  
 HR6/42/441/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **BBFB**  
Adopted: **Recommend Approval**

## Board Member Ethics and Nepotism

In order to avoid both potential and actual conflicts of interests, Board members will abide by the following rules when a Board member's relative or member of the household is seeking and/or holds a position with the district:

1. A Board member may not appoint, employ, promote, discharge, fire, or demote or advocate for such an employment decision for a relative or member of the household, unless the Board member complies with the conflict of interest requirements of ORS Chapter 244.  
  
2. This policy does not apply to decisions regarding unpaid volunteer positions unless it is a Board member position or another Board-related unpaid volunteer position (i.e. a Board committee position).
2. 3. A Board member may not participate as a public official in any interview, discussion, or debate regarding the appointment, employment, promotion, discharge, firing, or demotion of a relative or member of the household. A Board member may still serve as a reference or provide a recommendation.

For the purposes of this policy:

a "Member of the household" means any person who resides with the Board member, and

"Relative" means: 1. The Board member's spouse<sup>1</sup>, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the Board member; or 2. The spouse of the Board member's parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the spouse of the Board member. Relative also includes any individual for whom the Board member has a legal support obligation, whose employment provides benefits<sup>2</sup> to the Board member, or who receives any benefit from the Board member's public employment.

### Class Exception

It will not be a conflict of interest if the Board member's action would affect to the same degree a class including the Board member's relative or household member. For example, if a Board member's spouse is a member of the collective bargaining unit, the Board member may vote to approve the contract, as it will affect all members of that class to the same degree. However, if the collective bargaining unit is very small, the class exception may not apply. Similarly, if the contract contains special provisions that might apply only to particular persons, then the class exception may not apply. For example, if a Board member's spouse is the only one in the bargaining unit that has a doctorate and there is a pay differential

<sup>1</sup>The term spouse includes domestic partner.

<sup>2</sup>Examples of benefits may include, but not be limited to, elements of an official compensation package including benefits such as insurance, tuition or retirement allotments.

for employees with doctorates in the collective bargaining agreement, the Board member should not vote on the contract.

END OF POLICY

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**Legal Reference(s):**

[ORS 244.010](#) to -244.400  
[ORS 659A.309](#)

[OAR 199-005-00030001](#) to -199-  
[020010-00200150](#)

OR. ETHICS COMM'N, OR. GOV'T ETHICS LAW, A GUIDE FOR PUBLIC OFFICIALS.  
HR6/12/14/1/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **EFAA-AR**  
Adopted: **Recommend Approval**

## Reimbursable School Meals and Milk Programs (National School Lunch Program, School Breakfast Program, Special Milk Program)

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

### Meal Pricing Procedures

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

<sup>1</sup>The new requirement under Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. 1751 §§ 205 establishes new criteria for equity in school lunch pricing.

<sup>2</sup>According to Direct Certification and Certification of Homeless, Migrant and Runaway Children for Free School Meals, 7 C.F.R Part 245 (2011).

## Application Procedures

- Households receiving SNAP or Temporary Assistance to Needy Families (TANF) benefits as identified by Oregon Department of Education (ODE), will be automatically eligible for free meals ~~[,] [and] [milk]~~ ~~[afterschool snacks]~~ for the students listed on the official document. Districts must access this document at least three times per year.
- Households that submit a confidential application will be notified of their student's eligibility for free or reduced price meals ~~[or free milk]~~. Households that are denied free or reduced price benefits will be notified in writing using the ODE template letter distributed to the district annually.
- On a case-by-case basis, when a student is known to be eligible for free or reduced price meal ~~[or free milk]~~ benefits and the household fails to submit a confidential application, the superintendent or designee may complete an application for the student documenting how he/she knows the household income qualifies the student for free or reduced price meal benefits. Parents of a student approved for free or reduced price benefits, when application is made for the student by a school official, will be notified of the decision and given the opportunity to decline benefits.
- Students who do not qualify for free or reduced price meals ~~[or free milk]~~ are eligible to participate in the ~~[SMP,]~~ National School Lunch Program (NSLP) ~~[and School Breakfast Program (SBP)]~~ and will be charged "paid" ~~meal[,]~~ ~~[and] [snack] [milk]~~ prices set by the district. "Paid" category students will be treated equally to students receiving free or reduced price benefits in every aspect of the district's NSLP ~~[,]~~ ~~[and] [SMP]~~ ~~[SBP]~~.
- The district has established a fair hearing process under which a household can appeal a decision with respect to the household's application for benefits or any subsequent reduction or termination of benefits.
- In the event of major employers contemplating large layoffs in the attendance area of the district, the district will provide confidential applications and eligibility criteria for free and reduced price meals ~~[or free milk]~~ to the employer for distribution to affected employees.

## Financial Management of the Nonprofit School Food Service

- The district will maintain a nonprofit school nutrition and food service operation.
- Revenues earned by the school nutrition and food services will be used only for the operation or improvement of NSLP ~~[,]~~ ~~[and] [SMP] [SBP]~~.
- Lunch and breakfast meals served to teachers, administrators, custodians and other adults not directly involved with the operation of the district's nutrition and food services will be priced to cover all direct and indirect cost of preparing and serving the meal.<sup>3</sup>
- District nutrition and food services revenues will not be used to purchase land or buildings.
- The district will limit its nutrition and food services net cash resources to an amount that does not exceed three months average expenditures.
- The district will maintain effective control and accountability for, and adequately safeguard, all nutrition and food services' cash, real and personal property, equipment and other assets, and ensure they are used solely for nutrition and food services purposes.

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<sup>3</sup>For meals with portion sizes equivalent to student meals, the adult meal price will be no less than the amount of reimbursement for a free-eligible meal, plus the value of commodity foods used in the meal preparation.

7. The district will meet the requirements for allowable NSLP~~[,]~~and~~[SMP]~~[SBP]-costs as described in 2 C.F.R. 200.
8. In purchasing nutrition and food services goods or services, the district will not accept proposals or bids from any party that has developed or drafted specifications, requirements, statements of work, invitations for bids, requests for proposals, contract terms and conditions or other documents for proposals used to conduct the procurement.
9. All procurement transactions for nutrition and food services goods and services will be conducted according to state, federal and district procurement standards using the applicable cost thresholds.
10. In the operation of its nutrition and food services program, the district will purchase food products that are produced in the United States, whenever possible.
11. [The district may use facilities, equipment and personnel supported with nutrition and food services revenue to support a nonprofit nutrition program for the elderly.]

### **Civil Rights and Confidentiality Procedures**

1. The district will not discriminate against any student because of his/her eligibility for free or reduced price meals.
2. The district will not discriminate against any student or any nutrition and food services employee because of race, color, national origin, marital status, sex, sexual orientation, parental status, religion, age or disability.
3. The district will assure that all students and nutrition and food services employees are not subject to different treatment, disparate impact or a hostile environment.
4. Established district procedures will be followed for receiving and processing civil rights complaints related to applications for NSLP~~[,]~~and~~[SMP]~~[SBP]-benefits and services, and employment practices with regard to the operation of its NSLP~~[,]~~and~~[SMP]~~[SBP]. The district will forward any civil rights complaint regarding the district's nutrition and food services to ODE's civil rights coordinator within three days of receiving the complaint.
5. The district will make written or oral translations of all nutrition and food services materials available to all households who do not read or speak English.
6. The district will maintain strict confidentiality of all information on the confidential application for free and reduced price meals [or free milk], including students' eligibility for free or reduced price meals and all household information. The district's NSLP~~[,]~~and~~[SMP]~~[SBP]-operators are not required to release any information from a student's confidential application for free or reduced price meals [or free milk]. No information may be released from a student's confidential application for free or reduced price meals [or free milk] without first obtaining written permission from the student's parent or legal guardian/adult household member signing the application, except as follows:
  - a. An individual student's name and eligibility status may be released without written consent only to persons who operate or administer federal education programs; persons who operate or administer state education or state health programs at the state level; persons evaluating state, education assessment; or persons who operate or administer any other NSLP, SBP, SMP, Summer Food Service Program (SFSP), Child and Adult Care Food Program (CACFP) or the Food Stamp Program;

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

### **Nutrition and Menu Planning**

1. Meals and ~~afterschool~~ snacks served for reimbursement will meet the recommendations of the most current *Dietary Guidelines for Americans*.
2. Meals ~~and afterschool snacks~~ served for reimbursement will meet at least the minimum NSLP ~~and SBP~~ requirements for food items and quantities.
3. Meals served for reimbursement will:
  - a. Meet all calorie range requirements by grade level;
  - b. Meet the maximum standards set for saturated fat;
  - c. Meet the maximum standards set for sodium by grade level; and
  - d. Meet the requirement for zero grams of trans fats.
4. The district will use the offer versus serve option when serving NSLP lunches to senior high school students. High school students must take at least three of five different food items including one-half cup of fruit or vegetable offered in program lunches.
5. ~~The district will use the offer versus serve option when serving program breakfasts to senior high school students. High school students must take at least three of four food items, including one-half cup of fruit or vegetable offered in program breakfasts.~~
6. [The district will use the offer versus serve option when serving program lunches to students below senior high school grades. Students below high school grades will be required to take three of the five food items, including one-half cup of fruit or vegetable offered in program lunches.]
7. ~~The district will use the offer versus serve option when serving program breakfasts to students below senior high school grades. Students below high school grades will be required to take three of the four food items, including one-half cup of fruit offered in program breakfasts.~~
8. A copy of the Board minutes adopting the offer versus serve policy for students below high school grades for program lunches and/or for all students in the district for program breakfasts, as applicable, will be made available upon request.<sup>4</sup>

### **Use and Control of Commodity Foods**

9. The district will accept and use commodity foods in as large a quantity as may be efficiently utilized in the reimbursable lunch ~~and breakfast~~ program.
10. The district will maintain necessary safeguards to prevent theft or spoilage of commodity foods.

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<sup>4</sup>Modify the language of this item to be reflective of the options the district has selected for offer versus serve.

11. The value of commodity foods used for any food production other than NSLP, SBP or **afterschool** snacks shall be replaced in the food service inventory.

### **Accuracy of Reimbursement Claims**

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

### **Food Safety and Sanitation Inspections**

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

### **General USDA NSLP/SBP/SMP Requirements**

1. The district will ensure that no student is denied a meal as a disciplinary action.
2. Breakfast will be served in the morning hours, at or near the beginning of the student’s school day.
3. Lunch will be served between the hours of 10 a.m. and 2 p.m.
4. The district will provide substitute foods for students who are determined by a licensed physician to be legally disabled and whose disability restricts their diet. Substitutions will be provided only when a medical statement from the licensed physician is on file at the school. The medical statement must state the nature of the child’s disability and how the disability affects the child’s nutrition needs, and it must provide a medical prescription for substitute foods or texture modification. The district will not charge more than the price of the school meal, as determined by the child’s eligibility status, for substitute meals or foods.
5. The district will control the sale of competitive foods.

6. The district will ensure that potable [drinking] water will be available to students, free of charge for consumption in the place where meals are served during meal service.<sup>5</sup>
7. The district ~~{allows no meal charges}~~ will notify all households of its meal charge requirements early in the school year. ~~{The district's meal charging requirements are as follows:~~

A charge account for students paying full or reduced price for meals may be established with the district. Students may charge no more than ~~{two}~~ meals. Any student failing to keep his/her account current as required by the district shall not be allowed to charge the price of further meals until the account has been paid in full ~~{but will be allowed to purchase a meal if the student pays for the meal when it is received}~~. At least one written warning shall be provided to a student and his/her parent prior to denying meals for exceeding the district's charge limit. ~~Payment is due to the [district office] on the [ ] of each month.~~ Students or parents of students may prepay meal costs.<sup>6</sup>
8. The sale of foods in competition with the district's lunch (NSLP) or breakfast (SBP) programs will be allowed in dining sites during lunch and breakfast periods with Board approval only when all income from the food sales accrues to the benefit of the district's nutrition and food services or accrues to a school or student organization approved by the Board. A copy of the Board minutes approving and defining competitive food sales will be made available upon request.

### Record Keeping

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

1. All currently approved and denied confidential application for free and reduced price meals ~~{, free milk}~~ and all current direct certification documents;
2. Financial records that account for all revenues and expenditures of the district's nonprofit nutrition and food services programs;
3. Records (i.e., recipes, ingredient lists and nutrition fact labels or product specifications) that document the compliance with nutrition standards for all competitive foods available for sale to students at a school campus;
4. Documents of participation data (i.e. meal counts) from each school in the district to support claims for reimbursement;
5. Production and menu records;
6. Records to document compliance with Paid Lunch Equity; and
7. Records to document compliance with Revenue from Nonprogram Foods.

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<sup>5</sup>New requirement under Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. 1751 §§ 203.

<sup>6</sup>[Language is suggested only. ]Revise to reflect district's meal charging requirements and ensure information is communicated to students and parents.

# Oregon School Boards Association Selected Sample Policy

Code: **GBC**  
Adopted: **Recommend Approval**

## Staff Ethics

### I. Conflict of Interest

No district employee will use his/her district position to obtain personal financial benefit or avoidance of financial detriment or financial gain or avoidance of financial detriment for relatives, household members or for any business with which the employee, household member or relative is associated.

This prohibition does not apply to any part of an official compensation package, honorarium allowed by ORS 244.042, reimbursement of expenses, or unsolicited awards of professional achievement. Further, this prohibition does not apply to gifts from one without a legislative or administrative interest. Nor does it apply if the gift is under the \$50 gift limit for one who has a legislative or administrative interest in any matter subject to the decision or vote of the district employee.

District employees will not engage in, or have a financial interest in, any activity that raises a reasonable question of conflict of interest with their duties and responsibilities as staff members. This means that:

1. Employees will not use their position to obtain financial gain or avoidance of financial detriment from students, parents or staff;
2. Any device, publication or any other item developed during the employee's paid time shall be district property;
3. Employees will not further personal gain through the use of confidential information gained in the course of or by reason of position or activities in any way;
4. No district employee may serve as a Board or budget committee member in the district~~[.];~~ ~~} [A district or charter school substitute bus driver in a district with an average daily membership of 50 or less may serve as a Board member.;~~]
5. An employee will not perform any duties related to an outside job during his/her regular working hours or during the additional time that he/she needs to fulfill the position's responsibilities; nor will an employee use any district facilities, equipment or materials in performing outside work;
6. If an employee authorizes a public contract, the employee may not have a direct beneficial financial interest in that public contract for two years after the date the contract was authorized.

If an employee has a potential or actual conflict of interest, the employee must notify his/her supervisor in writing of the nature of the conflict and request that the supervisor dispose of the matter giving rise to the conflict.

In order to avoid both potential and actual conflicts of interests, district employees must abide by the following rules when an employee's relative or member of the household is seeking and/or holds a position with the district:

1. A district employee may not appoint, employ, promote, discharge, fire, or demote or advocate for such an employment decision for a relative or a member of the household, unless he/she complies with the conflict of interest requirements of ORS Chapter 244. This rule does not apply to employment decisions regarding unpaid volunteer position, unless it is a Board-related position;
2. A district employee may not participate as a public official in any interview, discussion, or debate regarding the appointment, employment, promotion, discharge, firing, or demotion of a relative or a member of the household. An employee may still serve as a reference, provide a recommendation, or perform other acts that are part of the normal job functions of the employee;
3. More than one member of an employee's family may be hired as a regular district employee. In accordance with Oregon law, however, the district may refuse to hire individuals, or may transfer current employees, in situations where an appointment would place one family member in a position of exercising supervisory, appointment or grievance adjustment authority over another member of the same family. [Employees who are members of the same family may not be assigned to work in the same building except by the superintendent's approval.]

In the *conflict of interest context*:

a. "Member of household" means any person who resides with the employee, and

"Relative" means: 1. The employee's spouse<sup>1</sup>, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the employee; or 2. The spouse of the employee's parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the spouse of the employee. Relative also includes any individual for whom the employee has a legal support obligation, whose employment provides benefits<sup>2</sup> to the employee, or who receives any benefit from the employee's public employment.

## II. Gifts

District employees must comply with the following rules involving gifts:

Employees are public officials and therefore will not solicit or accept a gift or gifts with an aggregate value in excess of \$50 from any single source in a calendar year that has a legislative or administrative interest in any matter subject to the decision or vote of the district employee. All gift-related provisions apply to the employee, their relatives, and members of their household. The \$50 gift limit applies separately to the employee, and to the employee's relatives or members of household, meaning that the employee and each member of their household and relative can accept up to \$50 each from the same source/gift giver. 4. "Gift" means something of economic value given to an employee without valuable consideration of equivalent value, which is not extended to others who are not public officials on the same terms and conditions.

2. "Relative" means: a. The employee's spouse<sup>3</sup>, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law of the employee; or b. The spouse of the employee's parent, step-parent, child,

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<sup>1</sup>The term spouse includes domestic partner.

<sup>2</sup>Examples of benefits may include, but not be limited to, elements of an official compensation package including benefits such as insurance, tuition or retirement allotments.

<sup>3</sup>Ibid. p. 2

sibling, step-sibling, son-in-law or daughter-in-law of the spouse of the employee. Relative also includes any individual for whom the employee has a legal support obligation, whose employment provides benefits<sup>4</sup> to the employee, or who receives any benefit from the employee's public employment.

3.—“Member of the household” means any person who resides with the employee.

### **Determining the Source of Gifts**

Employees should not accept gifts in any amount without obtaining information from the gift giver as to who is the source of the gift. It is the employee's personal responsibility to ensure that no single source provides gifts exceeding an aggregate value of \$50 in a calendar year, if the source has a legislative or administrative interest in any matter subject to the decision or vote of the district employee. If the giver does not have a legislative or administrative interest, the ethics rules on gifts do not apply and the employee need not keep track of it, although they are advised to do so anyway in case of a later dispute.

### **Determining Legislative and Administrative Interest**

A “legislative or administrative interest” means an economic interest, distinct from that of the general public, in any action subject to the official decision of an employee.

A decision means an act that commits the district to a particular course of action within the employee's scope of authority and that is connected to the source of the gift's economic interest. A decision is not a recommendation or work performed in an advisory capacity. If a supervisor delegates the decision to a subordinate but retains responsibility as the final decision maker, both the subordinate and supervisor's actions would be considered a “decision.”

### **Determining the Value of Gifts**

The fair market value of the merchandise, goods, or services received will be used to determine benefit or value.

“Fair market value” is the dollar amount goods or services would bring if offered for sale by a person who desired, but was not obligated, to sell and purchased by one who is willing, but not obligated, to buy. Any portion of the price that was donated to charity, however, does not count toward the fair market value of the gift if the employee does not claim the charitable contribution on personal tax returns. Below are acceptable ways to calculate the fair market value of a gift:

1. In calculating the per person cost at receptions or meals the payor of the employee's admission or meal will include all costs other than any amount donated to a charity.

For example, a person with a legislative or administrative interest buys a table for a charitable dinner at \$100 per person. If the cost of the meal was \$25 and the amount donated to charity was \$75, the benefit conferred on the employee is \$25. This example requires that the employee does not claim the charitable contribution on personal tax returns.

2. For receptions and meals with multiple attendees, but with no price established to attend, the source of the employee's meal or reception will use reasonable methods to determine the per person value or benefit conferred. The following examples are deemed reasonable methods of calculating value or benefit conferred:

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<sup>4</sup>Ibid. p. 2

- a. The source divides the amount spent on food, beverage and other costs (other than charitable contributions) by the number of persons whom the payor reasonably expects to attend the reception or dinner;
  - b. The source divides the amount spent on food, beverage and other costs (other than charitable contributions) by the number of persons who actually attend the reception or dinner; or
  - c. The source calculates the actual amount spent on the employee.
3. Upon request by the employee, the source will give notice of the value of the merchandise, goods, or services received.
  4. Attendance at receptions where the food or beverage is provided as an incidental part of the reception is permitted without regard to the fair market value of the food and beverage provided.

### **Value of Unsolicited Tokens or Awards: Resale Value**

Employees may accept unsolicited tokens or awards that are engraved or are otherwise personalized items. Such items are deemed to have a resale value under \$25 (even if the personalized item cost the source more than \$50), unless the personalized item is made from gold or some other valuable material that would have value over \$25 as a raw material.

### **Entertainment**

Employees may not solicit or accept any gifts of entertainment over \$50 in value from any single source in a calendar year that has a legislative or administrative interest in any matter subject to the decision of the employee unless:

5. The entertainment is incidental to the main purpose of another event (i.e., a band playing at a reception). Entertainment that involves personal participation is not incidental to another event (such as a golf tournament at a conference); or
6. The employee is acting in their official capacity for a ceremonial purpose.

Entertainment is ceremonial when an employee appears at an entertainment event for a “ceremonial purpose” at the invitation of the source of the entertainment who requests the presence of the employee at a special occasion associated with the entertainment. Examples of an appearance by an employee at an entertainment event for a ceremonial purpose include: throwing the first pitch at a baseball game, appearing in a parade and ribbon cutting for an opening ceremony.

## Exceptions

The following are exceptions to the ethics rules on gifts that apply to employees:

7. Gifts from “relatives” and “members of the household” to the employee are permitted in an unlimited amount; they are not considered gifts under the ethics rules;
8. Informational or program material, publications, or subscriptions related to the recipient’s performance of official duties;
9. Food, lodging, and travel generally count toward the \$50 aggregate amount per year from a single source with a legislative or administrative interest, with the following exceptions:
  - a. Organized Planned Events. Employees are permitted to accept payment for travel conducted in the employee’s official capacity, for certain limited purposes:
    - (1) Reasonable expenses (i.e., food, lodging, travel, fees) for attendance at a convention, fact-finding mission or trip, or other meeting do not count toward the \$50 aggregate amount IF:
      - (a) The employee is scheduled to deliver a speech, make a presentation, participate on a panel, or represent the district; AND
        - i) The giver is a unit of a:
          - a) Federal, state, or local government;
          - b) An Oregon or federally recognized Native American Tribe; OR
          - c) Nonprofit corporation.
        - (b) The employee is representing the district:
          - i) On an officially sanctioned trade-promotion or fact-finding mission; OR
          - ii) Officially designated negotiations or economic development activities where receipt of the expenses is approved in advance by the superintendent.
      - (2) The purpose of this exception is to allow employees to attend organized, planned events and engage with the members of organizations by speaking or answering questions, participating in panel discussions or otherwise formally discussing matters in their official capacity. This exception to the gift definition does not authorize private meals where the participants engage in discussion.
10. Food or beverage, consumed at a reception, meal, or meeting IF held by an organization and IF the employee is representing the district.

“Reception” means a social gathering. Receptions are often held for the purpose of extending a ceremonial or formal welcome and may include private or public meetings during which guests are honored or welcomed. Food and beverages are often provided, but not as a plated, sit-down meal;
11. Food or beverage consumed by employee acting in an official capacity in the course of financial transactions between the public body and another entity described in ORS 244.020(6)(b)(I)(i);

12. Waiver or discount of registration expenses or materials provided to employee at a continuing education event that the employee may attend to satisfy a professional licensing requirement;
13. A gift received by the employee as part of the usual or customary practice of the employee's private business, employment or position as a volunteer that bears no relationship to the employee's district employment;
14. Reasonable expenses paid to employee for accompanying students on an educational trip.

### **Honoraria**

An employee may not solicit or receive, whether directly or indirectly, honoraria for the employee or any relative or member of the household of the employee if the honoraria are solicited or received in connection with the official duties of the employee.

The honoraria rules do not prohibit the solicitation or receipt of an honorarium or a certificate, plaque, commemorative token, or other item with a value of \$50 or less; or the solicitation or receipt of an honorarium for services performed in relation to the private profession, occupation, avocation, or expertise of the employee.

END OF POLICY

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### **Legal Reference(s):**

[ORS 244.010](#) to -244.400  
[ORS 332.016](#)  
[ORS 659A.309](#)

[OAR 199-005-00030001](#) to -199-020-0020  
[OAR 584-020-0040](#)

OR. ETHICS COMM'N, OR. GOV'T ETHICS LAW, A GUIDE FOR PUBLIC OFFICIALS.

HR6/12/14/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **GCDA/GDDA**  
Adopted: **Recommend Approval**

## **Criminal Records Checks/Fingerprinting\*** (Version 1)

In a continuing effort to further ensure the safety and welfare of students and staff, the district shall require criminal records checks and fingerprinting of all newly hired full-time and part-time employees. Others having direct, unsupervised contact with students shall also have criminal records checks and fingerprinting, as required by law.

“Direct, unsupervised contact” means contact with students that provides the person opportunity and probability for personal communication or touch.

In addition to the newly hired employees, such checks shall be required of the following:

1. All district contractors and/or their employees, whether employed part-time or full-time;
2. All contractors and/or their employees who provide early childhood special education or early intervention services in accordance with rules established by the Employment Department;
3. Any community college faculty member providing instruction at the site of an early childhood education program or at a school site as part of an early childhood program;
4. An individual who is an employee of a public charter school.

An individual who has failed to disclose the presence of criminal convictions that would not otherwise prevent his/her employment with the district as provided by law [may] [will not] be employed or contracted with, by the district. The district’s use of criminal history must be relevant to the specific requirements of the position, services or employment.

The district ~~[shall]~~ ~~[shall not]~~ **may not** begin the employment of an individual or terms of a district contractor ~~[on a probationary basis pending]~~ ~~[before]~~ the return and disposition of criminal records checks and/or fingerprinting. ~~{The service of a volunteer [may][will not] may not begin [on a probationary basis pending][before] the return and disposition of a criminal records check.}~~

The superintendent shall develop administrative regulations as necessary to meet the requirements of law.

END OF POLICY

**Legal Reference(s):**

[ORS 181.555](#)  
[ORS 326.603](#)  
[ORS 326.607](#)  
[ORS 336.631](#)

[ORS 338.115](#)  
[ORS 342.143](#)  
[ORS 342.223](#)

[OAR 414-061-0010](#)  
[OAR 581-021-0500](#)  
[OAR 581-022-1730](#)  
[OAR 584-036-0062](#)

Title VII of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000e, et. seq. (2012).

R6/25/15 1/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **GCDA/GDDA**  
Adopted: **Not Recommended; Rec.**  
**Version 1**

## **Criminal Records Checks/Fingerprinting\*** (Version 2)

All newly hired employees shall be required to submit to a nationwide criminal records check and fingerprinting. Individuals contracting with the district and their employees, who have direct, unsupervised contact with students, shall also be required to submit to a nationwide criminal records check and fingerprinting.

The Board may require an Oregon criminal history check for other individuals considered for volunteer service for the district who have direct, unsupervised contact with students.

The district [shall] [shall not] begin the employment of an individual or terms of a district contractor [on a probationary basis pending] [before] the return and disposition of such criminal records check and/or fingerprinting. [The service of a volunteer [may] [will not] begin [on a probationary basis pending] [before] the return and disposition of a criminal records check.]

An individual who has failed to disclose the presence of criminal convictions that would not otherwise prevent his/her employment with the district as provided by law [may] [will not] be employed or contracted with, by the district. The district's use of criminal history must be relevant to the specific requirements of the position, services or employment.

Criminal records checks and fingerprinting fees as required by the Teacher Standards and Practices Commission shall be paid by the individual. Fees as required for all other individuals subject to such checks and/or fingerprinting shall be paid by the [individual] [district].

Employees not requiring licensure may request that the required fees be withheld from the employee's paycheck. Such fees may be deducted only upon the request of the individual.

The superintendent is directed to develop administrative regulations to meet the requirements of applicable Oregon Revised Statutes and Oregon Administrative Rules.

END OF POLICY

### **Legal Reference(s):**

[ORS 181.525](#)  
[ORS 181.555](#)  
[ORS 183.413 to -183.470](#)  
[ORS 326.603](#)  
[ORS 326.607](#)

[ORS 336.631](#)  
[ORS 338.115](#)  
[ORS 342.143](#)  
[ORS 342.223](#)

[OAR 414-061-0010](#)  
[OAR 581-021-0500](#)  
[OAR 581-022-1730](#)  
[OAR 584-036-0062](#)

Title VII of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000e, et. seq. (2012).  
R6/25/15 1/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **IGAEB**  
Adopted: **Not Recommended; Rec.**  
**Version 2**

## **Drug, Alcohol and Tobacco Prevention, Health Education\*\*** (Version 1)

Students have a right to attend school in an environment conducive to learning. Since student drug, alcohol and tobacco use is illegal and harmful and interferes with both effective learning and the healthy development of students, the school has a fundamental legal and ethical obligation to prevent unlawful drug, alcohol and tobacco use and to maintain a drug-free educational environment.

After consulting with parents, teachers, school administrators, local community agencies and persons from the drug, alcohol or health service community who are knowledgeable of the latest research information, the Board will adopt a written plan for a drug, alcohol and tobacco prevention and intervention program.

### **Drug Prevention Program**

The district's drug, alcohol and tobacco curriculum will be age-appropriate, reviewed annually and updated as necessary to reflect current research and Oregon's Health Education Academic Content Standards.

Drug, alcohol and tobacco prevention instruction will be integrated in the district's health education courses for grades K-12. Students not enrolled in health education shall receive such instruction through other designated courses. At least annually, all senior high school students, grades 9-12, shall receive such instruction about drug and alcohol prevention. Instruction shall minimally meet the requirements set forth in Oregon Administrative Rules.

The district will include information regarding the district's intervention and referral procedures, including those for drug-related medical emergencies in student/parent and staff handbooks.

Intervention is defined as the identification and referral of students whose behavior is interfering with their potential success socially, emotionally, physiologically, and/or legally as a result of prohibited drug, alcohol and/or tobacco use.

Any staff member who has reason to suspect a student is in possession of, or under the influence of unlawful drugs, alcohol, other intoxicants or tobacco on district property, on a school bus or while participating in any district-sponsored activity, whether on district property or at sites off district property, will escort the student to the office or designated area and will report the information to the principal or his/her designated representative.

[The principal or designee will:

1. Call the police law enforcement if deemed appropriate;
2. Call the parents for a meeting;
3. Discuss the incident with student, parents if available and police if contacted;

4. Impose the penalty for violations using due process procedures;
5. Tell parents about resources which offer treatment or assistance for young people suffering from drug-, alcohol- or tobacco-related problems.]

Students possessing, using and/or selling unlawful drugs, including drug paraphernalia, alcohol and tobacco on district property, in district vehicles, at district-sponsored activities on or off district grounds shall be subject to discipline up to and including expulsion. When considering disciplinary action for a child with disabilities, the district must follow the requirements of Board policy JGDA/JGEA – Discipline of Students with Disabilities including those involving functional behavioral assessment, change or placement, manifestation determination and an interim alternative educational setting. Students may also be referred to law enforcement officials.

[Each year the administration will meet with law enforcement officials to discuss:

6. Who the school should call for suspected violations of the law or other needs;
7. How school representatives should handle evidence of a suspected offense (i.e., school staff should not taste a substance to ascertain whether or not it is a drug). What about fingerprints? Paraphernalia?
8. What questioning procedures may take place on district property;
9. Other needs of the district and law enforcement to avoid conflicts or confusion before a substance-related incident occurs.]

In general, drug-related medical emergencies will be handled like a serious accident or illness. Immediate notification of the community emergency care unit is required. Trained staff members will assist the student in any way possible. Parents shall be contacted immediately. A staff member shall be designated to accompany the student to the hospital or emergency medical facility. Procedures to be taken, including those for students participating in district-sponsored activities off district grounds, shall be included in the district's comprehensive first aid/emergency plan.

The business manager/district will actively seek funds from outside sources either independently or through coordinated efforts with other districts, community agencies or the education service district for drug-free schools grants.

Funds needed to support district activities related to unlawful drug, alcohol and tobacco prevention will be identified by source, particularly the 1986 Drug Free Schools Act, moneys or other grants received from federal, state or local sources.

A planned staff development program that includes current drug, alcohol and tobacco prevention education, an explanation of the district's plan and staff responsibilities within that plan will be developed by the superintendent. The input of staff, parents and the community is encouraged to ensure a staff development program that best meets the needs of district students.

The district will develop a public information plan for students, staff and parents.

The district's Drug, Alcohol and Tobacco Prevention, Health Education policy, related **board** policies, rules and procedures will be reviewed annually and updated as needed.

END OF POLICY

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**Legal Reference(s):**

<a href="#">ORS 163.575</a>	<a href="#">OAR 581-015-2055</a>	<a href="#">OAR 581-015-2420</a>
<a href="#">ORS 336.067</a>	<a href="#">OAR 581-015-2060</a>	<a href="#">OAR 581-015-2425</a>
<a href="#">ORS 336.222</a>	<a href="#">OAR 581-015-2070</a>	<a href="#">OAR 581-015-2430</a>
<a href="#">ORS 339.133 to 137</a>	<a href="#">OAR 581-015-2075</a>	<a href="#">OAR 581-015-2435</a>
<a href="#">ORS 339.873</a>	<a href="#">OAR 581-015-2205</a>	<a href="#">OAR 581-015-2440</a>
<a href="#">ORS Chapter 475</a>	<a href="#">OAR 581-015-2220</a>	<a href="#">OAR 581-015-2600</a>
<a href="#">ORS 809.260</a>	<a href="#">OAR 581-015-2225</a>	<a href="#">OAR 581-015-2605</a>
	<a href="#">OAR 581-015-2230</a>	<a href="#">OAR 581-021-0050</a>
<a href="#">OAR 581-011-0052</a>	<a href="#">OAR 581-015-2235</a>	<a href="#">OAR 581-021-0055</a>
<a href="#">OAR 581-015-2000</a>	<a href="#">OAR 581-015-2240</a>	<a href="#">OAR 581-022-0413</a>
<a href="#">OAR 581-015-2040</a>	<a href="#">OAR 581-015-2325</a>	<a href="#">OAR 581-022-1210</a>
<a href="#">OAR 581-015-2045</a>	<a href="#">OAR 581-015-2410</a>	
<a href="#">OAR 581-015-2050</a>	<a href="#">OAR 581-015-2415</a>	

Drug-Free Workplace Act of 1988, 41 U.S.C. §§ 701-707 (2006); General Principles Relating to Suspension and Debarment Actions, 34 C.F.R. §§ 85.600 - 85.645 (2006).

Controlled Substances Act, 21 U.S.C. § 812; Schedules of Controlled Substances, 21 C.F.R. §§ 1308.11 - 1308.15 (2006).

Safe and Drug-Free Schools and Communities Act, 20 U.S.C. §§ 7101-7117 (2006).

34 C.F.R. §§ 300.108.

R12/31/071/14/16 | **MWPH**

# Oregon School Boards Association Selected Sample Policy

Code: **IGAEB**  
Adopted: **Recommend Approval**

## **Drug, Alcohol and Tobacco Prevention, Health Education\*\* (Version 2)**

The district will not tolerate the possession, selling or use of unlawful and harmful drugs (illicit drugs, nontherapeutic use of prescribed drugs, misuse of solvents and other dangerous substances) alcohol or tobacco in the schools, on district grounds or during district sponsored activities including athletic events, dances, field trips, etc.

Given the extensive use and the formal and informal promotion of drug, alcohol and tobacco use in society, the school has an obligation to provide education that emphasizes prevention, to describe intervention and referral procedures, and to outline consequences. The district will provide planned staff development and public information programs. The district will access the drug-free schools moneys and other moneys available for drug-free schools efforts.

After consulting with staff, parents and students, through such groups as community agencies and representatives from drug, alcohol or health service agencies, student councils, MADD, ministerial association, chamber of commerce, local school committee and the county youth services team, the Board will adopt a written plan for a drug, alcohol and tobacco prevention and intervention program.

### **Drug Prevention Program**

The district shall adopt the “Here’s Looking at you 2000” curriculum for grades K-6 and ~~the ODE infused~~ alcohol/drug curriculum guide. Each classroom K-8 shall receive drug, alcohol and tobacco prevention instruction as part of the health education program.

A curriculum for students 9-12 will be developed by the district’s health education committee. Instruction will be integrated in the health education curriculum and will be consistent with the State Board of Education adopted Health Education Common Curriculum Goals. For students not enrolled in health education, the district’s wellness team will develop a program of activities which reflects current research and meets the requirements of the district’s prevention and intervention program. Activities may include: workshops, conferences, clubs, assemblies and a review of the school climate.

Each year the district will review the curriculum in consultation with the district’s drug, alcohol and tobacco prevention committee and revise as necessary to reflect current research.

The district is committed to an aggressive intervention and referral program to eliminate prohibited drug, alcohol and tobacco use.

The program shall include training for staff and a compilation of information on school and community resources and procedures for responding to drug-related medical emergencies.

Parents, students and staff shall receive annually in handbooks information and detailed procedures regarding the district’s intervention/referral program.

Each year students and parents shall receive a code of conduct explaining expected behaviors and related consequences for violations of the conduct code which may include discipline up to and including expulsion. Students violating the code of conduct prohibiting [substance abuse,] possessing, selling and/or using unlawful drugs or alcohol may be subject to an assessment and, if appropriate, referred to law enforcement officials. When considering disciplinary action for a child with disabilities, the district must follow the requirements of Board policy JGDA/JGEA – Discipline of Students with Disabilities including those involving functional behavioral assessment, change or placement, manifestation determination and an interim alternative educational setting.

Each year the district will actively seek funds to support the activities identified in the district’s drug, alcohol and tobacco prevention program.

The superintendent shall provide staff development activities for all employees addressing the district’s drug, alcohol and tobacco prevention and intervention program/plan, the employee’s responsibilities within the plan and current drug, alcohol and tobacco information.

The district will develop a public information plan for students, staff and parents.

The district’s Drug, Alcohol and Tobacco Prevention, Health Education policy, related policies, rules and procedures will be reviewed annually and updated, as needed.

END OF POLICY

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**Legal Reference(s):**

- |                                     |                                  |                                  |
|-------------------------------------|----------------------------------|----------------------------------|
| <a href="#">ORS 163.575</a>         | <a href="#">OAR 581-015-2055</a> | <a href="#">OAR 581-015-2420</a> |
| <a href="#">ORS 336.067</a>         | <a href="#">OAR 581-015-2060</a> | <a href="#">OAR 581-015-2425</a> |
| <a href="#">ORS 336.222</a>         | <a href="#">OAR 581-015-2070</a> | <a href="#">OAR 581-015-2430</a> |
| <a href="#">ORS 339.133 to -137</a> | <a href="#">OAR 581-015-2075</a> | <a href="#">OAR 581-015-2435</a> |
| <a href="#">ORS 339.873</a>         | <a href="#">OAR 581-015-2205</a> | <a href="#">OAR 581-015-2440</a> |
| <a href="#">ORS Chapter 475</a>     | <a href="#">OAR 581-015-2220</a> | <a href="#">OAR 581-015-2600</a> |
| <a href="#">ORS 809.260</a>         | <a href="#">OAR 581-015-2225</a> | <a href="#">OAR 581-015-2605</a> |
|                                     | <a href="#">OAR 581-015-2230</a> | <a href="#">OAR 581-021-0050</a> |
| <a href="#">OAR 581-011-0052</a>    | <a href="#">OAR 581-015-2235</a> | <a href="#">OAR 581-021-0055</a> |
| <a href="#">OAR 581-015-2000</a>    | <a href="#">OAR 581-015-2240</a> | <a href="#">OAR 581-022-0413</a> |
| <a href="#">OAR 581-015-2040</a>    | <a href="#">OAR 581-015-2325</a> | <a href="#">OAR 581-022-1210</a> |
| <a href="#">OAR 581-015-2045</a>    | <a href="#">OAR 581-015-2410</a> |                                  |
| <a href="#">OAR 581-015-2050</a>    | <a href="#">OAR 581-015-2415</a> |                                  |

Drug-Free Workplace Act of 1988, 41 U.S.C. §§ 701-707 (2006); General Principles Relating to Suspension and Debarment Actions, 34 C.F.R. §§ 85.600 - 85.645 (2006).

Controlled Substances Act, 21 U.S.C. § 812; Schedules of Controlled Substances, 21 C.F.R. §§ 1308.11 - 1308.15 (2006).

Safe and Drug-Free Schools and Communities Act, 20 U.S.C. §§ 7101-7117 (2006).

34 C.F.R. §§ 300.108.

R12/31/07 | JW

# Oregon School Boards Association Selected Sample Policy

Code: **IGAEB**  
Adopted: **Not Recommended: Rec. V.2**

## **Drug, Alcohol and Tobacco Prevention, Health Education\*\* (Version 3)**

While drug, alcohol and tobacco use is dangerous in all segments of American society, it poses a special risk to young people by denying the opportunity to develop physically and psychologically. To this end, the district is committed to a drug-free school and intends to send an absolute and clear message that drug, alcohol and tobacco use as prohibited by state and federal law is illegal and will not be allowed in the district or during school-sponsored events and activities.

The superintendent will develop a written plan for a drug, alcohol and tobacco prevention and intervention program to include:

1. District philosophy;
2. Prevention education;
3. Intervention/Referral and drug-related medical emergency procedures;
4. Consequences and law enforcement relations;
5. Access and use of federal moneys;
6. Staff development;
7. Public relations program to be adopted and reviewed annually by the Board after consulting with a drug, alcohol and tobacco committee comprised of a parent and teacher from each school, one administrator, one community representative and a health care professional.

### **Prevention Program**

The district's drug, alcohol and tobacco prevention and intervention program will be approved by the Board, after consultation with parents, teachers, administrators, local community agencies and persons from the drug, alcohol or health service community who are knowledgeable of the latest research.

The goal of the district's prevention and intervention program is to prevent unlawful drug, alcohol and tobacco use and shall include the following:

### **Curriculum**

The curriculum will:

8. Be developmentally appropriate for each grade level;
9. Be consistent with the health education common curriculum goals;

10. Reflect community values and attitudes;
11. Be decided after consulting with parents, teachers, administrators, local community agencies and persons from the drug, alcohol and health service community;
12. Be reviewed annually and updated as needed to reflect current research.

### **Instructional Requirements - Students**

Instruction will:

13. Be provided to all students each year;
14. Be included in the health education curriculum;
15. Be integrated in other courses taken for high school students not taking health education.

### **Instructional Requirements - Activities**

Instructional activities shall include basic information:

1. On the effects of unlawful drug, alcohol and tobacco use;
2. On the laws relating to the use, especially by minors, of unlawful drugs, alcohol and tobacco;
3. On the availability of school and community resources.

### **Developing and Reinforcing Skills**

Skills will be developed and reinforced to help students:

1. Understand and manage peer pressure;
2. Understand the consequences of using unlawful drugs, alcohol or tobacco;
3. Make informed and responsible decisions;
4. Adopt positive attitudes towards health and wellness.

Detailed general and emergency intervention and referral procedures including those for drug-related medical emergencies shall be issued to all staff members annually. The intervention and referral process will be published each year in the student/parent handbook.

Student [substance abuse,] possession or use of tobacco, alcohol or unlawful drugs, including drug paraphernalia [or any substance purported to be an unlawful drug], on or near school grounds or while participating in school-sponsored activities is prohibited and will result in disciplinary action up to and including expulsion and, if appropriate, referral to law enforcement officials. When considering

disciplinary action for a child with disabilities, the district must follow the requirements of Board policy JGDA/JGEA – Discipline of Students with Disabilities including those involving functional behavioral assessment, change or placement, manifestation determination and an interim alternative educational setting.

The administration will attempt to notify parents prior to any police action at school. Exceptions to this would occur only when such notification is contrary to established legal procedures or when immediate action is required to ensure student welfare.

The district will make application for the 1986 Drug Free School Act moneys. When possible, application for other grants that are available for drug-free schools will be made.

The superintendent will plan each year at least one drug, alcohol and tobacco prevention in-service for all staff. The input of the staff will be encouraged as an integral part of the staff development planning process.

The district will develop a public information plan for students, staff and parents.

The district’s Drug, Alcohol and Tobacco Prevention, Health Education policy, related policies, rules and procedures will be reviewed annually and updated as needed.

END OF POLICY

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**Legal Reference(s):**

<a href="#">ORS 163.575</a>	<a href="#">OAR 581-015-2055</a>	<a href="#">OAR 581-015-2420</a>
<a href="#">ORS 336.067</a>	<a href="#">OAR 581-015-2060</a>	<a href="#">OAR 581-015-2425</a>
<a href="#">ORS 336.222</a>	<a href="#">OAR 581-015-2070</a>	<a href="#">OAR 581-015-2430</a>
<a href="#">ORS 339.133-137</a>	<a href="#">OAR 581-015-2075</a>	<a href="#">OAR 581-015-2435</a>
<a href="#">ORS 339.873</a>	<a href="#">OAR 581-015-2205</a>	<a href="#">OAR 581-015-2440</a>
<a href="#">ORS Chapter 475</a>	<a href="#">OAR 581-015-2220</a>	<a href="#">OAR 581-015-2600</a>
<a href="#">ORS 809.260</a>	<a href="#">OAR 581-015-2225</a>	<a href="#">OAR 581-015-2605</a>
	<a href="#">OAR 581-015-2230</a>	<a href="#">OAR 581-021-0050</a>
<a href="#">OAR 581-011-0052</a>	<a href="#">OAR 581-015-2235</a>	<a href="#">OAR 581-021-0055</a>
<a href="#">OAR 581-015-2000</a>	<a href="#">OAR 581-015-2240</a>	<a href="#">OAR 581-022-0413</a>
<a href="#">OAR 581-015-2040</a>	<a href="#">OAR 581-015-2325</a>	<a href="#">OAR 581-022-1210</a>
<a href="#">OAR 581-015-2045</a>	<a href="#">OAR 581-015-2410</a>	
<a href="#">OAR 581-015-2050</a>	<a href="#">OAR 581-015-2415</a>	

Drug-Free Workplace Act of 1988, 41 U.S.C. §§ 701-707 (2006); General Principles Relating to Suspension and Debarment Actions, 34 C.F.R. §§ 85.600 - 85.645 (2006).

Controlled Substances Act, 21 U.S.C. § 812; Schedules of Controlled Substances, 21 C.F.R. §§ 1308.11 - 1308.15 (2006).

Safe and Drug-Free Schools and Communities Act, 20 U.S.C. §§ 7101-7117 (2006).

34 C.F.R. §§ 300.108.

R12/31/07 | JW

# Oregon School Boards Association Selected Sample Policy

Code: **IGBAF-AR**  
Adopted: **Recommended Approval**

## Special Education - Individualized Education Program (IEP)\*\*

### 1. General IEP Information

- a. The district ensures that an IEP is in effect for each eligible student:
  - (1) Before special education and related services are provided to a student;
  - (2) At the beginning of each school year for each student with a disability for whom the district is responsible; and
  - (3) Before the district implements all the special education and related services, including program modifications, supports and/or supplementary aids and services, as identified on the IEP.
- b. The district uses:
  - (1) The Oregon standard IEP; or
  - (2) An IEP form that has been approved by the Oregon Department of Education.
- c. The district develops and implements all provisions of the IEP as soon as possible following the IEP meeting.
- d. The IEP will be accessible to each of the student's regular education teacher(s), the student's special education teacher(s) and the student's related services provider(s) and other service provider(s).
- e. The district takes steps to ensure that parent(s) are present at each IEP meeting or have the opportunity to participate through other means.
- f. The district ensures that each teacher and service provider is informed of:
  - (1) Their specific responsibilities for implementing the IEP specific accommodations, modifications and/or supports that must be provided for, or on behalf of the student; and
  - (2) Their responsibility to fully implement the IEP including any amendments the district and parents agreed to make between annual reviews.

The district takes whatever action is necessary to ensure that parents understand the proceedings of the IEP team meeting, including arranging for an interpreter for parents with deafness or whose native language is other than English.

- g. The district provides a copy of the IEP to the parents at no cost.

## 2. IEP Meetings

- a. The district conducts IEP meetings within 30 calendar days of the determination that the student is eligible for special education and related services.
- b. The district convenes IEP meetings for each eligible student periodically, but not less than once per year.
- c. At IEP meetings, the team reviews and revises the IEP to address any lack of expected progress toward annual goals and in the general curriculum, new evaluation data or new information from the parent(s), the student's anticipated needs, or the need to address other matters.
- d. Between annual IEP meetings, the district and the parent(s) may amend or modify the student's current IEP without convening an IEP team meeting using the procedures in the Agreement to Amend or Modify IEP subsection.
- e. When the parent(s) requests a meeting, the district will either schedule a meeting within a reasonable time or provide timely written prior notice of the district's refusal to hold a meeting.
- f. If an agency other than the district fails to provide agreed upon transition services contained in the IEP, the district convenes an IEP meeting to plan alternative strategies to meet the transition objectives and, if necessary, to revise the IEP.

## 3. IEP Team Members

- a. The district's IEP team members include the following:
  - (1) The student's parent(s);
  - (2) The student, if the purpose of the IEP meeting is to consider the student's postsecondary goals and transition services (beginning for IEPs in effect at age 16), or for younger students, when appropriate;
  - (3) At least one of the student's special education teachers or, if appropriate, at least one of the student's special education providers;
  - (4) At least one of the student's regular education teachers if the student is or may be participating in the regular education environment. If the student has more than one regular education teacher, the district will determine which teacher or teachers will participate;
  - (5) A representative of the district (who may also be another member of the team) who is qualified to provide or supervise the provision of special education and is knowledgeable about district resources. The representative of the district will have the authority to commit district resources and be able to ensure that all services identified in the IEP can be delivered;
  - (6) An individual, who may also be another member of the team, who can interpret the instructional implications of the evaluation results; and
  - (7) At the discretion of the parent or district, other persons who have knowledge or special expertise regarding the student.
- b. Student participation:
  - (1) Whenever appropriate, the student with a disability is a member of the team.

- (2) If the purpose of the IEP meeting includes consideration of postsecondary goals and transition services for the student, the district includes the student in the IEP team meeting.
  - (3) If the purpose of the IEP meeting includes consideration of postsecondary goals and transition services for the student, and the student does not attend the meeting, the district will take other steps to consider the student's preferences and interests in developing the IEP.
- c. Participation by other agencies:
- (1) With parent or adult student written consent, and where appropriate, the district invites a representative of any other agency that is likely to be responsible for providing or paying for transition services if the purpose of the IEP meeting includes the consideration of transition services (beginning at age 16, or younger if appropriate); and
  - (2) If the district refers or places a student in an education service district, state-operated program, private school or other educational program, IEP team membership includes a representative from the appropriate agencies. Participation may consist of attending the meeting, conference call or participating through other means.

#### 4. Agreement for Nonattendance and Excusal

- a. The district and the parent may consent to excuse an IEP team member from attending an IEP meeting, in whole or in part, when the meeting involves a discussion or modification of team member's area of curriculum or service. The district designates specific individuals to authorize excusal of IEP team members.
- b. If excusing an IEP team member whose area is to be discussed at an IEP meeting, the district ensures:
  - (1) The parent and the district consent in writing to the excusal;
  - (2) The team member submits written input to the parents and other members of the IEP team before the meeting; and
  - (3) The parent is informed of all information related to the excusal in the parent's native language or other mode of communication according to consent requirements.

#### 5. IEP Content

- a. In developing the IEP, the district considers the student's strengths, the parent's concerns, the results of the initial or most recent evaluation, and the academic, developmental and functional needs of the student.
- b. The district ensures that IEPs for each eligible student includes:
  - (1) A statement of the student's present levels of academic achievement and functional performance that:
    - (a) Includes a description of how the disability affects the progress and involvement in the general education curriculum;
    - (b) Describes the results of any evaluations conducted, including functional and developmental information;

- (c) Is written in language that is understood by all IEP team members, including parents;
  - (d) Is clearly linked to each annual goal statement;
  - (e) Includes a description of benchmarks or short term objectives for children with disabilities who take alternative assessments aligned to alternate achievement standards.
- (2) A statement of measurable annual goals, including academic and functional goals, or for students whose performance is measured by alternate assessments aligned to alternate achievement standard, statements of measurable goals and short term objectives. The goals and, if appropriate, objectives:
- (a) Meet the student's needs that are present because of the disability, or because of behavior that interferes with the student's ability to learn, or impedes the learning of other students;
  - (b) Enable the student to be involved in and progress in the general curriculum, as appropriate; and
  - (c) Clearly describe the anticipated outcomes, including intermediate steps, if appropriate, that serve as a measure of progress toward the goal.
- (3) A statement of the special education services, related services, supplementary aids and services that the district provides to the student:
- (a) The district bases special education and related services, modifications and supports on peer-reviewed research to the extent practicable to assist students in advancing toward goals, progressing in the general curriculum and participating with other students (including those without disabilities), in academic, nonacademic and extracurricular activities.
  - (b) Each statement of special education services, related or supplementary services, aids, modifications or supports includes a description of the inclusive dates, amount or frequency, location and who is responsible for implementation.
- (4) A statement of the extent, if any, to which the student will not participate with nondisabled students in regular academic, nonacademic and extracurricular activities.
- (5) A statement of any individual modifications and accommodations in the administration of state or districtwide assessments of student achievement.
- (a) A student will not be exempt from participation in state or districtwide assessment because of a disability unless the parent requests an exemption;
  - (b) If the IEP team determines that the student will take ~~an~~ **the** alternate assessment ~~in any area~~ instead of a **the** regular statewide or a districtwide assessment, a statement of why the student cannot participate in the regular assessment and why the alternate assessment ~~selected~~ is appropriate for the student.
- (6) A statement describing how the district will measure student's progress toward completion of the annual goals and when periodic reports on the student's progress toward the annual goals will be provided.

## 6. Agreement to Amend or Modify IEP

Between annual IEP meetings, the district and the parent may agree to make changes in the student's current IEP without holding an IEP meeting. These changes require a signed, written agreement between the district and the parent.

- a. The district and the parent record any amendments, revisions or modifications on the student's current IEP. If additional IEP pages are required these pages must be attached to the existing IEP.
- b. The district files a complete copy of the IEP with the student's education records and informs the student's IEP team and any teachers or service providers of the changes.
- c. The district provides the parent prior written notice of any changes in the IEP and upon request, provides the parent with a revised copy of the IEP with the changes incorporated.

## 7. IEP Team Considerations and Special Factors

- a. In developing, reviewing and revising the IEP, the IEP team considers:
  - (1) The strengths of the student and concerns of the parent for enhancing the education of the student;
  - (2) The results of the initial or most recent evaluation of the student;
  - (3) As appropriate, the results of the student's performance on any general state or districtwide assessments;
  - (4) The academic, developmental and functional needs of the child.
- b. In developing, reviewing and revising the student's IEP, the IEP team considers the following special factors:
  - (1) The communication needs of the student; and
  - (2) The need for assistive technology services and/or devices.
- c. As appropriate, the IEP team also considers the following special factors:
  - (1) For a student whose behavior impedes his or her learning or that of others, strategies, positive behavioral intervention and supports to address that behavior;
  - (2) For a student with limited English proficiency, the language needs of the student as those needs relate to the IEP;
  - (3) For a student who is blind or visually impaired, instruction in Braille and the use of Braille unless the IEP team determines (after an evaluation of reading and writing skills, needs and media, including evaluation of future needs for instruction in Braille or the use of Braille, appropriate reading and writing), that instruction in Braille or the use of Braille is not appropriate;
  - (4) For a student who is deaf or hard of hearing, the student's language and communication needs, including opportunities for direct communication with peers and professional personnel in the student's language and communication mode, academic level and full range of needs, including opportunities for direct instruction in the student's language and communication mode; and

- (5) A statement of any device or service needed for the student to receive a free appropriate public education (FAPE).
- d. In addition to the above IEP contents, the IEP for each eligible student of transition age includes:
- (1) Beginning not later than the IEP in effect when the student turns 16, or younger if determined appropriate by the IEP team, and updated annually thereafter, the IEP must include:
    - (a) Appropriate measurable postsecondary goals based upon age appropriate transition assessments related to training education, employment, and where appropriate, independent living skills; and
    - (b) The transition services (including courses of study) needed to assist the student in reaching those goals.
  - (2) At least one year before a student reaches the age of majority (student reaches the age of 18, or has married or been emancipated, whichever occurs first), a statement that the district has informed the student that all procedural rights will transfer at the age of majority; and
  - (3) If identified transition service providers, other than the district, fail to provide any of the services identified on the IEP, the district will initiate an IEP meeting as soon as possible to address alternative strategies and revise the IEP if necessary.

## 8. Incarcerated Youth

- a. For students with disabilities who are convicted as adults, incarcerated in adult correctional facilities and otherwise entitled to FAPE, the following IEP requirements do not apply:
  - (1) Participation of students with disabilities in state and districtwide assessment; and
  - (2) Transition planning and transition services, for students whose eligibility will end because of their age before they will be eligible to be released from an adult correctional facility based on consideration of their sentence and eligibility for early release.
- b. The IEP team may modify the student's IEP, if the state has demonstrated a bona fide security or other compelling interest that cannot be otherwise accommodated.

## 9. Extended School Year Services

- a. The district makes extended school year (ESY) services available to all students for whom the IEP team has determined that such services are necessary to provide FAPE.
- b. ESY services are:
  - (1) Provided to a student with a disability in addition to the services provided during the typical school year;
  - (2) Identified in the student's IEP; and
  - (3) Provided at no cost to the parent.
- c. The district does not limit consideration of ESY services to particular categories of disability or unilaterally limit the type, amount or duration of service.
- d. The district provides ESY services to maintain the student's skills or behavior, but not to teach new skills or behaviors.
- e. The district's criteria for determining the need for extended school year services include:
  - (1) Regression (a significant loss of skills or behaviors) and recoupment time based on documented evidence; or
  - (2) If no documented evidence, on predictions according to the professional judgment of the team.
- f. "Regression" means significant loss of skills or behaviors in any area specified on the IEP as a result of an interruption in education services.
- g. "Recoupment" means the recovery of skills or behaviors specified on the IEP to a level demonstrated before the interruption of education services.

## 10. Assistive Technology

- a. The district ensures that assistive technology devices or assistive technology services, or both, are made available if they are identified as part of the student's IEP. These services and/or devices may be part of the student's special education, related services or supplementary aids and services.
- b. On a case-by-case basis, the district permits the use of district-purchased assistive technology devices in the student's home or in other settings if the student's IEP team determines that the student needs access to those devices to receive a free appropriate public education. In these situations, district policy will govern liability and transfer of the device when the student ceases to attend the district.

## 11. Transfer Students

- a. In state:

If a student with a disability (who had an IEP that was in effect in a previous district in Oregon) transfers into the district and enrolls in a district school within the same school year, the district (in consultation with the student's parents) provides a free appropriate public education to the student (including services comparable to those described in the student's IEP from the previous district), until the district either:

- (1) Adopts the student's IEP from the previous district; or
- (2) Develops, adopts and implements a new IEP for the student in accordance with all of the IEP provisions.

b. Out of state:

If a student transfers into the district with a current IEP from a district in another state, the district, in consultation with the student's parents, will provide a free appropriate public education to the student, including services comparable to those described in the student's IEP from the previous district, until the district:

- (1) Conducts an initial evaluation (if determined necessary by the district to determine Oregon eligibility) with parent consent and determines whether the student meets eligibility criteria described in Oregon Administrative Rules.
- (2) If the student is eligible under Oregon criteria, the district develops, adopts and implements a new IEP for the student using the Oregon Standard IEP or an approved alternate IEP.
- (3) If the student does not meet Oregon eligibility criteria, the district provides prior written notice to the parents explaining that the student does not meet Oregon eligibility criteria and specifying the date when special education services will be terminated.

R12/31/071/14/16 | RS

# Oregon School Boards Association Selected Sample Policy

Code: **IKF**  
Adopted: **Recommend Approval**

## Graduation Requirements (Version 1)

The Board will establish graduation requirements for the awarding of a high school diploma, a modified diploma, an extended diploma and an alternative certificate which meet or exceed state requirements. A student may satisfy graduation requirements in less than four years. The district will award a diploma to a student fulfilling graduation requirements in less than four years if consent is given by the student's parent or guardian or by the student if they are 18 years of age or older or emancipated.

### Diploma

A high school diploma will be awarded to students in grades 9 through 12 who complete a minimum of 24 credits which include at least:

1. Three credits of mathematics (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);
2. Four credits of English (shall include the equivalent of one unit in written composition);
3. Three credits of science;
4. Three credits of social sciences (including history, civics, geography and economics (including personal finance));
5. One credit in health education;
6. One credit in physical education; and
7. Three credits in career and technical education, the arts or world language (units shall be earned in any one or a combination).

The district shall offer students credit options provided the method for obtaining such credits is described in the student's personal education plan and the credit is earned by meeting requirements described in Oregon Administrative Rule (OAR) 581-022-1131.

To receive a diploma or a modified diploma, in addition to credit requirements, as outlined in OAR 581-022-1130 and OAR 581-022-1134, respectively, a student must:

8. Demonstrate proficiency in the Essential Skills of reading, writing and apply math;
9. Develop an education plan and build an education profile;
10. Demonstrate extended application through a collection of evidence;
11. Participate in career-related learning experiences.

## **Essential Skills**

The district [will] [will not] allow English Language Learner (ELL) students to demonstrate proficiency in the Essential Skill of Apply Mathematics, in a variety of settings, in the student's language of origin for those students who by the end of their 11th grade year are:

12. On track to meet all other graduation requirements; and
13. Unable to demonstrate proficiency in the Essential Skills in English.

The district [will] [will not] allow ELL students to demonstrate proficiency in Essential Skills other than Apply Mathematics, in a variety of settings, in the student's language of origin for those students who by the end of their 11th grade year:

14. Are on track to meet all other graduation requirements;
15. Are unable to demonstrate proficiency in the Essential Skills in English;
16. Have been enrolled in a U.S. school for five years or less; and
17. Received at least a level 3 (Intermediate) on the English Language Proficiency Assessment (ELPA).

[The district will develop procedures to provide assessment options as described in the *Test Administration Manual*, in the ELL student's language of origin for those ELL students who meet the criteria above, and will develop procedures to ensure that locally scored assessment options administered in an ELL student's language of origin are scored by a qualified rater.]

## **[Essential Skills Appeal**

The district will [establish an appeal process] [follow Board policy KL - Public Complaints] in the event of an appeal for the denial of a diploma based on the Essential Skills graduation requirement. The district will retain student work samples and student performance data to ensure that sufficient evidence is available in the event of an appeal.]

## **Modified Diploma**

A modified diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic standards established by the State Board of Education for a diploma while receiving reasonable modifications and accommodations. A modified diploma may only be awarded to a student who meets the eligibility criteria below:

18. Has a documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers; or
19. Has a documented history of a medical condition that creates a barrier to achievement.

Having met the above eligibility criteria, a modified diploma will be awarded to students, who while in grade nine through completion of high school, complete 24 credits which shall include:

20. Three credits in English;
21. Two credits in mathematics;
22. Two credits in science;
23. Two credits in social sciences;
24. One credit in health;
25. One credit in physical education; and
26. One credit in career technology, the arts or a world language.

In addition to credit requirements as outlined in OAR 581-022-1134, a student must:

27. Develop an education plan and build an education profile;
28. Demonstrate extended application through a collection of evidence.

A student must also demonstrate proficiency in the Essential Skills with reasonable modifications and accommodations.

Districts may make modifications to the assessment for students who seek a modified diploma when the following conditions are met:

29. For a student on an IEP, any modifications to work samples must be consistent with the requirements established in the IEP. Modifications are changes to the achievement level, construct or measured outcome of an assessment. This means that IEP or school teams responsible for approving modifications for a student's assessment may adjust the administration of the assessment and/or the assessment's achievement standard;
30. For a student not on an IEP, any modifications to work samples must have been provided to the student during their instruction in the content area to be assessed and in the year in which the student is being assessed, and modifications must be approved by the school team that is responsible for monitoring the student's progress toward the modified diploma.

Students not on an IEP or a 504 Plan may not receive a modified Smarter Balanced assessment.

A student's school team shall decide that a student should work toward a modified diploma no earlier than the end of grade six and no later than two years before the student's anticipated exit from high school. A student's school team may decide to revise a modified diploma decision.

A student's school team may decide that a student who was not previously working toward a modified diploma should work toward one when the student is less than two years from anticipated exit from high school if the documented history has changed.

### **Extended Diploma**

An extended diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic content standards for a diploma while receiving modifications and accommodations. To be eligible for an extended diploma, a student must:

1. While in grade nine through completion of high school, complete 12 credits, which may not include more than six credits in a self-contained special education classroom and will include:
  - a. Two credits of mathematics;
  - b. Two credits of English;
  - c. Two credits of science;
  - d. Three credits of history, geography, economics or civics;
  - e. One credit of health;
  - f. One credit of physical education; and
  - g. One credit of the arts or a world language.
2. Have a documented history of:
  - a. An inability to maintain grade level achievement due to significant learning and instructional barriers;
  - b. A medical condition that creates a barrier to achievement; or
  - c. A change in the student's ability to participate in grade level activities as a result of a serious illness or injury that occurred after grade eight.

Beginning in grade five or after a documented history to qualify for an extended diploma has been established, the district shall annually provide to the parents or guardians of the student, information about the availability and requirements of a modified diploma, an extended diploma and an alternative certificate.

### **Alternative Certificates**

Alternative certificates will be awarded to students who do not satisfy the requirements for a diploma, a modified diploma or an extended diploma if the students meet minimum credit requirements established by the district. Alternative certificates will be awarded based on individual student needs and achievement. A student who receives a modified diploma, an extended diploma or an alternative certificate will have the option of participating in a high school graduation ceremony with the student's class.

### **Other District Responsibilities**

The district will ensure that students have onsite access to the appropriate resources to achieve a diploma, a modified diploma, an extended diploma or an alternative certificate at each high school. The district will provide age appropriate and developmentally appropriate literacy instruction to all students until graduation.

The district may not deny a student, who has the documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers, or of a medical condition that creates a barrier to achievements, the opportunity to pursue a diploma with more stringent requirements than a modified diploma or an extended diploma for the sole reason the student has the documented history.

The district may award a modified diploma or an extended diploma to a student only upon the written consent of the student's parent or guardian. The district shall receive the written consent during the school

year in which the modified diploma or the extended diploma is awarded. A student who is emancipated or has reached the age of 18 at the time the modified diploma or extended diploma is awarded may sign the consent.

A student shall have the opportunity to satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in either 4 years after starting the ninth grade, or until the student reaches the age of 21, if the student is entitled to a public education until the age of 21 under state or federal law.

A student may satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in less than four years but not less than three years. In order to satisfy the requirements for a modified diploma, extended diploma or alternative certificate in less than four years, the student's parent or guardian or a student who is emancipated or has reached the age of 18 must provide written consent which clearly states the parent, guardian or student is waiving the fourth year and/or years until the student reaches the age of 21. A copy of the consent will be forwarded to the district superintendent who will annually report to the Superintendent of Public Instruction the number of such consents.

A student who receives a modified diploma, an extended diploma or an alternative certificate will have the option of participating in a high school graduation ceremony with the student's class.

A student who receives a modified diploma, an extended diploma or an alternative certificate shall have access to individually designed instructional hours, hours of transition services and hours of other services that equals at least the total number of instructional hours that are required to be provided to students who are attending a public high school, unless reduced by the IEP team.

The district will award to students with disabilities a document certifying successful completion of program requirements. No document issued to students with disabilities educated in full or in part in a special education program shall indicate that the document is issued by such a program. When a student who has an individualized education program (IEP) completes high school, the district will give the student an individualized summary of performance.

Eligible students with disabilities are entitled to a Free Appropriate Public Education (FAPE) until the age of 21, even if they have earned a modified diploma, an extended diploma, an alternative certificate or completion of a General Education Development document. The continuance of services for students with disabilities for a modified diploma, extended diploma or alternative certificate is contingent on the IEP team determining the student's continued eligibility and special education services are needed.

Students and their parents will be notified of graduation and diploma requirements.

[The district will review graduation requirements biennially in conjunction with the secondary school improvement plan. Graduation requirements may be revised to address student performance.]

The district may not deny a diploma to a student who has opted out of statewide assessments if the student is able to satisfy all other requirements for the diploma. Students who opt-out will need to meet the Essential Skills graduation requirement using another approved assessment option. Students may opt out of the Smarter Balanced or alternate Oregon Extended Assessment by completing the Oregon Department of Education's Opt-out Form<sup>1</sup> and submitting the form to the district.

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<sup>1</sup>[www.ode.state.or.us](http://www.ode.state.or.us); or navigate to Teaching & Learning > Testing - Student Assessment > Smarter Balanced

The district will issue a high school diploma, upon request, to a person who served in the Armed Forces<sup>2</sup>, as specified in Oregon law, if the person was discharged or released under honorable conditions and has received either a General Educational Development, a post-secondary degree or has received a minimum score on the Armed Services Vocational Aptitude Battery.

The district shall establish conduct and discipline consequences for student-initiated test impropriety. “Student-initiated test impropriety” means student conduct that is inconsistent with the *Test Administration Manual* or accompanying guidance; or results in a score that is invalid.

END OF POLICY

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**Legal Reference(s):**

<a href="#">ORS 329.095</a>		<a href="#">OAR 581-022-1210</a>
<a href="#">ORS 329.451</a>	<a href="#">OAR 581-022-0615</a>	<a href="#">OAR 581-022-1215</a>
<a href="#">ORS 332.107</a>	<a href="#">OAR 581-022-0617</a>	<a href="#">OAR 581-022-1350</a>
<a href="#">ORS 332.114</a>	<a href="#">OAR 581-022-1130</a>	<a href="#">OAR 581-022-1910</a>
<a href="#">ORS 338.115</a>	<a href="#">OAR 581-022-1131</a>	
<a href="#">ORS 339.115</a>	<a href="#">OAR 581-022-1133</a>	<a href="#">HB 2655 (2015)</a>
<a href="#">ORS 339.505</a>	<a href="#">OAR 581-022-1134</a>	
<a href="#">ORS 343.295</a>	<a href="#">OAR 581-002-1135</a>	

TEST ADMINISTRATION MANUAL, APPENDIX L-REQUIREMENTS FOR ASSESSMENT OF ESSENTIAL SKILLS.  
R10/24/13 | 1/14/16 | PH

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<sup>2</sup>The policy applies to any person who:

1. Served in the Armed Forces of the U.S. at any time during:
  - a. World War I;
  - b. World War II;
  - c. The Korean Conflict; or
  - d. The Vietnam War;
2. Served in the Armed Forces of the U.S. and was physically present in:
  - a. Operation Urgent Fury (Grenada);
  - b. Operation Just Cause (Panama);
  - c. Operation Desert Shield/Desert Storm (Persian Gulf War);
  - d. Operation Restore Hope (Somalia);
  - e. Operation Enduring Freedom (Afghanistan); or
  - f. Operation Iraqi Freedom (Iraq);
3. Served in the Armed Forces of the U.S. in an area designated as a combat zone by the President of the U.S.

# Oregon School Boards Association Selected Sample Policy

Code: **IKF**  
Adopted: **Not Recommended: Rec. V. 1**

## Graduation Requirements (Version 2)

The Board will establish graduation requirements for the awarding of a high school diploma, a modified diploma, an extended diploma and an alternative certificate which meet or exceed state requirements. A student may satisfy graduation requirements in less than four years. The district will award a diploma to a student fulfilling graduation requirements in less than four years if consent is given by the student's parent or guardian or by the student if they are 18 years of age or older or emancipated.

The district will ensure that students have onsite access to the appropriate resources to achieve a diploma, a modified diploma, an extended diploma or an alternative certificate at each high school. The district will provide age appropriate and developmentally appropriate literacy instruction to all students until graduation.

### Essential Skills

The district [will][will not] allow English Language Learner (ELL) students to demonstrate proficiency in the Essential Skills of Apply Mathematics, in a variety of settings, in the student's language of origin for those students who by the end of their 11th grade year are:

1. On track to meet all other graduation requirements; and
2. Unable to demonstrate proficiency in the Essential Skills in English.

The district [will][will not] allow ELL students to demonstrate proficiency in Essential Skills other than Apply Mathematics, in a variety of settings, in the student's language of origin for those students who by the end of their 11th grade year:

1. Are on track to meet all other graduation requirements;
2. Are unable to demonstrate proficiency in the Essential Skills in English;
3. Have been enrolled in a U.S. school for five years or less; and
4. Receives at least a level 3 (Intermediate) on the English Language Proficiency Assessment (ELPA).

[The district will develop procedures to provide assessment options as described in the *Test Administration Manual*, in the ELL student's language of origin for those ELL students who meet the criteria above, and will develop procedures to ensure that locally scored assessment options administered in an ELL student's language of origin are scored by a qualified rater.]

The district may not deny a student, who has the documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers, or of a medical condition that creates a barrier to achievements, the opportunity to pursue a diploma with more stringent requirements than a modified diploma or an extended diploma for the sole reason the student has the documented history.

The district may award a modified diploma or an extended diploma to a student only upon the written consent of the student's parent or guardian. The district shall receive the written consent during the school year in which the modified diploma or the extended diploma is awarded. A student who is emancipated or has reached the age of 18 at the time the modified diploma or the extended diploma is awarded may sign the consent.

A student shall have the opportunity to satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in either four years after starting the ninth grade, or until the student reaches the age of 21, if the student is entitled to a public education until the age of 21 under state or federal law.

A student may satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in less than four years but not less than three years. In order to satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in less than four years, the student's parent or guardian or a student who is emancipated or has reached the age of 18 must provide written consent which clearly states the parent, guardian or student is waiving the fourth year and/or years until the student reaches the age of 21. A copy of the consent will be forwarded to the district superintendent who will annually report to the Superintendent of Public Instruction the number of such consents.

Beginning in grade five or after a documented history to qualify for an extended diploma has been established, the district will annually provide to the parents or guardians of the student, information about the availability and requirements of a modified diploma, an extended diploma and an alternative certificate.

A student who receives a modified diploma, an extended diploma or an alternative certificate will have the option of participating in a high school graduation ceremony with the student's class.

A student who receives a modified diploma, an extended diploma or an alternative certificate shall have access to individually designed instructional hours, hours of transition services and hours of other services that equals at least the total number of instructional hours that is required to be provided to students who are attending a public high school, unless reduced by the individualized education program (IEP) team.

The district will award to students with disabilities a document certifying successful completion of program requirements. No document issued to students with disabilities educated in full or in part in a special education program shall indicate that the document is issued by such a program. When a student who has an ~~individualized education program (IEP)~~ completes high school, the district will give the student an individualized summary of performance.

Eligible students with disabilities are entitled to a Free Appropriate Public Education (FAPE) until the age of 21, even if they have earned a modified diploma, an extended diploma, an alternate certificate or completion of a General Education Development document. The continuance of services for students with disabilities for a modified diploma, an extended diploma or an alternative certificate is contingent on the IEP team determining the student's continued eligibility and special education services are needed.

Students and their parents will be notified of graduation and diploma requirements.

[The district will review graduation requirements biennially in conjunction with the secondary school improvement plan. Graduation requirements may be revised to address student performance.]

The district may not deny a diploma to a student who has opted out of the Smarter Balanced or alternate Oregon Extended Assessment if the student is able to satisfy all other requirements for the diploma. Students who opt-out will need to meet the Essential Skills graduation requirement using another approved assessment option.

The district will issue a high school diploma, upon request, to a person who served in the Armed Forces<sup>1</sup>, as specified in Oregon law, if the person was discharged or released under honorable conditions and has received either a General Educational Development, a post-secondary degree or has received a minimum score on the Armed Services Vocational Aptitude Battery.

The district shall establish conduct and discipline consequences for student-initiated test impropriety. “Student-initiated test impropriety” means student conduct that is inconsistent with the *Test Administration Manual* or accompanying guidance; or results in a score that is invalid.

END OF POLICY

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**Legal Reference(s):**

<a href="#">ORS 329.095</a>	<a href="#">ORS 343.295</a>	<a href="#">OAR 581-022-1135</a>
<a href="#">ORS 329.451</a>	<a href="#">OAR 581-022-0615</a>	<a href="#">OAR 581-022-1210</a>
<a href="#">ORS 332.107</a>	<a href="#">OAR 581-022-0617</a>	<a href="#">OAR 581-022-1215</a>
<a href="#">ORS 332.114</a>	<a href="#">OAR 581-022-1130</a>	<a href="#">OAR 581-022-1350</a>
<a href="#">ORS 338.115</a>	<a href="#">OAR 581-022-1131</a>	
<a href="#">ORS 339.115</a>	<a href="#">OAR 581-022-1133</a>	<a href="#">HB 2655 (2015)</a>
<a href="#">ORS 339.505</a>	<a href="#">OAR 581-022-1134</a>	

TEST ADMINISTRATION MANUAL, APPENDIX L-REQUIREMENTS FOR ASSESSMENT OF ESSENTIAL SKILLS.  
R10/24/131/14/16 | PH

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<sup>1</sup>The policy applies to any person who:

1. Served in the Armed Forces of the U.S. at any time during:
  - a. World War I;
  - b. World War II;
  - c. The Korean Conflict; or
  - d. The Vietnam War;
2. Served in the Armed Forces of the U.S. and was physically present in:
  - a. Operation Urgent Fury (Grenada);
  - b. Operation Just Cause (Panama);
  - c. Operation Desert Shield/Desert Storm (Persian Gulf War);
  - d. Operation Restore Hope (Somalia);
  - e. Operation Enduring Freedom (Afghanistan); or
  - f. Operation Iraqi Freedom (Iraq);
3. Served in the Armed Forces of the U.S. in an area designated as a combat zone by the President of the U.S.

# Oregon School Boards Association Selected Sample Policy

Code: **IKF-AR**  
 Adopted: **Not Recommended with approval of v. 1**

## Graduation Requirements

### Diploma

A high school diploma will be awarded to students in grades 9 through 12 who complete a minimum of 24 credits according to the following table:

Subject	Graduates of 2014 and beyond
English	4 (shall include the equivalent of one unit in written composition)
Math	3 (shall include one unit at Algebra I level and two units that are at a higher level)
Science	3
Social Studies	3 (including history, civics, geography and economics (including personal finance))
Health	1
PE	1
Career Technical Ed, The Arts or World Language (in any one or combination thereof)	3 (units shall be earned in any one or a combination)
Electives	6
<b>Total credits required to graduate:</b>	<b>24</b>
<b>Essential Skills required:</b>	
	Read and comprehend a variety of text, write clearly and accurately, apply math, any additional Essential Skills adopted by the State Board of Education.
<b>Other graduation requirements:</b>	
	Develop an education plan and build an education profile
	Demonstrate extended application through a collection of evidence
	Participate in career-related learning experiences

The district shall offer students credit options provided the method for obtaining such credit is described in the student's personal education plan and the credit is earned by meeting requirements described in OAR 581-022-1131.

### [Essential Skills Appeal

The district will [establish an appeal process] [follow Board policy KL - Public Complaints] in the event of an appeal for the denial of a diploma based on the Essential Skills graduation requirement. The district will retain student work samples and student performance data to ensure that sufficient evidence is available in the event of an appeal.]

## Modified Diploma

A modified diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic standards for a high school diploma even with reasonable modifications and accommodations. A modified diploma may only be awarded to a student who meets the eligibility criteria listed below:

1. Has a documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers; or
2. Has a documented history of a medical condition that creates a barrier to achievement.

Having met the above eligibility criteria, a modified diploma will be awarded to students who, while in grade nine through completion of high school, complete 24 credits which shall include:

Subject	Modified Diploma Requirements
English	3
Math	2
Science	2
Social Studies	2
Health	1
PE	1
Career Technical Ed, The Arts or World Language	1
Electives	12
<b>Total credits required for modified diploma:</b>	24
<b>Essential Skills required:</b>	Read and comprehend a variety of text, write clearly and accurately, apply math, any additional Essential Skills adopted by the State Board of Education.
<b>Other graduation requirements:</b>	Develop an education plan and build an education profile. Demonstrate extended application through a collection of evidence.

Districts may make modifications to the assessment for students who seek a modified diploma when the following conditions are met:

3. For a student on an IEP, any modifications to work samples must be consistent with the requirements established in the IEP. Modifications are changes to the achievement level, construct or measured outcome of an assessment. This means that IEP or school teams responsible for approving modifications for a student's assessment may adjust the administration of the assessment and/or the assessment's achievement standard.
4. For a student not on an IEP, any modifications to work samples must have been provided to the student during his/her instruction in the content area to be assessed, and in the year in which the student is being assessed, and modifications must be approved by the school team that is responsible for monitoring the student's progress toward the modified diploma.

Students not on an IEP or a 504 Plan may not receive a modified Smarter Balanced assessment.

A student's school team shall decide that a student should work toward a modified diploma no earlier than the end of grade six and no later than two years before the student's anticipated exit from high school. A student's school team may decide to revise a modified diploma decision.

A student's school team may decide that a student who was not previously working towards a modified diploma should work towards one when the student is less than two years from anticipated exit from high school if the documented history has changed.

### **Extended Diploma**

An extended diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic content standards for a diploma while receiving modifications and accommodations. To be eligible for an extended diploma, a student must:

5. While in grade nine through completion of high school, complete 12 credits, which may not include more than six credits in a self-contained special education classroom and will include:
  - a. Two credits of mathematics;
  - b. Two credits of English;
  - c. Two credits of science;
  - d. Three credits of history, geography, economics or civics;
  - e. One credit of health;
  - f. One credit of physical education;
  - g. One credit of the arts or a world language.
6. Have a documented history of:
  - a. An inability to maintain grade level achievement due to significant learning and instructional barriers;
  - b. A medical condition that creates a barrier to achievement; or
  - c. A change in the student's ability to participate in grade level activities as a result of a serious illness or injury that occurred after grade eight.

### **Alternative Certificates**

Alternative certificates will be awarded to students who do not satisfy the requirements for a diploma, a modified diploma or an extended diploma if the students meet minimum credit requirements established by the district. Alternative certificates will be awarded based on individual student needs and achievement.

### **Assessment**

Students may opt-out of the Smarter Balanced or alternate Oregon Extended Assessment by completing the Oregon Department of Education's Opt-out Form<sup>1</sup> and submitting the form to the district.

R10/24/131/14/16 | PH

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<sup>1</sup>[www.ode.state.or.us](http://www.ode.state.or.us); or navigate to Teaching & Learning > Testing - Student Assessment > Smarter Balanced

# Oregon School Boards Association Selected Sample Policy

Code: **IL**  
Adopted: **Recommend Approval**

## Assessment Program\*\*

The district's assessment program shall be designed for the purpose of determining district and school program improvement and individual student needs including the requirements of the Oregon Administrative Rules (~~OAR~~) ~~581-022-0606, 581-022-1210 and 581-022-1670~~. Each year the district shall determine each student's progress toward achieving federal, state and local achievement requirements.

Assessments shall be used to measure the academic content standards and Essential Skills and to identify students who meet or exceed the performance standards and Essential Skills adopted by the State Board of Education.

Accordingly, the district shall maintain the following assessment program:

1. Criterion-reference assessments, including performance-based assessments, content-based assessments and other valid methods as may be required by state and federal requirements;
2. Assessment of Essential Skills;
3. Individual diagnostic and ability evaluations in all grades when students have been referred and parental permission obtained;
4. Assessments by individual teachers;
5. Optional schoolwide and grade levelwide assessments, as recommended by the superintendent and as approved by the Board.

It is the intent of the Board that progress be measured in a manner that clearly enables the student and parents to know whether the student is making progress toward meeting or exceeding academic content standards and Essential Skills. District, school and individual results shall be reported to the Board, parents and the community, as prescribed by law.

The district shall make additional services or alternative educational or public school options available to any student who has not met or has exceeded all of the state-required academic content standards. Additionally, students in schools receiving Title I moneys that have been identified by the Oregon Department of Education (ODE), will be provided supplemental services and public school options as required by law.

The district shall not discriminate in the methods, practices and materials used for assessment, evaluating and counseling students on the basis of race, color, national origin, religion, sex, sexual orientation, age, disability or marital status. Discrimination complaints shall be processed in accordance with established procedures.

Staff will receive in-service education in the use of designated assessments and interpretation of assessment results.

A student may opt-out of the Smarter Balanced and/or alternate Oregon Extended Assessments in English language arts and mathematics as provided in state law. The district shall provide the required notice and necessary forms to the student. The district shall provide supervised study time for students who are excused from participating in the assessment. A student may be excused from the Oregon Statewide Assessment Program for disability or religious reasons. Parents and adult students will be provided the required notices<sup>1</sup> that include a time frame in which statewide assessments will take place, and an adult student's or parent's right to request an exemption from taking the statewide summative assessments.

The district shall establish conduct and discipline consequences for student-initiated test impropriety. "Student-initiated test impropriety" means student conduct that is inconsistent with the *Test Administration Manual* or accompanying guidance; or results in a score that is invalid.

The superintendent shall ensure a periodic review and evaluation of the district's assessment program is conducted.

END OF POLICY

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**Legal Reference(s):**

[ORS 40.245](#)  
[ORS 326.565](#)  
[ORS 326.575](#)  
[ORS 329.485](#)  
[ORS 336.187](#)  
[ORS 659.870](#)

[OAR 581-021-0030](#)  
[OAR 581-022-0606](#)  
[OAR 581-022-0610](#)  
[OAR 581-022-0612](#)  
[OAR 581-022-0615](#)  
[OAR 581-022-1140](#)  
[OAR 581-022-1210](#)

[OAR 581-022-1510](#)  
[OAR 581-022-1670](#)  
[OAR 581-022-1910](#)  
HB 2655 (2015)

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2011); Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2011).

Protection of Pupil Rights, 20 U.S.C. § 1232h (2006); Student Rights in Research, Experimental Programs and Testing, 34 C.F.R. Part 98 (2006).

Individuals with Disabilities Education Act (IDEA), 20 U.S.C. §§ 1400 - 1427 (2006).

No Child Left Behind Act of 2001, 20 U.S.C. §§ 6311-6322 (2006).

Elementary and Secondary Education Act (ESEA) Flexibility Waiver; ~~July 18, 2012~~ July 23, 2015.

~~HR 9/20/12~~ 1/14/16 | PH

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<sup>1</sup>Districts are required to provide notice twice each year: once at the beginning of the year; and second time at least 30 days prior to the administration of the test. The 30-day notice must first be provided during the 2015-2016 school year. The beginning of the year notice must first be provided during the 2016-2017 school year.

# Oregon School Boards Association Selected Sample Policy

Code: **ILBA**  
Adopted: **Recommend Deletion**

## Assessment Exemption

The district believes the annual assessment of student and district progress is a vital component of the instructional process. While it is the district's intention to include every student in the Oregon Statewide Assessment Program, it is recognized that a few students may be exempted from this assessment as provided by OAR 581-022-0612 and 581-022-1910.

END OF POLICY

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### Legal Reference(s):

[ORS 40.245](#)  
[ORS 326.565](#)  
[ORS 326.575](#)  
[ORS 329.485](#)

[ORS 336.187](#)  
[OAR 581-022-0606](#)  
[OAR 581-022-0610](#)

[OAR 581-022-0612](#)  
[OAR 581-022-1510](#)  
[OAR 581-022-1910](#)

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2011); Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2011).

Protection of Pupil Rights, 20 U.S.C. § 1232h (2006); Student Rights in Research, Experimental Programs and Testing, 34 C.F.R. Part 98 (2006).

Individuals with Disabilities Education Act (IDEA), 20 U.S.C. §§ 1400 - 1427 (2006).

Rehabilitation Act of 1973, 29 U.S.C. §§ 791, 793-794 (2006).

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213; 29 C.F.R. Part 1630 (2006); 28 C.F.R. Part 35 (2006).

Or. Dep't of Educ., Or. Statewide Assessment Admin. Manual(2005).

Americans with Disabilities Act Amendments Act of 2008.

10/21/03 | NC

# Oregon School Boards Association Selected Sample Policy

Code: **INDB**  
Adopted: **Not Recommended for  
Adoption**

## Flag Displays and Salutes

A United States flag and an Oregon flag shall be displayed on or near each school building under the control of the Board or used by the district, during school hours, except in unsuitable weather and at any other time the Board deems proper.

The district shall obtain and display a United States flag of an appropriate size for each classroom.

Students shall receive instruction in respect for the national flag, and be provided an opportunity to salute the United States flag at least once each week by reciting *The Pledge of Allegiance*.

A flag salute may be implemented at assemblies, before or after school, at lunch, special events, home room class, athletic contests or at other times deemed appropriate by the principal. Individual staff members and students who do not participate in the salute must maintain a respectful silence during the salute.

Upon request from an Oregon Sovereign tribal government, a flag representing the sovereign tribal government must be displayed on, near or within a school building during school hours. The location of the flag will be determined by the district in consultation with the requesting sovereign tribal government.

END OF POLICY

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### Legal Reference(s):

[ORS 336.067](#)  
[ORS 339.875](#)

[OAR 581-021-0043](#)

W. Va. St. Bd. of Educ. v. Barnette, 319 U.S. 624 (1943).

10/24/131/14/16 | SL

# Oregon School Boards Association Selected Sample Policy

Code: **JEA**  
Adopted: **Recommend Approval**

## Compulsory Attendance\*\*

Except when exempt by Oregon law, all students between ages 7-6 and 18 who have not completed the 12th grade are required to regularly attend regularly, a public full-time school full-time during the entire school term.

All students five or six years of age who have been enrolled in a public school are required to attend regularly while enrolled in the public school.

Persons having legal control of a student between the ages 7-6 and 18, who has not completed the 12th grade, are required to have the student attend and maintain the child in regular attendance during the school term. Persons having legal control of a student who is five or six years of age and has enrolled the child in a public school, are required to have the student attend and maintain the child in regular attendance during the school term.

Under the superintendent's direction and supervision, attendance supervisors shall monitor and report any violation of the compulsory attendance law to the superintendent or designee. Failure to send a student and to maintain a student in regular attendance is a Class C violation.

The district will develop procedures for issuing a citation.

A parent who is not supervising his/her student by requiring school attendance may also be in violation of Oregon Revised Statute (ORS) 163.577 (1)(c). Failing to supervise a child is a Class A violation.

[In addition, under policy JHFDA - Suspension of Driving Privileges, the district may report students with 10 consecutive days unexcused absence or 15 cumulative days unexcused absences in a single semester to the Oregon Department of Transportation.]

### Exemptions from Compulsory School Attendance

In the following cases, students shall not be required to attend public schools full-time:

1. Students being taught in a private or parochial school in courses of study usually taught in grades 1-12 kindergarten through grade 12 in the public schools, and in attendance for a period equivalent to that required of students attending public schools;
2. Students proving to the Board's satisfaction that they have acquired equivalent knowledge to that acquired in the courses of study taught in grades 1-12 kindergarten through grade 12 in the public schools;
3. Students being taught, by a private teacher, the courses of study usually taught in grades 1-12 kindergarten through grade 12 in the public school for a period equivalent to that required of students attending public schools;
4. Students being educated in the home by a parent:

- a. {When a student is taught or is withdrawn from a public school to be taught by a parent or private teacher, the parent or teacher must notify the {Lane} Education Service District (ESD) in writing within 10 days of such occurrence. In addition, when a home-schooled student moves to a new ESD, the parent shall notify the new ESD in writing, within 10 days, of the intent to continue home schooling. The ESD superintendent shall acknowledge receipt of any notification in writing within 90 days of receipt of the notification. The ESD is to notify, at least annually, school districts of home-schooled students who reside in their district;
  - b. Each student being taught by a parent or private teacher shall be examined no later than August 15, following grades 3, 5, 8 and 10:
    - (1) If the student was withdrawn from public school, the first examination shall be administered at least 18 months after the date the student withdrew;
    - (2) If the student never attended public or private school, the first examination shall be administered prior to the end of grade 3;
    - (3) Procedures for home-schooled students with disabilities are set out in Oregon Administrative Rule (OAR) 581-021-0029.
  - c. Examinations testing each student shall be from the list of approved examinations from the State Board of Education;
  - d. The examination must be administered by a neutral individual qualified to administer tests on the approved list provided by the Oregon Department of Education;
  - e. The person administering the examination shall score the examination and report the results to the parent. Upon request of the ESD superintendent, the parent shall submit the results of the examination to the ESD;
  - f. All costs for the test instrument, administration and scoring are the responsibility of the parent;
  - g. In the event the ESD superintendent finds that the student is not showing satisfactory educational progress, the ESD superintendent shall provide the parent with a written statement of the reasons for the finding, based on the test results and shall follow the guidelines in Oregon Revised Statutes and Oregon Administrative Rules.}
5. Students excluded from attendance as provided by law;
  6. An exemption may be granted to the parent of any student 16 or 17 years of age who is lawfully employed full-time, or who is lawfully employed part-time and enrolled in school, a community college or an alternative education program as defined in ORS 336.615.

END OF POLICY

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**Legal Reference(s):**

[ORS 153.018](#)  
[ORS 163.577](#)  
[ORS 336.615](#) to -336.665  
[ORS 339.010](#) to -339.090  
[ORS 339.095](#)

[ORS 339.990](#)  
[ORS 807.065](#)  
[ORS 807.066](#)  
[OAR 581-021-0026](#)  
[OAR 581-021-0029](#)

[OAR 581-021-0071](#)  
[OAR 581-021-0077](#)  
[SB 321 \(2015\)](#)

HR2/28/13 1/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **JEBA**  
Adopted: **Recommend Approval**

## Early Entrance\*\*

A student is considered six years of age and will be admitted into the first grade a public school if his/her sixth birthday occurs on or before September 1, as established by law. In addition, a student whose sixth birthday occurs after that date may be admitted to the first grade if he/she has maintained regular attendance in any grade of a public full-time school during the entire school term.

1. ~~Is a first grade student transferring from a public school in another district, or from a private school;~~
2. ~~Completed a successful year in a public kindergarten the previous year and would be continuing his/her formal education.~~

A student will be admitted to kindergarten if his/her fifth birthday occurs one year earlier than the date established by law for entry into first grade on or before September 1, or is a kindergarten student transferring from a public school in another district.

Early entry into school will may be allowed for a student whose fifth/sixth birthday occurs after September 1, but not later than [November 15] and whose needs would best be met in the school program based on an analysis by qualified professional staff of his/her:

3. Cognitive development;
4. Social development;
5. Physical development.

The superintendent shall identify screening processes and instruments which will provide a dependable assessment of the preceding criteria.

Parents will be required to pay the cost of the special testing involved.

END OF POLICY

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### Legal Reference(s):

[ORS 327.006](#)  
[ORS 336.092](#)

[ORS 336.095](#)  
[ORS 339.115](#)

[ORS 343.395](#)  
SB 321 (2015)

R8/06/971/14/16 | MWPH

# Oregon School Boards Association Selected Sample Policy

Code: **JEBA-AR**  
Revised/Reviewed: **Recommend Approval**

## **Early Entrance into the First Grade\*\***

If a request for early admission to kindergarten or first grade is received by the district, the following guidelines will be used:

1. The Request for Early ~~First-Grade~~ Entrance form must be filled out by a parent. The completion of this form and receipt of a formal evaluation will activate the early entry committee. Members of that committee are: kindergarten or first-grade teachers, the speech and language therapist, building principal(s) and the director of special services;
2. The parents will be made aware that it is their responsibility to secure testing by a qualified agency approved by the director of special services.

Three areas that must be tested include:

- a. Cognitive (intelligence);
- b. Affective (social/emotional); and
- c. Physical.

Test scores should be in the top quartile for entering ~~first~~ the requested grade level.

3. All information must be received by the director of special services on or before {August 1};
4. The early entry committee will review the test information and the parent interview forms. If a student is to be considered for early entrance, the student will also be required to participate in a one-day screening/observation conducted by the district during the second week of {August};
5. The screening committee will make recommendation to the superintendent, and parents will be notified by the end of the third week in August;
6. A written appeal can be made by the parents to the superintendent who may affirm, reverse or modify the early entry committee's decision. A subsequent hearing may be held with the Board if the respective decision does not meet with the approval of the parent(s).

**REQUEST FOR EARLY ENTRANCE**

Date \_\_\_\_\_

Child Name \_\_\_\_\_

I request that my child be reviewed for early admission to:

(Check one)  Kindergarten ~~or the~~  First grade.

I will have \_\_\_\_\_ (Child name) evaluated at my expense in the following areas:

- 7. Cognitive (intelligence);
- 8. Affective (social/emotional);
- 9. Physical.

I understand the test scores must equal or surpass the established norms for ~~six-year, five-month age~~ the requested attendance grade level in all areas of assessment by [August 15]. I will receive written information from the district concerning my request within three weeks of providing them with the test scores.

\_\_\_\_\_  
Parent Signature

10/22/081/14/16 | MWP/PH

\_\_\_\_\_  
Date

# Oregon School Boards Association Selected Sample Policy

Code: **JEC**  
Adopted: Not Recommended; Rec. v.2

## Admissions (Version 1)

All persons seeking admission to the district must satisfactorily meet all academic, age, immunization, tuition and other eligibility prerequisites for admission as set forth in state and federal law, Board policy and administrative regulations. All candidates for admission will be informed of admission requirements.

Students located in the district shall not be excluded from admission solely because the student does not have a fixed place of residence or solely because the student is not under the supervision of a parent.

Students located in the district shall not be excluded from admission where they are otherwise eligible, and not yet attained the age of 19 prior to the beginning of the current school year.

The district may admit an otherwise eligible person who is not receiving special education and who has not yet attained 21 years of age prior to the beginning of the current school year if the person is shown to be in need of additional education in order to receive a diploma.

END OF POLICY

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### Legal Reference(s):

[ORS 327.006](#)  
[ORS 336.092](#)  
[ORS 339.010](#)  
[ORS 339.020](#)

[ORS 339.030](#)  
[ORS 339.115](#)  
[ORS 339.125](#)  
[ORS 339.133](#)

[ORS 339.134](#)  
[ORS 433.267](#)

[OAR 581-022-0705](#)

Illegal Immigration and Immigration Reform Act of 1996, 8 U.S.C. §§ 1101, 1221, 1252, 1324, 1363, 1367 (2006).  
McKinney-Vento Homeless Education Assistance Improvements Act of 2001, 42 U.S.C. §§ 11431-11435 (2005).  
9/28/07 | KP

# Oregon School Boards Association Selected Sample Policy

Code: **JEC**  
Adopted: **Recommend Approval**

## Admissions\*\* (Version 2)

The Board is committed to providing an educational program for all students living in the district. The Board believes all students living in the district who have not completed 12 years of education should ~~attend school~~ regularly attend a public full-time school and be included in the available educational programs.

~~State law requires students to be age six on or before September 1 to enter first grade; and age five on or before September 1 to enter kindergarten.~~ State law considers a child to be six years of age if the sixth birthday of the child occurred on or before September 1 and a child five years of age is considered to be kindergarten age if the fifth birthday of the child occurred on or before September 1.

All new students must register in the office. Registration requirements include proof of the student's birth date (a birth certificate, a hospital record or a baptismal record) and immunization records as required by law. Students admitted to any grade must show evidence of completing the prior school years.

Students enrolled in the district shall comply with Oregon laws related to age, residence, health, attendance and immunization.

Students located in the district shall not be excluded from admission solely because the student does not have a fixed place of residence or solely because the student is not under the supervision of a parent.

Students located in the district shall not be excluded from admission where they are otherwise eligible, not receiving special education, and not yet attained the age of 19 prior to the beginning of the current school year.

The district may admit an otherwise eligible person who is not receiving special education and who has not yet attained 21 years of age prior to the beginning of the current school year if the person is shown to be in need of additional education in order to secure a high school diploma.

END OF POLICY

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### Legal Reference(s):

[ORS 327.006](#)

[ORS 336.092](#)

[ORS 339.010](#)

[ORS 339.020](#)

[ORS 339.030](#)

[ORS 339.115](#)

[ORS 339.125](#)

[ORS 339.133](#)

[ORS 339.134](#)

[ORS 433.267](#)

[OAR 581-022-0705](#)

[SB 321 \(2015\)](#)

Illegal Immigration and Immigration Reform Act of 1996, 8 U.S.C. §§ 1101, 1221, 1252, 1324, 1363, 1367 (2006).

McKinney-Vento Homeless Education Assistance Improvements Act of 2001, 42 U.S.C. §§ 11431-11435 (2006).

9/28/07 | 1/14/16 | KPPH

# Oregon School Boards Association Selected Sample Policy

Code: **JEC**  
Adopted: **Not Recommended; Rec. V.2**

## **Admissions\*\*** (Version 3)

The Board is committed to providing an educational program for all students living in the district. The Board believes all students living in the district who have not completed 12 years of education should attend school regularly full-time and be included in the available educational programs.

### **Special Education**

Special education students shall be served from ages 0 to 21, unless the student has received a regular high school diploma.

### **Nonspecial Education**

Students not needing special education shall be served from between ages 5 and 19 or may be served until age 21 if the student is still working toward a diploma.

State law requires a student to be age six whose sixth birthday is on or before September 1 to enter first grade enrollment in a public school; and recognizes a student who is age five on or before September 1 to enter kindergarten age.

All new students must register in the school office. Registration requirements include proof of the student's birth date (a birth certificate, a hospital record or a baptismal record) and immunization records as required by law. Students admitted to any grade must show evidence of completing the prior school years.

Students enrolled in the district shall comply with Oregon laws related to age, residence, health, attendance and immunization.

Students located in the district shall not be excluded from admission solely because the student does not have a fixed place of residence or solely because the student is not under the supervision of a parent.

### **Admission of Resident Students**

School-age students who live within the district attendance area may attend school without paying tuition.

1. Residents over age 19 may be admitted with the approval of the superintendent and upon payment of tuition at the rate established by the Board. Students who turn 19 years of age during the school year shall continue to be eligible for a free and appropriate public education for the remainder of the school year.
2. The Board may admit otherwise eligible students who are not receiving special education and who have not yet attained 21 years of age prior to the beginning of the current school year if they are

shown to be in need of additional education in order to receive a diploma. These students may attend school without paying tuition for the remainder of the school year.

3. The Board shall admit otherwise eligible students who have not yet attained age 21 prior to the beginning of the current school year, if the student is receiving special education services and:
  - a. Has not yet received a regular high school diploma; or
  - b. Has received a modified diploma, an extended diploma or an alternative certificate.

A Sstudents living in the district who havehas attained the age of majority are is considered a residents of the district.

A Mminor students living with a parents who resides in the district areis considered a residents of the district.

A Sstudents who are is a wards of the court and who areis placed in the district are is a residents of the district.

Final determination on any remaining questions of residency of a student shall be made by the State Superintendent of Public Instruction.

END OF POLICY

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**Legal Reference(s):**

[ORS 109.056](#)  
[ORS 327.006](#)  
[ORS 336.092](#)  
[ORS 339.010](#)  
[ORS 339.020](#)

[ORS 339.030](#)  
[ORS 339.115](#)  
[ORS 339.125](#)  
[ORS 339.133](#)  
[ORS 339.134](#)

[ORS 433.267](#)  
[OAR 581-022-0705](#)  
SB 321 (2015)

Assistance to States for the Education of Children with Disabilities, 34 C.F.R. § 300.122 (2006).  
Illegal Immigration and Immigration Reform Act of 1996, 8 U.S.C. §§ 1101, 1221, 1252, 1324, 1363, 1367 (2006).  
McKinney-Vento Homeless Education Assistance Improvements Act of 2001, 42 U.S.C. §§ 11431-11435 (2006).  
2/16/12 | 1/14/16 | RSPH

# Oregon School Boards Association Selected Sample Policy

Code: **KL**  
Adopted: **Recommend Approval**

## Public Complaints\* (Version 1)

~~Although no~~ No staff, student, parent or community member will be denied the right to petition the Board for redress of a grievance, complaints will be referred through the proper administrative channels process for resolution before investigation or action by the Board. Exceptions are complaints that concern the superintendent or involve Board actions or Board operations.

The Board advises the public there is a proper channeling process for resolving complaints, including but not limited to concerns in the following areas:

1. Instruction;
2. Discipline;
3. Learning materials; or
4. Retaliation against a student or a student's parent who in good faith reported information that the student believes is evidence of a violation of state and federal law, rule or regulation.

Community members, staff, parents and students who have a complaint are encouraged to start at the lowest level in the organization to attempt to resolve the complaint.

~~Such complaints should be handled in the~~ The following order will be used unless otherwise identified (See administrative regulation KL-AR - Public Complaint Procedure for specific procedures and timelines):

5. Teacher/Employee;
6. Principal;
7. Superintendent;
8. Board.

Any complaint about school personnel other than the superintendent will be investigated by the administration before consideration and action by the Board. The Board will not hear complaints against employees in open a session open to the public unless an employee requests an open session.

Complaints against the principal may be filed with the superintendent.

Complaints against the superintendent should be referred to the Board chair on behalf of the Board. ~~[The Board may refer the investigation to a third party.]~~

Complaints against the Board as a whole or against an individual Board member should be made to the Board chair ~~and may be referred to district counsel~~ on behalf of the Board.

Complaints against the Board chair may be made directly to the ~~[district counsel]~~ [Board vice chair] on behalf of the Board.

The superintendent will develop and administer the general complaint process, as appropriate.

If a complaint alleges a violation of state standards or a violation of other statutory or administrative rule that the for which the State Superintendent of Public Instruction has appeal responsibilities, and the complaint is not resolved at the local level, the district will supply the complainant with appropriate information in order to file a direct appeal to the State Superintendent as outlined in Oregon Administrative Rules (OAR) 581-022-1940.

END OF POLICY

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**Legal Reference(s):**

[ORS 192.610 to -192.690](#)  
[ORS 332.107](#)

[OAR 581-022-1940](#)  
[OAR 581-022-1941](#)

House Bill (HB) 3371 (2015)

Anderson v. Central Point Sch. Dist., 746 F.2d 505 (9th Cir. 1984).  
Connick v. Myers, 461 U.S. 138 (1983).  
HR10/08/15/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **KL**  
Adopted: **Not Recommended; Rec. V.1**

## Public Complaints\* (Version 2)

[The district will develop and implement effective means of resolving concerns voiced by employees, students and the public in order to reduce potential areas of complaints, and to establish and maintain recognized channels of communication.]

[The Board advises the public that the proper channeling of process for resolving complaints is as follows:

1. Teacher/Employee;
2. Principal;
3. Superintendent;
4. Board.]

If your complaint addresses one or more of the issues identified below, you may use the complaint process available in any of the following policies and administrative regulations (AR):

1. Discrimination or harassment on any basis protected by law: Board policy AC, AC-AR;
2. Sexual harassment (staff): Board policy GBN, GBN-AR;
3. Sexual harassment (student): Board policy JBA, JBA-AR;
4. Hazing, harassment, intimidation, bullying, menacing or cyberbullying (staff): Board policy GBNA, GBNA-AR;
5. [Hazing,] [H][h]arassment, intimidation, bullying, [menacing,] cyberbullying, teen dating violence or domestic violence (student): Board policy JFCF, JFCF-AR;
6. Sexual conduct with a student: Board policy JHFF, JHFF-AR;
7. Instructional resources or instructional materials: Board policy IIA, IIA-AR;
8. Compliance with state standards: Board policy LGA, LGA-AR;
9. Complaints regarding the Talented and Gifted Program (TAG): Board policy IGBBC, IGBBC-AR.

Any complaint about school personnel other than the superintendent will be investigated by the administration before consideration and action by the Board. The Board will not hear complaints against employees in open a session open to the public unless an employee requests an open session.

A complaint of retaliation against a student or a student's parent who in good faith reported information that the student believes is evidence of a violation of state and federal law, rule or regulation, should be reported to the administrator.

Complaints against the principal may be filed with the superintendent.

Complaints against the superintendent should be referred to the Board chair on behalf of the Board. ~~{The Board may refer the investigation to a third party.}~~

Complaints against the Board as a whole or against an individual Board member should be made to the Board chair and may be referred to district counsel on behalf of the Board.

Complaints against the Board chair may be made directly to the [district counsel] [Board vice chair] on behalf of the Board.

The superintendent will develop and administer the general complaint process, as appropriate.

If a complaint alleges a violation of state standards or a violation of other statutory or administrative rule that the for which the State Superintendent of Public Instruction has appeal responsibilities, and the complaint is not resolved at the local level, the district will supply the complainant with appropriate information in order to file a direct appeal to the State Superintendent as outlined in Oregon Administrative Rules (OAR) 581-022-1940.

END OF POLICY

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**Legal Reference(s):**

[ORS 192.610 to -192.690](#)  
[ORS 332.107](#)

[OAR 581-022-1940](#)  
[OAR 581-022-1941](#)

House Bill (HB) 3371 (2015)

Anderson v. Central Point Sch. Dist., 746 F.2d 505 (9th Cir. 1984).

Connick v. Myers, 461 U.S. 138 (1983).

HR-08/15 | 1/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **KL**  
Adopted: **Not Recommended; Rec. v.1**

## Public Complaints\* (Version 3)

Members of the public, parents, staff and students are encouraged to make their concerns known to the district and to give the district an opportunity to review those concerns and respond to them. Complaints about instructional materials, staff members, alleged violation of state standards or retaliation against a student or a student's parent who in good faith reported information that the student believes is evidence of a violation of state and federal law, rule or regulation, ~~should be dealt with first at the local school.~~ ~~Persons having complaints~~ should approach the principal and, if possible, resolve the problems at this level.

Complaints about Board policy or administrative regulations should be referred directly to the superintendent.

Complaints against the principal may be filed with the superintendent.

Complaints against the superintendent should be referred to the Board chair ~~on behalf of the Board.~~ ~~[The Board may refer the investigation to a third party.]~~

Complaints against the Board as a whole or against an individual Board members should be made to the Board chair ~~and may be referred to district counsel~~ ~~on behalf of the Board.~~

Complaints against the Board chair may be made directly to the [district counsel] [Board vice chair] ~~on behalf of the Board.~~

When a complaint is made directly to the Board or to an individual Board member, it will generally be referred to the superintendent for evaluation and possible investigation. A Board member shall not attempt to consider such complaints in any official capacity acting as an individual Board member.

If the person(s) having a complaint fails to resolve the concern with the principal or the superintendent, the person may request that the matter be referred to the Board. If the Board deems it advisable, it may provide for a hearing of the complaint at an official meeting of the Board.

The superintendent shall develop administrative regulations designed to encourage the timely resolution of public complaints while providing a system of review which will allow both the complainant and other affected parties an opportunity to be heard.

If a complaint alleges a violation of state standards or a violation of other statutory or administrative rule that the for which the State Superintendent of Public Instruction has appeal responsibilities, and the complaint is not resolved at the local level, the district will supply the complainant with appropriate information in order to file a direct appeal to the State Superintendent as outlined in Oregon Administrative Rules (OAR) 581-022-1940.

END OF POLICY

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**Legal Reference(s):**

[ORS 192.610 to -192.690](#)  
[ORS 332.107](#)

[OAR 581-022-1940](#)  
[OAR 581-022-1941](#)

House Bill (HB) 3371 (2015)

Anderson v. Central Point Sch. Dist., 746 F.2d 505 (9th Cir. 1984).  
Connick v. Myers, 461 U.S. 138 (1983).  
HR-10/08/15 1/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **KL**  
Adopted: **Not Recommended; Rec. V.1**

## Public Complaints\* (Version 4)

(This version of sample policy KL **does not** need an accompanying administrative regulation, it is a stand-alone policy.  
If this policy is chosen by the Board, delete any existing KL-AR.)

Board members recognize that complaints about schools ~~will~~ **may** be voiced by employees, students, parents and ~~patrons~~ **community members** from time-to-time. When such complaints are made to a Board member, the Board member shall refer the person making the complaint to the superintendent or designee. A Board member shall not attempt to respond, review, handle or resolve such complaints as the individual board member has no authority to do so.

A complaint of retaliation against a student or a student's parent who in good faith reported information that the student believes is evidence of a violation of state and federal law, rule or regulation, should be made to the superintendent. After ~~exhausting the local~~ **district** complaint process, the complainant may file an appeal with the State Superintendent of Public Instruction under Oregon Administrative Rule (OAR) 581-022-1940.

If the person making the complaint discusses the matter with the appropriate administrator, that administrator shall attempt to resolve the complaint or identify the reasons for not resolving the issue. In the event a complaint is not resolved within [10] working days at the building level, the complainant may file a written complaint with the superintendent. The superintendent will attempt to resolve the complaint. If the complaint remains unresolved within [10] working days of receipt by the superintendent, the complainant may request to place the complaint on the Board agenda at the next regularly scheduled or special Board meeting. Any written complaint bearing the signature of a ~~district patron~~ **complainant**, and which is presented to the Board, may be considered by the entire Board. A final **written** decision regarding the complaint shall be made by the Board within [20] working days from receipt of the complaint. The written decision of the Board will include the legal basis for the decision, findings of facts and conclusions of law.<sup>1</sup>

Complaints against the principal may be filed with the superintendent.

Complaints against the superintendent should be referred to the Board chair on behalf of the Board. ~~[The Board may refer the investigation to a third party.]~~ The Board chair shall present the complaint to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide in open session what action, if any, is warranted.

Complaints against the Board as a whole or ~~against an~~ **individual** Board members should be made to the Board chair ~~and may be referred to district counsel~~ on behalf of the Board. The Board chair shall present the complaint to the Board. If the Board decides an investigation is warranted, Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide in open session what action, if any, is warranted.

<sup>1</sup>Timelines may be extended upon written agreement between both parties.

Complaints against the Board chair may be made directly to the [district counsel] [Board vice chair] on behalf of the Board. The [district counsel] [Board vice chair] shall present the complaint to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. Once the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide in open session what action, if any, is warranted.

Complaints alleging violation of state standards for public elementary and secondary schools shall be made in writing and presented to the superintendent. If a complaint alleging a violation of state standards or a violation of other statutory or administrative rule that the for which the State Superintendent of Public Instruction has appeal responsibilities, and the complaint is not resolved at the Board level, the district will supply the complainant with appropriate information in order to file a direct appeal to the State Superintendent as outlined in Oregon Administrative Rules (OAR 581-022-1940).

END OF POLICY

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**Legal Reference(s):**

[ORS 192.610 to -192.690](#)  
[ORS 332.107](#)

[OAR 581-022-1940](#)  
[OAR 581-022-1941](#)

House Bill (HB) 3371 (2015)

Anderson v. Central Point Sch. Dist., 746 F.2d 505 (9th Cir. 1984).  
Connick v. Myers, 461 U.S. 138 (1983).  
HR-10/08/15 1/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **KL-AR**  
Revised/Reviewed: **Recommend Approval**

## Public Complaint Procedure

### Initiating a Complaint: Step One

Any member of the public who wishes to express a complaint should discuss the matter with the school employee involved.

### The Administrator: Step Two

If the complainant is unable to resolve a problem or concern at step one, within [five] working days of the meeting with the employee, the complainant may file a written, signed complaint with the principal. The principal shall evaluate the **evidence complaint** and render a decision within [five] working days after receiving the complaint.

### The Superintendent: Step Three

~~If such a discussion with the principal~~ Step 2 does not resolve the complaint, within [10] working days of the meeting with the principal, the complainant, if he/she wishes to pursue the action, shall file a signed, written complaint with the superintendent clearly stating the nature of the complaint and a suggested remedy. (A form is available, but is not required.)

The superintendent shall investigate the complaint, confer with the complainant and the parties involved and prepare a written report of his/her findings and his/her conclusion and provide the written report to the complainant within [10] working days after receiving the written complaint.

### The Board: Step Four

If the complainant is dissatisfied with the superintendent's findings and conclusion, the complainant may appeal the decision to the Board within [five] working days of receiving the superintendent's decision. The Board may hold a hearing to review the findings and conclusion of the superintendent, to hear the **complainant complaint** and to hear and evaluate ~~such any~~ other evidence as it deems appropriate. Generally all parties involved, including the school administration, will be asked to attend such meeting for the purposes of presenting additional facts, making further explanations and clarifying the issues.

The Board may elect to hold the hearing in executive session if the subject matter qualifies under Oregon Revised Statutes.

The complainant shall be informed of the Board's decision within [20] working days from the hearing of the appeal by the Board. The Board's decision will be final.<sup>1</sup>

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<sup>1</sup>The timelines may be extended upon written agreement between both parties.

~~The complaint procedure set out above will not be longer than 90 days from the filing date of the original complaint with the principal.~~

Complaints against the principal may be filed with the superintendent.

Complaints against the superintendent should be referred to the Board chair on behalf of the Board. ~~The Board may refer the investigation to a third party.~~ The Board chair shall present the complaint to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide in open session what action, if any, is warranted.

Complaints against the Board as a whole or against an individual Board member should be made to the Board chair ~~and may be referred to district counsel~~ on behalf of the Board. The Board chair shall present the complaint to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide in open session what action, if any, is warranted.

Complaints against the Board chair may be made directly to the ~~district counsel~~ Board vice chair on behalf of the Board. The ~~district counsel~~ Board vice chair shall present the complaint to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide in open session what action, if any, is warranted.

If a complaint alleges a violation of state standards or a violation of other statutory or administrative rule ~~that the~~ for which the State Superintendent of Public Instruction has appeal responsibilities, and the complaint is not resolved at the Board level, the district will supply the complainant with appropriate information ~~in order~~ to file a direct appeal to the State Superintendent as outlined in Oregon Administrative Rule (OAR) 581-022-1940.

[ ] District  
COMPLAINT FORM

TO:  District Office  \_\_\_\_\_ (Name of School)

Person Making Complaint \_\_\_\_\_

Telephone Number \_\_\_\_\_ Date \_\_\_\_\_

Nature of Complaint \_\_\_\_\_

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Who should we talk to and what evidence should we consider? \_\_\_\_\_

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Suggested solution/resolution/outcome: \_\_\_\_\_

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Office Use: Disposition of Complaint:

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Signature: \_\_\_\_\_ Date: \_\_\_\_\_

cc: District Office

HR10/08/151/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: **LBE-AR**  
Revised/Reviewed: **Recommend Approval**

## Public Charter Schools

### 1. Definitions

- a. “Applicant” means any person or group that develops and submits a written proposal for a public charter school to the district.
- b. “Public charter school” means an elementary or secondary school offering a comprehensive instructional program operating under a written agreement entered into between the district and an applicant.
- c. “Virtual public charter school” means a public charter school that provides online courses, but does not primarily serve students in a physical location.
  - (1) For the purpose of this definition, an “online course” is a course in which instruction and content are delivered on a computer using the internet, other electronic network or other technology such as CDs or DVDs; the student and teacher are in different physical locations for the majority of instructional time; the student is not required to be in a physical location of a school while participating in the course; and the online instruction is integral to the academic program of the charter school.
  - (2) For the purpose of this definition, “primarily serving students in a physical location” means that more than 50 percent of the core courses offered are not online courses; more than 50 percent of the total number of students attending the school are not receiving instructional services in an online course; and more than 50 percent of the school’s required instructional hours are not through an online course.
- d. “Remote and necessary school district” means a school district that offers kindergarten through grade 12 and has: (a) an average daily membership (ADM), as defined in Oregon Revised Statute (ORS) 327.006, in the prior fiscal year of less than 110; and (b) a school that is located, by the nearest traveled road, more than 20 miles from the nearest school or from a city with a population of more than 5,000.
- e. “Sponsor” means the district Board.

### 2. Proposal Process

- a. The public charter school applicant shall submit the proposal to the district no later than ~~180 days prior to the proposed starting date~~ ~~[by the date determined by the district]~~ ~~[March 31]~~<sup>1</sup>.

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<sup>1</sup>The date shall be at least 180 days prior to the date that the public charter school would begin operating and give a reasonable period of time for the school district board to complete the approval process and the public charter school to begin operating by the beginning of the school year.

- b. To be considered complete, the proposal for a public charter school shall include the following:
- (1) The identification of the applicant;
  - (2) The name of the proposed public charter school;
  - (3) A description of the philosophy and mission of the public charter school [and how it differs from the district's current program and philosophy];
  - (4) A description of any distinctive learning or teaching techniques to be used;
  - (5) A description of the curriculum of the public charter school;
  - (6) A description of the expected results of the curriculum and the verified methods of measuring and reporting results that will allow comparisons with district schools;
  - (7) The governance structure [public charter school board membership, selection, duties and responsibilities];
  - (8) The projected enrollment including the ages or grades to be served;
  - (9) The target population of students the public charter school is designed to serve;
  - (10) The legal address, facilities and physical location of the public charter school [and applicable occupancy permits and health and safety approvals];
  - (11) A description of admission policies and application procedures;
  - (12) The statutes and rules that shall apply to the public charter school;
  - (13) The proposed budget and financial plan including evidence that the proposed budget and financial plan are financially sound;
  - (14) A financial management system that includes:
    - (a) A description of a financial management system for the public charter school. The financial management system must include a budget and accounting system that:
      - (i) Is compatible with the budget and accounting system of the sponsor of the school; and
      - (ii) Complies with the requirements of the uniform budget and accounting system adopted by the State Board of Education under Oregon Administrative Rule (OAR) 581-023-0035.
    - (b) A plan for having the financial management system in place at the time the school begins operating.
  - (15) The standards for behavior and the procedures for the discipline, suspension or expulsion of students;
  - (16) The proposed school calendar, including the length of the school day and length of the school year;
  - (17) A description of the proposed school staff and required qualifications of teachers including a breakdown of professional staff who hold a valid teaching license issued by the Teacher Standards and Practices Commission (TSPC) and those who do not hold a license but are registered with the TSPC (At least one-half of the full-time equivalent teaching and administrative staff of the public charter school shall be licensed.);
  - (18) The date upon which the public charter school would begin operating;
  - (19) The arrangements for any necessary special education and related services for students with disabilities who qualify under the Individuals with Disabilities Education Act (IDEA) and special education or regular education and related services for students who qualify under Section 504 of the Rehabilitation Act of 1973 who may attend the public charter school;

- (20) Information on the manner in which community groups may be involved in the planning and development process of the public charter school;
- (21) The term of the charter;
- (22) The plan for performance bonding or insuring the public charter school, including buildings and liabilities;
- (23) A proposed plan for the placement of public charter school teachers, other employees and students upon termination or nonrenewal of a charter;
- (24) The manner in which the public charter school program review and fiscal audit will be conducted;
- (25) In the case of a district school's conversion to charter status, the following additional criteria must be addressed:
  - (a) The alternate arrangements for students who choose not to attend the public charter school and for teachers and other school employees who choose not to participate in the public charter school;
  - (b) The relationship that will exist between the public charter school and its employees including terms and conditions of employment.
- (26) The district will not complete the review required under ORS 338.055 of an application that does not contain the required components listed in ORS 338.045 (2)(a)-(y). A good faith determination of incompleteness is not a denial for purposes of requesting state board review under ORS 338.075;
- (27) In addition to the minimum requirements enumerated in ORS 338.045 (2)(a)-(y), the district, under ORS 338.045 (3), may require the applicant to submit any of the following information as necessary to add detail or clarity to the minimum requirements or that the Board considers relevant to the formation or operation of the public charter school:
  - (a) Curriculum, Instruction and Assessment
    - (i) Description of a curriculum for each grade of students, which demonstrates in detail alignment with Oregon's academic content standards;
    - (ii) Description of instructional goals in relationship to Oregon's academic content standards and benchmarks;
    - (iii) A planned course statement for courses taught in the program, including related content standards, course criteria, assessment practices and state required work samples that will be collected;
    - (iv) Documentation that reflects consideration of credits for public charter school course work a student may perform at any other public school;
    - (v) Explanation of grading practices for all classes and how student performance is documented;
    - (vi) Explanation of how the proposed academic program will be aligned with that of the district. (If an applicant is proposing an elementary level public charter school, please describe how the curriculum is aligned at each grade level with the district's curriculum, including an explanation of how a student in the public charter school will be adequately prepared to re-enter the district's public school system after completing the charter school's program.);
    - (vii) Description of the student assessment system, including how student academic progress will be measured at each grade level and any specific assessment instruments that will be used;

- (viii) Description of the plan for reporting student progress to parents, students and the community;
- (ix) Description of policies and procedures regarding diplomas and graduation;
- (x) Description of policies and practices for meeting the needs of students who are not successful in the regular program;
- (xi) Identification of primary instructional materials by publisher, copyright date, version and edition for each academic content area in each grade;
- (xii) Identification of major supplementary material in core academic content areas and the criteria for use with students;
- (xiii) Description of how the public charter school will meet the unique learning needs of students working above and below grade level, including but not limited to, talented and gifted students;
- (xiv) Description of how the public charter school staff will identify and address students' rates and levels of learning;
- (xv) Description of strategies the public charter school staff will use to create a climate conducive to learning and positive student engagement;
- (xvi) Documentation that demonstrates improvements in student academic performance over time (both individual and program/grade level) from any private alternative school operated by the public charter school applicant, if applicable;
- (xvii) Description of how teachers will utilize current student knowledge and skills to assist in the design of appropriate instruction;
- (xviii) Identification of how the public charter school will provide access to national assessments such as PSAT, SAT and ACT, if applicable;
- (xix) Description of parental involvement, content of planned meetings and how the school will adjust any meeting to meet the needs of working parents;
- (xx) Description of distance learning options available to students, including the grade levels and amount of instruction offered to students, if applicable.†

(b) State and Federal Mandates/Special Education

- (i) †Description of how the public charter school will meet any and all requirements of No Child Left Behind, which also specifically addresses adequate yearly progress (AYP) and the safe schools aspects of the law;
- (ii) Description of how the public charter school will collect AYP information on all subgroup populations in the school;
- (iii) Description of specific program information regarding curriculum and how specially designed instruction is delivered for special education students. (Include methodologies, data collection systems and service delivery models used.);
- (iv) Description of how the public charter school will serve the needs of talented and gifted students, including screening, identification and services;
- (v) Description of how the public charter school will deliver services and instruction to English Language Learners (ELL), including descriptions of curriculum, methodology and program accommodations;
- (vi) Description of how the public charter school will work with the district to comply with Section 504 accessibility requirements and nondiscrimination requirements in admissions and staff hiring;
- (vii) Explanation of how the public charter school will work with the district to implement Child Find requirements;

- (viii) Explanation of how the public charter school will work with the district to manage IDEA 2004 mandates regarding eligibility, individualized education program (IEP) and placement meetings;
  - (ix) Explanation of how the public charter school will work with the district in which the public charter school is located to implement accommodations and modifications contained in the IEP or Section 504 plan;
  - (x) Explanation of how the public charter school will work with the district to include parents in implementing IEPs;
  - (xi) Explanation of how the public charter school intends to work with the district in which the public charter school is located to provide special education services for eligible students.†
- (c) Teacher Certification
- (i) †Identification regarding the training and/or certification of staff, including areas of industry training, endorsements and the TSPC licensure;
  - (ii) Explanation of how the public charter school will meet the federal mandate of “highly qualified” teachers contained in No Child Left Behind;
  - (iii) Identification of which teachers are Oregon Proficiency-based Admission Standards System (PASS) trained by content areas and year of training or re-training, if applicable;
  - (iv) Explanation of how the public charter school will comply with the TSPC requirements for all staff, including all TSPC Oregon Administrative Rules pertaining to its staff.†
- (d) Professional Development
- (i) †Provide the public charter school’s plan for comprehensive professional development for all staff;
  - (ii) Identification of how the public charter school’s licensed staff will obtain their required Continuing Professional Development units for licensure renewal.†
- (e) Budget
- (i) †Explanation of projected budget item for the Public Employees Retirement System (PERS) contributions that would be required of the public charter school;
  - (ii) Description of planned computer and technology support;
  - (iii) Description of planned transportation costs, if applicable;
  - (iv) Explanation of projected budget items for teaching salaries and other personnel contracts;
  - (v) Explanation on facilities costs, including utilities, repairs, and rent;
  - (vi) Copies of municipal audits for any other public charter school operated by the public charter school applicant, if applicable.†
- (f) Policy
- †Copies of any policy that the public charter school intends to adopt:

- (i) Which address expectations of academic standards for students and transcripting of credits;
- (ii) On student behavior, classroom management, suspensions and expulsions, which must contain an explanation of how the charter school will handle a student expelled from another district for reasons other than a weapons violation;
- (iii) Regarding corporal punishment including descriptions;
- (iv) Regarding dispensing of medication to students who are in need of regular medication during school hours;
- (v) Regarding reviewing and selecting instructional materials;
- (vi) Regarding solicitation/advertising/fundraising by nonschool groups;
- (vii) Regarding field trips;
- (viii) Regarding student promotion and retention;
- (ix) Regarding student publications;
- (x) Regarding staff/student vehicle parking and use;
- (xi) Regarding diplomas and graduation, and also participation in graduation exercises;
- (xii) Regarding student/parent/public complaints;
- (xiii) Regarding visitors;
- (xiv) Regarding staff discipline, suspension or dismissal.†

(g) Other Information

- (i) †Plans for use of any unique district facilities including, but not limited to, gymnasiums, auditoriums, athletic fields, libraries, cafeterias, computer labs and music facilities;
- (ii) Plans for child nutrition program(s);
- (iii) Plans for student participation in extracurricular activities pursuant to Oregon School Activities Association and Board policy, regulations and rules;
- (iv) Plans for counseling services;
- (v) Explanation of contingency plans for the hiring of substitute professional and classified staff;
- (vi) Description of how the public charter school will address the rights and responsibilities of students;
- (vii) Description of how the public charter school will handle situations involving student, possession, use or distribution of illegal drugs, weapons, flammable devices and other items that may be used to injure others;
- (viii) Description of procedures on how the public charter school will handle disciplinary referrals and how they will impact student promotion and advancement;
- (ix) Copies of program reviews conducted by other school districts that may have referred students to another public charter school operated by the public charter school applicant, if applicable;
- (x) Description of the typical school day for a student, including a master schedule, related activities, breaks and extracurricular options;
- (xi) Description of how student membership will be calculated, including a description of the type of instruction and location of instruction that contributes to ADM;
- (xii) Documentation and description of how long most students remain in the program, and documentation of student improvement in academic

- performance, disciplinary referrals, juvenile interventions or any other disciplinary action while in the program;
- (xiii) Explanation of the legal relationship between the public charter school and any other public charter school, if applicable. (Please provide any contracts or legal documents that will create the basis of the relationship between the entities. Please also provide all financial audits and auditor's reports.);
  - (xiv) If a public charter school applicant is operating any other public charter school, documentation that the public charter school applicant has established a separate Oregon nonprofit corporation, legally independent of any other public charter school in operation;
  - (xv) If a public charter school applicant has not secured a facility at the time of submitting a public charter school proposal, a written and signed declaration of intent that states:

If given any type of approval (conditional or unconditional), the public charter school applicant promises to provide to the school district liaison, at least ~~sixty (60)~~ days before the intended date to begin operation of the public charter school, proof that it will be able to secure, at least ~~thirty (30)~~ days before the intended date to begin operation of the public charter school, a suitable facility, occupancy and safety permits and insurance policies with minimum coverages required by the school district in school board policy and administrative regulation LBE that sets forth the requirements and process for the school board in reviewing, evaluating and approving a public charter school.

If the public charter school applicant fails to provide proof of an ability to secure a facility and all necessary occupancy and safety permits and insurance that is required by the school district as a condition of approval by the due date, it will withdraw its application to begin operation of a public charter school for the upcoming school year.

By signing this document, I affirm that I am authorized to make the promises stated above on behalf of the public charter school applicant. I understand that failure to fulfill the conditions listed above will result

in an approval becoming void, and will automatically revoke any type of approval that the school board previously granted to the public charter school applicant.

Name \_\_\_\_\_

Date \_\_\_\_\_

On behalf of the [ADD APPLICANT'S NAME] †

The public charter school applicant will organize and label all information required in section 27 to correspond to the requested numbers.

- (28) Each member of the proposed public charter school's governing body must provide an acknowledgment of understanding of the standards of conduct and the liabilities of a director of a nonprofit organization in ORS 65.

### 3. Proposal Review Process

- a. †The superintendent may appoint an advisory committee to review public charter school proposals and submit a recommendation to the Board. The committee will consist of district representatives, community members and others as deemed appropriate.†
- b. Within 30 business days of receipt of a proposal, the district will notify the applicant as to the completeness of the proposal and identify the specific elements of the proposal that are not complete. The district shall provide the applicant with a reasonable opportunity to complete the proposal.
- c. Within 60 days after the receipt of a completed proposal that meets the requirements of law and the district, the Board shall hold a public hearing on the provisions of the public charter school proposal.
- d. The Board must evaluate a proposal in good faith using the following criteria:
  - (1) The demonstrated sustainable support for the proposal by teachers, parents, students and other community members, including comments received at the public hearing;
  - (2) The demonstrated financial stability of the proposed public charter school including the demonstrated ability of the school to have a sound financial management system that:
    - (a) Is in place at the time the school begins operating;
    - (b) Is compatible with the budget and accounting system of the sponsor of the school; and
    - (c) Complies with the requirements of the uniform budget and accounting system adopted by the State Board of Education under OAR 581-023-0035.
  - (3) The capability of the applicant in terms of support and planning to provide comprehensive instructional programs;
  - (4) The capability of the applicant in terms of support and planning to provide comprehensive instructional programs to students identified by the applicant as academically low achieving;
  - (5) The adequacy of the information provided as required in the proposal criteria;
  - (6) Whether the value of the public charter school is outweighed by any directly identifiable, significant and adverse impact on the quality of the public education of students residing in the district.††

‡A “directly identifiable, significant and adverse impact” is defined as an adverse loss or reduction in staff, student, program or funds that may reduce the quality of existing district educational programs. This may include, but not be limited to, the following current data as compared to similar data from preceding years:

- (a) Student enrollment;
- (b) Student teacher ratio;
- (c) Staffing with appropriately licensed or endorsed personnel;
- (d) Student learning and performance;
- (e) Specialty programs or activities such as music, physical education, foreign language, talented and gifted and English as a second language;
- (f) Revenue;
- (g) Expenditure for maintenance and upkeep of district facilities.‡

- (7) Whether there are arrangements for any necessary special education and related services;
- (8) Whether there are alternative arrangements for students, teachers and other school employees who choose not to attend or be employed by the public charter school if the public charter school is converting an existing district school;
- (9) The prior history, if any, of the applicant in operating a public charter school or in providing educational services.

- e. The Board must either approve or deny the proposal within 30 days of the public hearing.
- f. Written notice of the Board’s action shall be sent to the applicant. If denied, the notice must include the reasons for the denial with suggested remedial measures. The applicant may then resubmit the proposal. The Board must either approve or deny the resubmitted proposal within 30 days. The Board may, with good cause, request an extension in the approval process timelines from the State Board of Education.

#### 4. Terms of the Charter Agreement

- a. Upon Board approval of the proposal, the Board will become the sponsor of the public charter school. The district and the applicant must develop a written charter agreement, subject to Board approval, which shall act as the legal authorization for the establishment of the public charter school.
- b. The charter agreement shall be legally binding and must be in effect for a period of not more than five years but may be renewed by the district.
- c. The district and the public charter school may amend a charter agreement through joint agreement.
- d. It is the intent of the Board that the charter agreement be detailed and specific to protect the mutual interests of the public charter school and the district. The agreement shall incorporate the elements of the approved proposal and will address additional matters, statutes and rules not fully covered by law or the proposal that shall apply to the public charter school including, but not limited to, the following:

- (1) ‡Sexual harassment (ORS 342.700, 342.704);‡
- (2) ‡Pregnant and parenting students (ORS 336.640);‡
- (3) ‡Special English classes for certain children (ORS 336.079);‡
- (4) ‡Student conduct (ORS 339.250);‡
- (5) ‡Alcohol and drug abuse program (ORS 336.222);‡
- (6) ‡Student records (ORS 326.565);‡
- (7) ‡Oregon Report Card (ORS 329.115);‡

- (8) †Recovery of costs associated with property damage (ORS 339.270);†
- (9) †Use of school facilities (ORS 332.172);†
- (10) Employment status of public charter school employees:
  - (a) Public charter school law requires the following:
    - (i) Employee assignment to a public charter school shall be voluntary;
    - (ii) A public charter school or the sponsor of the public charter school may be considered the employer of any employees of the public charter school;
    - (iii) If the Board is not the sponsor of the public charter school, it shall not be the employer and shall not collectively bargain with the employees;
    - (iv) A public charter school employee may be a member of a labor organization or organize with other employees to bargain collectively. The bargaining unit may be separate from other bargaining units of the district;
    - (v) The public charter school governing body shall control the selection of employees at the public charter school;
    - (vi) The Board shall grant a leave of absence to any employee who chooses to work in the public charter school. The length and terms of the leave of absence shall be set by collective bargaining agreement or by Board policy; however, the length of leave of absence may not be less than two years unless:
      - 1) The charter of the public school is terminated or the public charter school is dissolved or closed during the leave of absence; or
      - 2) The employee and the Board have mutually agreed to a different length of time.
    - (vii) An employee of a public charter school operating within the district who is granted a leave of absence and returns to employment with the district shall retain seniority and benefits as an employee, pursuant to the terms of the leave of absence.
  - (b) The terms and conditions of employment addressed in the agreement may include, but not limited to, the following provisions:
    - (i) A proposed plan for the placement of teachers and other school employees upon termination or nonrenewal of the charter;
    - (ii) Arrangements for employees who choose not to be employed or participate in the public charter school, if a district school has been converted to a public charter school;
    - (iii) †Salary for professional staff or wages for classified staff;†
    - (iv) †Health benefits;†
    - (v) †Leaves, including timing, commencement and duration of leave; voluntary and involuntary termination and return to work; whether the leave is paid or unpaid; and a description of benefits upon termination of leave (i.e., same, similar or available position and salary schedule placement);†
    - (vi) †Work year;†
    - (vii) †Working hours;†
    - (viii) †Discipline and dismissal procedures;†
    - (ix) †Arrangements to secure substitutes;†

- (x) ~~{Arrangements to ensure that 50 percent of the total full-time equivalent teaching and administrative staff are licensed;}~~
  - (xi) ~~{Hiring practices;}~~
  - (xii) ~~{Evaluation procedures.}~~
- (11) Student enrollment, application procedures and whether the public charter school will admit nonresident students and on what basis:
- (a) Public charter school law requires the following:
    - (i) Student enrollment shall be voluntary. If the number of applicants exceeds the capacity, students shall be selected through a lottery process. An equitable lottery may incorporate a weighted lottery for historically underserved students. ~~{All resident applicants will have their names written on a uniform-sized card to be placed in a covered container. Names will be drawn individually until all available slots are filled. If slots remain after resident applicants are placed, the remaining slots may be filled by nonresident applicants using an identical process. The drawing shall be made in the presence of at least two employees of the public charter school and two employees of the district.}~~ If the public charter school has been in operation one or more years, priority enrollment will be given to those students who:
      - 1) Were enrolled in the public charter school the prior year;
      - 2) Have siblings who are presently enrolled in the public charter school and who were enrolled the prior year;
      - ~~3) <sup>2</sup>{Only when the public charter school is party to a cooperative agreement for the purpose of forming a partnership to provide educational services, reside in:
 
        - ~~a) The public charter school's sponsoring district; or~~
        - ~~b) A district which is a party to the cooperative agreement.}~~~~
        - ~~i) {OR}~~
      - 3) ~~<sup>2</sup>{Reside in the public charter school's sponsoring district or a district which is a party to a cooperative agreement with the sponsoring district.}~~
    - (ii) A public charter school may not limit student admission based on ethnicity, national origin, race, religion, disability, sex, sexual orientation, income level, proficiency in the English language or athletic ability but may limit admission within a given age group or grade level and may implement a weighted lottery for historically underserved students. Historically underserved students are at risk because of any combination of two or more factors including their race, ethnicity, English language proficiency, socioeconomic status, gender, sexual orientation, disability and geographic location.

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<sup>2</sup>[District should choose one of the options presented as "3)" above.]

(12) Transportation of students:

(a) Public charter school law requires the following:

- (i) The public charter school shall be responsible for providing transportation for its students and may negotiate with the district for the provision of transportation services;
- (ii) The district shall provide transportation for public charter school students pursuant to ORS 327.043. Resident public charter school students will be transported under the same conditions as students attending private or parochial schools located along or near established district bus routes. The district shall not be required to add or extend existing bus routes;
- (iii) Public charter school students who reside outside the district may use existing bus routes and transportation services of the district in which the public charter school is located;
- (iv) Any transportation costs incurred by the district shall be considered approved transportation costs.

(13) The plan for performance bonding or insuring the public charter school sufficient to protect the district. Documentation shall be submitted prior to agreement approval.

(a) ~~F~~Insurance<sup>3</sup>:

- (i) Commercial General Liability Insurance in an amount of not less than \$1,000,000 combined single limit per occurrence/\$3,000,000 annual aggregate covering the public charter school, the governing board, employees and volunteers against liability for damages because of personal injury, bodily injury, death or damage to property including the loss of use thereof. Coverage to include, but not limited to, contractual liability, advertisers' liability, employee benefits liability, professional liability and teachers' liability;
- (ii) Liability Insurance for Directors and Officers in an amount not less than \$1,000,000 each loss/\$3,000,000 annual aggregate covering the public charter school, the governing board, employees and volunteers against liability arising out of wrongful acts and employment practices. Continuous "claims made" coverage will be acceptable, provided the retroactive date is on the effective date of the charter;
- (iii) Automobile Liability Insurance in an amount not less than \$1,000,000 combined single limit covering the public charter school, the governing board, employees and volunteers against liability for damages because of bodily injury, death or damage to property, including the loss of use thereof arising out of the ownership, operation, maintenance or use of any automobile. The policy will include underinsured and uninsured motorist vehicle coverage at the limits equal to bodily injury limits;
- (iv) Workers' Compensation Insurance shall also be maintained pursuant to Oregon laws (ORS Chapter 656). Employers' liability insurance with limits of \$100,000 each accident, \$100,000 disease each employee and \$500,000 each policy limit;

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<sup>3</sup>Insurance requirements for individual public charter schools may vary and should be reviewed by legal counsel and an insurance representative.

- (v) Honesty Bond to cover all employees and volunteers. Limits to be determined by the governing board, but no less than \$25,000. Coverage shall include faithful performance and loss of moneys and securities;
  - (vi) Property Insurance shall be required on all owned or leased buildings or equipment. The insurance shall be written to cover the full replacement cost of the building and/or equipment on an “all risk of direct physical loss basis,” including earthquake and flood perils.
- (b) Additional requirements:
- (i) The district shall be an additional insured on commercial general and automobile liability insurance. The policies shall provide for a 90-day written notice of cancellation or material change. A certificate evidencing all of the above insurance shall be furnished to the district;
  - (ii) The public charter school shall also hold harmless and defend the district from any and all liability, injury, damages, fees or claims arising out of the operations of the public charter school operations or activities;
  - (iii) The district shall be loss payee on the property insurance if the public charter school leases any real or personal district property;
  - (iv) The coverage provided and the insurance carriers must be acceptable to the district.†
- e. If the district and the public charter school enter a cooperative agreement with other school districts for the purpose of forming a partnership to provide educational services, then the agreement must be incorporated into the charter of the public charter school.
- f. In addition to any other terms required to be in the charter agreement, a virtual public charter school must have in the charter of the school, a requirement that the school:
- (1) Monitor and track student progress and attendance; and
  - (2) Provide student assessments in a manner that ensures that an individual student is being assessed and that the assessment is valid.

## 5. Public Charter School Operation

- a. The public charter school shall operate at all times in accordance with the public charter school law, the terms of the approved proposal and the charter agreement.
- b. Statutes and rules that apply to the district shall not apply to the public charter school except the following, as required by law, shall apply:
  - (1) Federal law, including applicable provisions of the No Child Left Behind Act of 2001;
  - (2) ORS 30.260 to 30.300 (tort claims);
  - (3) ORS 192.410 to 192.505 (Public Records Law);
  - (4) ORS 192.610 to 192.690 (Public Meetings Law);
  - (5) ORS Chapters 279A, 279B and 279C (Public Contracting Code);
  - (6) ORS 326.565, 326.575 and 326.580 (student records);
  - (7) ORS 297.405 to 297.555 and 297.990 (Municipal Audit Law);
  - (8) ORS 181.534, 326.603, 326.607 and 342.223 (criminal records checks);
  - (9) ORS 336.840 (use of personal electronic devices);
  - (10) ORS 337.150 (textbooks);
  - (11) ORS 339.119 (considerations for educational services);
  - (12) ORS 339.141, 339.147 and 339.155 (tuition and fees);

- (13) ORS 342.856 (core teaching standards);
- (14) ORS 659.850, 659.855 and 659.860 (discrimination);
- (15) ORS Chapter 657 (Employment Department Law);
- (16) Health and safety statutes and rules;
- (17) Any statute or rule listed in the charter;
- (18) The statewide assessment system developed by the Oregon Department of Education (ODE) for mathematics, science and English under ORS 329.485 (2);
- (19) ORS 329.045 (academic content standards and instruction);
- (20) Any statute or rule that establishes requirements for instructional time;
- (21) ORS 339.250 (12) (prohibition of infliction of corporal punishment);
- (22) ORS 339.326 (notice concerning students subject to juvenile court petitions);
- (23) ORS 339.370, 339.372, 339.388 and 339.400 (reporting of suspected abuse of a child and sexual conduct, and training on prevention and identification of abuse and sexual conduct);
- (24) ORS 329.451 (diploma, modified diploma, extended diploma and alternative certificate standards);
- (25) Statutes and rules that expressly apply to public charter schools;
- (26) Statutes and rules that apply to special government body as defined in ORS 174.117, or public body as defined in ORS 174.109; and
- (27) ORS Chapter 338.

- c. The public charter school may employ as a teacher or administrator a person who is not licensed by the TSPC; however, at least one-half of the total full-time equivalent teaching and administrative staff at the public charter school shall be licensed by the commission, pursuant to ORS 342.135, 342.136 or 342.138.
- d. A board member of the school district in which the public charter school is located may not serve as a voting member of the public charter school's board, yet may serve in an advisory capacity.
- e. The public charter school shall participate in the PERS.
- f. The public charter school shall not violate the Establishment Clause of the First Amendment to the United States Constitution or Section 5, Article I of the Oregon Constitution, or be religion based.
- g. The public charter school shall maintain an active enrollment of at least 25 students, unless the public charter school is providing educational services under a cooperative agreement entered into for the purpose of forming a partnership to provide educational services.
- h. The public charter school may sue or be sued as a separate legal entity.
- i. The public charter school may enter into contracts and may lease facilities and services from the district, education service district, state institution of higher education, other governmental unit or any person or legal entity.
- j. The public charter school may not levy taxes or issue bonds under which the public incurs liability.
- k. The public charter school may receive and accept gifts, grants and donations from any source for expenditure to carry out the lawful functions of the school.
- l. The district shall offer a high school diploma, modified diploma, extended diploma, alternative certificate to any public charter school student located in the district who meets the district's and state's standards for a high school diploma, modified diploma, extended diploma, alternative certificate.
- m. A high school diploma, modified diploma, extended diploma, alternative certificate issued by a public charter school shall grant to the holder the same rights and privileges as a high school diploma, modified diploma, extended diploma, alternative certificate issued by a nonchartered public school.

- n. Upon application by the public charter school, the State Board of Education may grant a waiver of certain public charter school law provisions if the waiver promotes the development of programs by providers, enhances the equitable access by underserved families to the public education of their choice, extends the equitable access to public support by all students or permits high quality programs of unusual cost. This waiver request must specify the reasons the public charter school is seeking the waiver and further requires the public charter school to notify the sponsor if a waiver is being considered.

## 6. Virtual Public Charter School Operation

- a. In addition to the other requirements for a public charter school, a virtual public charter school must have:
  - (1) A plan for academic achievement that addresses how the school will improve student learning and meet academic content standards required by ORS 329.045;
  - (2) Performance criteria the school will use to measure the progress of the school in meeting the academic performance goals set by the school for its first five years of operation;
  - (3) A plan for implementing the proposed education program of the school by directly and significantly involving parents and guardians of students enrolled in the school and involving the professional employees of the school;
  - (4) A budget, business plan and governance plan for the operation of the school;
  - (5) An agreement that the school will operate using an interactive, Internet-based technology platform that monitors and tracks student progress and attendance in conjunction with performing other student assessment functions;
  - (6) An agreement to employ only licensed teachers who are highly qualified as described in the Federal No Child Left Behind Act of 2001;
  - (7) A plan that ensures:
    - (a) All superintendents, assistant superintendents and principals of the schools are licensed by the TSPC to administrate; and
    - (b) Teachers who are licensed to teach by the TSPC and who are highly qualified as described in the federal No Child Left Behind Act of 2001 teach at least 95 percent of the school's instructional hours.
  - (8) A plan for maintaining student records and school records, including financial records, at a designated central office of operations;
  - (9) A plan to provide equitable access to the education program of the school by ensuring that each student enrolled in the school:
    - (a) Has access to and use of a computer and printer equipment as needed;
    - (b) Is offered an Internet service cost reimbursement arrangement under which the school reimburses the parent or guardian of the student, at a rate set by the school, for the costs of obtaining Internet service at the minimum connection speed required to effectively access the education program provided by the school; or
    - (c) Has access to and use of computer and printer equipment and is offered Internet service cost reimbursement.
  - (10) A plan to provide access to a computer and printer equipment and the Internet service cost reimbursement as described in (8) above by students enrolled in the school who are from families that qualify as low-income under Title I of the federal Elementary and Secondary Education Act of 1965 (20 USC 6301 et. seq.);

- (11) A plan to conduct school-sponsored optional educational events at least six times each school year at locations selected to provide convenient access to all students in the school who want to participate;
  - (12) A plan to conduct biweekly meetings between teachers and students enrolled in the school, either in person or through the use of conference calls or other technology;
  - (13) A plan to provide opportunities for face-to-face meetings between teachers and students enrolled in the school at least six times each school year;
  - (14) A plan to provide written notice to both the sponsoring district and the district in which the student resides upon enrollment or withdrawal for a reason other than graduation from high school:
    - (a) If notice is provided due to enrollment, then the notice must include the student's name, age, address and school at which the student was formerly enrolled;
    - (b) If notice is provided due to withdrawal for a reason other than graduation from high school, then notice must include the student's name, age, address, reason for withdrawal (if applicable) and the name of the school in which the student intends to enroll (if known).
  - (15) An agreement to provide a student's education records to the student's resident school district or to the sponsor upon request of the resident school district or sponsor.
- b. The sponsor of a virtual public charter school or a member of the public may request access to any of the documents described in a. above.
  - c. If a virtual public charter school or the sponsor of a virtual public charter school contracts with a for-profit entity to provide educational services through the virtual public charter school, the for-profit entity may not be the employer of any employees of the virtual public charter school.
  - d. The following limitations apply:
    - (1) School board members of the virtual public charter school's sponsoring district may not be:
      - (a) An employee of the virtual public charter school;
      - (b) A member of the governing body of the virtual public charter school;
      - (c) An employee or other representative of any third-party entity with which the virtual public charter school has entered into a contract to provide educational services.
    - (2) Members of the governing body of the virtual public charter school may not be an employee of a third-party entity with which the virtual public charter school intends to enter or has entered into a contract to provide educational services;
    - (3) If a third-party entity contracts with a virtual public charter school to provide educational services to the school, then:
      - (a) No third-party entity's employee or governing board member may attend an executive session of the sponsoring district's school board;
      - (b) No virtual public charter school employee may promote the sale or benefits of private supplemental services or classes offered by the third-party entity;
      - (c) The educational services must be consistent with state standards and requirements;
      - (d) The virtual public charter school must have on file the third-party entity's budget for the provision of educational services, including itemization of:

- (i) The salaries of supervisory and management personnel and consultants who are providing educational or related services for a virtual public charter school in this state; and
- (ii) The annual operating expenses and profit margin of the third-party entity for providing educational services to a virtual public charter school in this state.

## 7. Charter Agreement Review

- a. The public charter school shall report at least annually on the performance of the school and its students to the State Board of Education and the district.
- b. The Board or designee shall visit the public charter school at least annually to assure compliance with the terms and provisions of the charter.
- c. The public charter school shall be audited annually in accordance with the Municipal Audit Law. After the audit, the public charter school shall forward a copy of the audit to ODE and the following to the sponsoring district:
  - (1) A copy of the annual audit;
  - (2) Any statements from the public charter school that show the results of operations and transactions affecting the financial status of the charter school during the preceding annual audit period for the school; and
  - (3) Any balance sheet containing a summary of the assets and liabilities of the public charter school and related operating budget documents as of the closing date of the preceding annual audit period for the school.
- d. The sponsoring district may request at any time an acknowledgment from each member of the public charter school governing body that the member understands the standards of conduct and liabilities of a director of a nonprofit organization.
- e. †The public charter school shall submit to the Board quarterly financial statements that reflect the school's financial operations. The report shall include, but not be limited to, revenues, expenditures, loans and investments.†

## 8. Charter School Renewal

- a. The first renewal of a charter shall be for the same time period as the initial charter. Subsequent renewals of a charter shall be for a minimum of five years but may not exceed 10 years.
- b. The Board and the public charter school shall follow the timeline listed below, unless a different timeline has been agreed upon by the Board and the public charter school:
  - (1) The public charter school shall submit a written renewal request to the Board for consideration at least 180 days prior to the expiration of the charter;
  - (2) Within 45 days after receiving a written renewal request from a public charter school, the Board shall hold a public hearing regarding the renewal request;
  - (3) Within 30 days after the public hearing, the Board shall approve the charter renewal or state in writing the reasons for denying charter renewal;
  - (4) If the Board approves the charter renewal, the Board and the public charter school shall negotiate a new charter within 90 days unless the Board and the public charter school agree to an extension of the time period. Notwithstanding the time period specified in the charter, an expiring charter shall remain in effect until a new charter is negotiated;

- (5) If the Board does not renew the charter, the public charter school may address the reasons stated for denial of the renewal and any remedial measures suggested by the Board and submit a revised request for renewal to the Board;
- (6) If the Board does not renew the charter based on the revised request for renewal or the parties do not negotiate a charter contract within the timeline established in this policy, the public charter school may appeal the Board's decision to the State Board of Education for a review of whether the Board used the process required by Oregon law in denying the charter renewal.
  - (a) If the State Board of Education finds that the Board used the appropriate process in denying the request for renewal, it shall affirm the decision of the Board. A public charter may seek judicial review of this order.
  - (b) If the State Board of Education finds that the Board did not use the appropriate process in denying the request for renewal, it shall order the Board to reconsider the request for renewal. If after reconsideration the Board does not renew the charter, the public charter school may seek judicial review of the Board's decision.
- (7) The Board shall base the charter renewal decision on a good faith evaluation of whether the public charter school:
  - (a) Is in compliance with all applicable state and federal laws;
  - (b) Is in compliance with the charter of the public charter school;
  - (c) Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the Board and the public charter school;
  - (d) Is fiscally stable and used the sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter agreement; and
  - (e) Is in compliance with any renewal criteria specified in the charter of the public charter school.
- (8) The Board shall base the renewal evaluation described above primarily on a review of the public charter school's annual performance reports, annual audit of accounts and annual site visit and review and any other information mutually agreed upon by the public charter school and the Board;
- (9) For purposes of this section, the phrase "good faith evaluation" means an evaluation of all criteria required by this section resulting in a conclusion that a reasonable person would come to who is informed of the law and the facts before that person.

## 9. Charter School Termination

- a. The public charter school may be terminated by the Board for any of the following reasons:
  - (1) Failure to meet the terms of an approved charter agreement or any requirement of ORS Chapter 338 unless waived by the State Board of Education;
  - (2) Failure to meet the requirements for student performance as outlined in the charter agreement;
  - (3) Failure to correct a violation of federal or state law;
  - (4) Failure to maintain insurance;
  - (5) Failure to maintain financial stability;

- (6) Failure to maintain, for two or more consecutive years, a sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter under ORS 338.065;
  - (7) Failure to maintain the health and safety of the students.
- b. If a public charter school is terminated by the Board for any reason listed in sections a. (1) through a. (7), the following shall occur:
- (1) The district shall give the public charter school a 60-day written notification of its decision;
  - (2) If the grounds for termination include failure to maintain financial stability or failure to maintain a sound financial management system, the sponsor and the public charter school may agree to develop a plan to correct deficiencies. The plan to correct deficiencies will follow the process as per ORS 338.105;
  - (3) The district shall state the grounds for termination and deliver notification to the business office of the public charter school;
  - (4) The public charter school may request a hearing by the district. The request must be made in writing and delivered to the business address of the sponsor;
  - (5) Within 30 days of receiving the request for a hearing, the sponsor must provide the public charter school with the opportunity for a hearing on the proposed termination;
  - (6) The public charter school may appeal the decision to terminate to the State Board of Education;
  - (7) If the public charter school appeals the decision to terminate to the State Board of Education, the public charter school will remain open until the State Board issues its final order;
  - (8) If the State Board's final order upholds the decision to terminate and at least 60 days have passed since the notice of intent to terminate was received by the public charter school, the district's sponsorship of the public charter school will terminate;
  - (9) The final order of the State Board may be appealed under the provision of ORS 183.484;
  - (10) Throughout the ORS 183.484 judicial appeals process the public charter school shall remain closed;
  - (11) If terminated or dissolved, assets of the public charter school purchased by the public charter school with public funds, shall be given to the State Board of Education.
- c. If the public charter school is terminated by the Board for any reason related to student health or safety as provided in section a. (7), the following shall occur:
- (1) If the district reasonably believes that a public charter school is endangering the health or safety of the students enrolled in the public charter school, the district may act to immediately terminate the approved charter and close the public charter school without providing the notice required in section b. (1);
  - (2) A public charter school closed due to health or safety concerns may request a hearing by the sponsor. Such a request must be made in writing and delivered to the business address of the district;
  - (3) Within 10 days of receiving the request for a hearing, the district must provide the public charter school with the opportunity for a hearing on the termination;
  - (4) If the district acts to terminate the charter following the hearing, the public charter school may appeal the decision to the State Board of Education;
  - (5) The State Board will hold a hearing on the appeal within 10 days of receiving the request;

- (6) The public charter school will remain closed during the appeal process unless the State Board orders the district not to terminate and to re-open the public charter school; and
  - (7) The final order of the State Board may be appealed under the provisions of ORS 183.484.
- d. If the public charter school is terminated, closed or dissolved by the governing body of the public charter school, it shall be done only at the end of a semester and with 180 days' notice to the district, unless the health and safety of the students are in jeopardy. Such notice must be made in writing and be delivered to the business address of the sponsor.

Assets of a terminated, closed or dissolved public charter school that were obtained with grant funds will be dispersed according to the terms of the grant. If the grant is absent any reference to ownership or distribution of assets of a terminated, closed or dissolved public charter school, all assets will be given to the State Board of Education for disposal.

#### 10. District Immunity

The district, members of the Board and employees of the district are immune from civil liability with respect to the public charter school's activities.

HR10/08/151/14/16 | PH

# Oregon School Boards Association Selected Sample Policy

Code: GCBDD/GDBDD  
Adopted: **Recommend Adoption**

## Sick Time\*

School employee includes all employees of a public school district or an education service district.

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

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

~~[A district employing 10 or more employees shall allow an eligible employee to access up to the amount of hours accrued or front loaded in the current fiscal year. 40 hours of paid sick time per year. [Paid sick time shall accrue at the rate of at least one hour of paid sick time for every 30 hours the employee works, or 1-1/3 hours for every 40 hours the employee works.] [Paid sick time of 40 hours shall be front loaded to an employee at the beginning of each year.]]~~

### **OR**

~~[A district employing less than 10 employees shall provide access for an eligible employee of at least 40 hours of unpaid sick time or unpaid time off. [Unpaid sick time or time off shall accrue at the rate of at least one hour of paid sick time for every 30 hours the employee works, or 1-1/3 hours for every 40 hours the employee works.] [Unpaid sick time or time off shall be front loaded to an employee at the beginning of each year.]]~~

Unless otherwise defined in employee contracts:

- Licensed full-time employees will be front loaded with 80 hours of sick time per year. This must be used in 4-hour blocks;
- Licensed less than full-time, half-time or less than half-time employees will be front loaded with no less than 56 hours of sick time per year. This must be used in 4 hour blocks;
- Licensed substitutes will accrue sick time at a rate of 1 hour per every 30 hours worked. This must be used in 4 hour blocks (OAR 839-007-0025 (7)) Licensed Substitutes must notify the School District 12 hours in advance of using any sick leave;
- Licensed full-time administrative staff will be front loaded with a minimum of ten (10) days sick time per year or equivalent one (1) day per month employed, whichever is greater. These hours may be used in one hour increments;
- Licensed less than full-time administrative staff will be front loaded with a minimum of ten (10) days sick time per year or equivalent one (1) day per month employed, whichever is greater. These hours may be used in one hour increments;

- Classified, regular full to half-time employees will be front loaded with a minimum of ten (10) days sick time per year or equivalent one (1) day per month employed, whichever is greater. These hours may be used in one hour increments;
- Classified substitutes will accrue sick time at the rate of 1 hour for every 30 hours worked. These hours may be used in 1 hour increments;
- Classified regular full-time confidential management employees will be front loaded with a minimum of ten (10) days sick time per year or equivalent one (1) day per month employed, whichever is greater. These hours may be used in one hour increments;
- Classified less than half-time employees will accrue sick time at the rate of 1 hour for every 21.75 hours worked. These hours may be used in 1 hour increments;
- Classified less than full-time to half-time confidential management employees will accrue sick time at the rate of 1 hour for every 21.75 hours worked. These hours may be used in 1 hour increments;
- Coaches who also work for the district in any other capacity will be front loaded with no less than 40 and a maximum of 96 hours of sick time dependent on the position held with the district. No additional pay will be received nor will the coaching stipend be reduced or increased for the use of sick time. If missing coaching time due to the use of sick time, a sick time use form must be completed and turned into the business office. These hours may be used in 1 hour increments;
- Coaches who do not work for the district in any other capacity, will be front loaded with 40 hours of sick time. No additional pay will be received nor will the coaching stipend be reduced or increased for the use of sick time. If missing coaching time due to the use of sick leave, a sick time use form must be completed and turned into the business office. These hours may be used in 1 hour increments.

~~The employees may carry up to 40 hours of unused sick time from one year to the subsequent year. [1An employee is limited to accruing no more than 80 hours of sick time] using no more than their front loaded or accrued amount of 40 hours of sick time in a year.]~~

Sick time shall be taken ~~[in hourly increments] [in minimum increments not to exceed four hours]~~ taken as previously defined by employee group and may be used for the employee's or a family member's<sup>2</sup> mental or physical illness, injury or health condition, need for medical diagnosis, care or treatment of a mental or physical illness, injury or health condition or need for preventive care, or for reasons consistent with the Family Medical Leave Act (FMLA) or OFLA. Sick time may also be used in the event of a public health emergency.

The use of sick time, **when used as defined in this policy**, may not lead to, or result in, an adverse employment action against the employee.

Sick time is accrued according to the fiscal calendar.

~~The district reserves the right [after [three] consecutive days of absence] Unless otherwise defined by the association contract, the district may, after 3 days, to require proof of personal illness or injury from an employee, including a medical examination by a physician chosen and paid for by the district. An employee refusing to submit to such an examination or to provide other evidence as required by the district, shall be subject to appropriate disciplinary action, up to and including dismissal.~~

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<sup>1</sup>If the district chooses to limit the accrual or usage, the district must choose language in the bracketed sentence and keep this sentence in policy.

<sup>2</sup>"Family member" is defined by the Oregon Family Leave Act (OFLA).

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

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

If the reason for sick time is a foreseeable absence, the district may require the employee to provide advance notice of their intention to use sick time within ~~10~~ days of the requested sick time, or as soon as practicable. When the employee uses sick time for a foreseeable absence, the employee shall take reasonable effort to schedule the sick time in a manner that does not unduly disrupt the operations of the district (e.g., grading deadlines, in-service training, **and** mandatory meetings).

If the reason for sick time is unforeseeable, such as an emergency, accident or sudden illness, the employee shall notify the district ~~consistent with the reporting time established by the district or~~ **at least 24 hours in advance or** as soon as practicable.

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

**Nothing in this policy impacts the districts sick leave obligation under Oregon Revised Statute (ORS) 332.507 or as defined in association contracts. This policy does not affect or refer to additional leaves addressed in association contracts.**

END OF POLICY

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**Legal Reference(s):**

[ORS 332.507](#)  
[ORS 342.545](#)

[ORS 342.610](#)  
[ORS 659A.150 to -659A.186](#)

SB 454 (2015)

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

Americans with Disabilities Act Amendments Act of 2008.  
R1/14/16 | PH

<b>Utility Cost Comparison Recap</b>					
July - May each fiscal year indicated					
	YTD	Usage	Amount	Avg. Price	Comments/Outliers
Lundy Heating Fuel	13-14	8,200	\$25,765	\$3.14	No additional purchases of heating fuel are expected for the remainder of this fiscal year.
	14-15	6,114	\$15,172	\$2.48	
	15-16	5,050	\$8,559	\$1.69	
Lowell Heating Fuel	13-14	13,300	\$41,708	\$3.14	Same as for Lundy.
	14-15	7,550	\$18,274	\$2.42	
	15-16	8,400	\$14,153	\$1.68	
Lundy Electricity	13-14	85,680	\$7,837		With west wing closed
	14-15	85,720	\$7,984		First year of Charter school in west wing
	15-16	84,000	\$7,866		
Lundy Café/PDC	13-14	19,132	\$1,801		
	14-15	22,002	\$2,159		
	15-16	26,612	\$2,563		Summer food program running
LHS Electricity	13-14	151,345	\$13,373		Prior to insulation
	14-15	126,819	\$11,805		After insulation
	15-16	112,471	\$10,387		Higher air conditioning due to hot summer/fall





**Lundy Elementary Electricity Costs**

Meter: 50288

Lundy Buildings excluding Cafeteria and Professional Development Center

Fiscal Year 2013-14			Fiscal Year 2014-15			Fiscal Year 2015-16			Over/			
End date	Usage	Amount	YTD Amt	End date	Usage	Amount	YTD Amt	End date	Usage	Amount	YTD Amt	(Under)
8/14/2013	2,720	\$276.25	\$276.25	8/14/2014	5,000	\$483.99	\$483.99	8/16/2015	3,960	\$396.03	\$396.03	(\$87.96)
9/12/2013	4,960	\$470.00	\$746.25	9/15/2014	6,080	\$579.05	\$1,063.04	9/16/2015	6,240	\$597.19	\$993.22	(\$69.82)
10/14/2013	7,960	\$729.49	\$1,475.74	10/15/2014	7,720	\$723.42	\$1,786.46	10/16/2015	8,000	\$751.58	\$1,744.80	(\$41.66)
11/13/2013	9,480	\$860.96	\$2,336.70	11/15/2014	10,080	\$931.16	\$2,717.62	11/16/2015	8,280	\$776.14	\$2,520.94	(\$196.68)
12/12/2013	10,040	\$909.40	\$3,246.10	12/15/2014	10,520	\$969.90	\$3,687.52	12/16/2015	9,760	\$905.97	\$3,426.91	(\$260.61)
1/15/2014	11,320	\$1,020.12	\$4,266.22	1/14/2015	9,480	\$878.34	\$4,565.86	1/16/2016	9,240	\$860.35	\$4,287.26	(\$278.60)
2/12/2014	11,080	\$999.35	\$5,265.57	2/17/2015	11,000	\$1,012.15	\$5,578.01	2/16/2016	11,080	\$1,021.76	\$5,309.02	(\$268.99)
3/13/2014	10,560	\$954.38	\$6,219.95	3/15/2015	8,120	\$758.64	\$6,336.65	3/16/2016	10,160	\$941.06	\$6,250.08	(\$86.57)
4/14/2014	8,640	\$788.30	\$7,008.25	4/16/2015	9,280	\$860.74	\$7,197.39	4/16/2016	8,880	\$828.77	\$7,078.85	(\$118.54)
5/14/2014	8,920	\$829.06	\$7,837.31	5/16/2015	8,440	\$786.80	\$7,984.19	5/16/2016	8,400	\$786.67	\$7,865.52	(\$118.67)
6/16/2014	6,400	\$607.23	\$8,444.54	6/16/2015	7,520	\$709.47	\$8,693.66				\$7,865.52	
7/14/2014	6,080	\$579.05	\$9,023.59	7/16/2015	4,320	\$430.31	\$9,123.97				\$7,865.52	
Totals	98,160	\$9,023.59		Totals	97,560	\$9,123.97		Totals	84,000	\$7,865.52		
May YTD	85,680	\$7,837.31			85,720	\$7,984.19			84,000	\$7,865.52		

**Lundy Elementary Electricity Costs**  
 Meter: 71082  
 Lundy Cafeteria and Professional Development Center

Fiscal Year 2013-14			Fiscal Year 2014-15			Fiscal Year 2015-16			Over/ (Under)			
End date	Usage	Amount	YTD Amt	End date	Usage	Amount	YTD Amt	End date	Usage	Amount	YTD Amt	Over/ (Under)
8/14/2013	354	\$43.89	\$43.89	8/14/2014	1,341	\$133.07	\$133.07	8/16/2015	3,160	\$317.77	\$317.77	\$184.70
9/12/2013	1,648	\$152.80	\$196.69	9/15/2014	2,156	\$209.53	\$342.60	9/16/2015	2,876	\$289.81	\$607.58	\$264.98
10/14/2013	2,158	\$197.80	\$394.49	10/15/2014	2,361	\$229.06	\$571.66	10/16/2015	2,669	\$269.44	\$877.02	\$305.36
11/13/2013	2,160	\$193.57	\$588.06	11/15/2014	2,102	\$199.88	\$771.54	11/16/2015	2,504	\$247.74	\$1,124.76	\$353.22
12/12/2013	1,925	\$173.31	\$761.37	12/15/2014	2,479	\$234.99	\$1,006.53	12/16/2015	2,605	\$257.45	\$1,382.21	\$375.68
1/15/2014	1,837	\$175.21	\$936.58	1/14/2015	1,842	\$184.06	\$1,190.59	1/16/2016	2,329	\$240.71	\$1,622.92	\$432.33
2/12/2014	1,999	\$190.29	\$1,126.87	2/17/2015	2,374	\$235.23	\$1,425.82	2/15/2016	2,544	\$261.69	\$1,884.61	\$458.79
3/13/2014	2,238	\$212.55	\$1,339.42	3/15/2015	2,024	\$201.56	\$1,627.38	3/16/2016	2,691	\$229.45	\$2,114.06	\$486.68
4/14/2014	2,453	\$232.57	\$1,571.99	4/16/2015	2,688	\$265.43	\$1,892.81	4/16/2016	2,687	\$229.17	\$2,343.23	\$450.42
5/14/2014	2,360	\$228.96	\$1,800.95	5/16/2015	2,635	\$266.10	\$2,158.91	5/16/2016	2,547	\$219.49	\$2,562.72	\$403.81
6/16/2014	2,379	\$230.78	\$2,031.73	6/16/2015	2,934	\$295.52	\$2,454.43				\$2,562.72	
7/14/2014	1,430	\$140.88	\$2,172.61	7/16/2015	3,477	\$349.00	\$2,803.43				\$2,562.72	
Totals	22,941	\$2,172.61		Totals	28,413	\$2,803.43		Totals	26,612	\$2,562.72		
May YTD	19,132	\$1,800.95			22,002	\$2,158.91			26,612	\$2,562.72		

**Lowell High School Electricity Costs**

Meters: 61924, 70132, 61910, 50287

Includes: main building, modular classrooms, north wing classrooms and woodshop

Excludes: FB scoreboard, irrigation pump, wrestling room, field lights and bus barn

Fiscal Year 2013-14			Fiscal Year 2014-15			Fiscal Year 2015-16			Over/			
End date	Usage	Amount	YTD	End date	Usage	Amount	YTD	End date	Usage	Amount	YTD	(Under)
8/14/2013	4,310	\$419.91	\$419.91	8/14/2014	6,368	\$629.62	\$629.62	8/16/2015	5,350	\$566.00	\$566.00	(\$63.62)
9/12/2013	7,319	\$677.65	\$1,097.56	9/15/2014	8,318	\$809.66	\$1,439.28	9/16/2015	8,432	\$859.01	\$1,425.01	(\$14.27)
10/14/2013	11,688	\$1,041.62	\$2,139.18	10/15/2014	9,839	\$950.69	\$2,389.97	10/16/2015	14,991	\$1,416.00	\$2,841.01	\$451.04
11/13/2013	13,879	\$1,202.40	\$3,341.58	11/15/2014	11,715	\$1,092.63	\$3,482.60	11/16/2015	13,780	\$1,299.03	\$4,140.04	\$657.44
12/12/2013	25,651	\$2,218.25	\$5,559.83	12/15/2014	17,052	\$1,535.99	\$5,018.59	12/16/2015	15,072	\$1,414.11	\$5,554.15	\$535.56
1/15/2014	26,127	\$2,230.29	\$7,790.12	1/14/2015	16,851	\$1,521.91	\$6,540.50	1/16/2016	12,523	\$1,216.29	\$6,770.44	\$229.94
2/12/2014	25,481	\$2,196.18	\$9,986.30	2/18/2015	18,723	\$1,701.34	\$8,241.84	2/15/2016	12,432	\$1,221.62	\$7,992.06	(\$249.78)
3/13/2014	15,010	\$1,346.80	\$11,333.10	3/15/2015	11,494	\$1,074.23	\$9,316.07	3/16/2016	8,320	\$618.73	\$8,610.79	(\$705.28)
4/14/2014	12,092	\$1,106.98	\$12,440.08	4/16/2015	13,851	\$1,288.35	\$10,604.42	4/16/2016	10,843	\$894.20	\$9,504.99	(\$1,099.43)
5/14/2014	9,788	\$932.80	\$13,372.88	5/16/2015	12,608	\$1,200.56	\$11,804.98	5/16/2016	10,728	\$882.38	\$10,387.37	(\$1,417.61)
6/16/2014	6,927	\$691.18	\$14,064.06	6/16/2015	10,411	\$1,022.30	\$12,827.28				\$10,387.37	
7/14/2014	5,288	\$531.29	\$14,595.35	7/16/2015	4,971	\$528.43	\$13,355.71				\$10,387.37	
Totals	163,560	\$14,595.35		Totals	142,201	\$13,355.71		Totals	112,471	\$10,387.37		
May YTD	151,345	\$13,372.88			126,819	\$11,804.98			112,471	\$10,387.37		



**Bridge Charter Academy  
Financial Statement  
July 2016 - May 2016**

<b>Additional Authorized Building Expenses</b>								
James Heating	7,397.00					7,397.00	HVAC System	
James Heating	1,796.67					1,796.67	HVAC repairs	
Shaw Integrated Solutions	7,083.97					7,083.97	#2017 carpets and tile	
Shaw Integrated Solutions	1,725.39					1,725.39	Server room carpets and tile	
Shaw Integrated Solutions	6,284.33					6,284.33	#2005 carpets and tile	
Shaw Integrated Solutions	8,132.75					8,132.75	Back Middle room carpets and tile	
						0.00		
						0.00		
	32,420.11	0.00	0.00	0.00	0.00	32,420.11		

**Mountain View Charter School  
2015-16 General Fund Financial Summary**

May 31, 2016

	Budget	Actual: Jul-May		Projected: Jun		Projected for Year	Over/(Under) Budget		
<b>Resources</b>									
State School Fund	661,250	603,258	91.2%		0.0%	603,258	(57,992)	-9.6%	(1)
Donations	5,000	1,850	37.0%	10,990		12,840	7,840	61.1%	
Out of District Incentive	10,500	13,450	128.1%			13,450	2,950	21.9%	(2)
District Reimbursement		7,393		100		7,493	7,493		(3)
Fundraising		804				804	804		
Other		100				100	100		
Interest	50						(50)		
<b>Total Revenues</b>	<b>676,800</b>	<b>626,855</b>	<b>92.6%</b>	<b>11,090</b>	<b>1.6%</b>	<b>637,945</b>	<b>(38,855)</b>	<b>-6.1%</b>	
Beginning Fund Balance	40,000	15,691		-		15,691	(24,309)	-154.9%	
<b>Total Resources</b>	<b>716,800</b>	<b>642,547</b>	<b>89.6%</b>	<b>11,090</b>	<b>1.5%</b>	<b>653,637</b>	<b>(63,163)</b>	<b>-9.7%</b>	
<b>Requirements</b>									
Salaries	347,495	274,857	79.1%	84,602	24.3%	359,459	11,965	3.3%	(4)
Benefits	138,461	107,934	78.0%	34,210	24.7%	142,144	3,683	2.6%	(5)
Purchased Services	96,877	90,507	93.4%	7,864	8.1%	98,371	1,494	1.5%	(6)
Supplies and Materials	28,495	37,681	132.2%	350	1.2%	38,031	9,536	25.1%	(7)
Capital Outlay						-	-	-	
Other	5,250	5,171	98.5%	310	5.9%	5,481	231	4.2%	
Transfers						-	-		
<b>Total Expenditures</b>	<b>616,578</b>	<b>516,151</b>	<b>83.7%</b>	<b>127,336</b>	<b>20.7%</b>	<b>643,487</b>	<b>26,909</b>	<b>4.2%</b>	
Contingency/Carryover	100,222	126,395	126.1%	(116,246)	-116.0%	10,149	(90,072)		(8)
<b>Total Requirements</b>	<b>716,800</b>	<b>642,547</b>	<b>89.6%</b>	<b>11,090</b>	<b>1.5%</b>	<b>653,637</b>	<b>(63,163)</b>	<b>-9.7%</b>	

Notes:

- (1) Budget was based on a 115 students at \$5,750 each; paid for 109 at \$5,602 for 2015-2016; received a negative adj. for 2014-2015 of \$7,342.
- (2) District payment includes \$5,750 for 2014-15 and \$7,700 for 2015-16.
- (3) District reimbursement includes up to \$2,500 for advertising and \$5,000 for building supplies.
- (4) Projected salaries continue to run higher than budget mainly due to increased administrative hours worked (\$7,650).
- (5) Projected benefit savings are offset by unbudgeted health insurance premiums for August and September 2016 (\$6,700).
- (6) Includes attorney fees of \$8,000 not budgeted. Includes advertising to be reimbursed by the District up to \$2,500.
- (7) Includes unbudgeted but board approved Chromebooks for \$3,187. Includes spending reimbursed by the District of \$5,000.
- (8) Estimated carryover is 1.6%.

**Mountain View Charter School**  
**2015-16 Activity Fund Financial Summary**  
**May 31, 2016**

	<b>Budget</b>	<b>Actual: Jul-May</b>		<b>Projected: Jun</b>		<b>Projected for Year</b>	<b>Over/(Under) Budget</b>	
<b>Resources</b>								
Activity Fees	24,750	29,724		-		29,724	4,974	16.7%
<b>Total Revenues</b>	<b>24,750</b>	<b>29,724</b>		<b>-</b>		<b>29,724</b>	<b>4,974</b>	<b>16.7%</b>
Beginning Fund Balance	20,000	1,034				1,034		
<b>Total Resources</b>	<b>44,750</b>	<b>30,757</b>		<b>-</b>		<b>30,757</b>	<b>4,974</b>	<b>16.2%</b>
<b>Requirements</b>								
Salaries								
Benefits								
Purchased Services								
Supplies and Materials	24,750	23,194		7,425		30,619	5,869	19.2%
Capital Outlay								
Other		138				138	138	100.0%
Transfers								
<b>Total Expenditures</b>	<b>24,750</b>	<b>23,332</b>		<b>7,425</b>		<b>30,757</b>	<b>6,007</b>	<b>19.5%</b>
Contingency/Carryover	20,000	7,425		(7,425)		0	(1,034)	
<b>Total Requirements</b>	<b>44,750</b>	<b>30,757</b>		<b>-</b>		<b>30,757</b>	<b>4,974</b>	<b>16.2%</b>

**Mountain View Charter School**  
**2015-16 ODE Grant Fund Financial Summary**  
**May 31, 2016**

	<b>Budget</b>	<b>Actual: Jul-Jun</b>		<b>Projected: Jun</b>		<b>Projected for Year</b>	<b>Over/(Under) Budget</b>	
<b>Resources</b>								
Grant Funds		78,215		2,616		80,830	80,830	100.0%
<b>Total Revenues</b>	-	<b>78,215</b>		<b>2,616</b>		<b>80,830</b>	<b>80,830</b>	<b>100.0%</b>
Beginning Fund Balance								
<b>Total Resources</b>	-	<b>78,215</b>		<b>2,616</b>		<b>80,830</b>	<b>80,830</b>	<b>100.0%</b>
<b>Requirements</b>								
Salaries								
Benefits								
Purchased Services						-	-	#DIV/0!
Supplies and Materials		80,830				<b>80,830</b>	80,830	100.0%
Capital Outlay								
Other								
Transfers								
<b>Total Expenditures</b>	-	<b>80,830</b>		-		<b>80,830</b>	<b>80,830</b>	<b>100.0%</b>
Contingency/Carryover	-	(2,616)		2,616		-	-	
<b>Total Requirements</b>	-	<b>78,215</b>		<b>2,616</b>		<b>80,830</b>	<b>80,830</b>	<b>100.0%</b>

**Mountain View Charter School**  
**Parent Fundraising Fund Financial Summary**  
**May 31, 2016**

	Budget	Actual: Jul-Jun	Projected: Jun	Projected for Year	Over/(Under) Budget
<b>Resources</b>					
Donations		2,600		2,600	2,600 100.0%
<b>Total Revenues</b>	-	2,600	-	2,600	2,600 100.0%
Beginning Fund Balance					
<b>Total Resources</b>	-	2,600	-	2,600	2,600 100.0%
<b>Requirements</b>					
Salaries					
Benefits					
Purchased Services				-	- #DIV/0!
Supplies and Materials		278		278	278 100.0%
Capital Outlay					
Other					
Transfers					
<b>Total Expenditures</b>	-	278	-	278	278 100.0%
Contingency/Carryover	-	2,322	-	2,322	2,322
<b>Total Requirements</b>	-	2,600	-	2,600	2,600 100.0%

**Lowell School District #71**  
**2015-16 General Fund Financial Summary**  
**May 31, 2016**

	<b>Budget</b>	<b>Actual: Jul-May</b>	<b>Projected: Jun</b>	<b>Projected for Year</b>	<b>Budget Variance</b>	
					<b>\$</b>	<b>%</b>

**Resources**

State School Fund	3,052,000	2,991,687	(16,912)	2,974,775	(77,225)	-2.5%	(1)
Property Tax	940,800	925,958	35,734	961,692	20,892	2.2%	
Miscellaneous/Local Revenues	51,200	69,284	76,594	145,878	94,678	184.9%	(2)
Common School Funds	30,000	18,447	18,000	36,447	6,447	21.5%	
Rent	27,000	45,446	(13,925)	31,521	4,521	16.7%	
Business Services to Charter	20,000	18,335	1,665	20,000	-	0.0%	
Indirect Fees on Grants	5,000	5,206	1,700	6,906	1,906	38.1%	
County School Funds	5,000	2,535	-	2,535	(2,465)	-49.3%	
Facility & High Cost Disab. Grants	-	38,355	-	38,355	38,355	-	
Small High School Grant	-	16,209	-	16,209	16,209	-	(3)
Federal Forest Fees	-	17,285	-	17,285	17,285	-	(3)
<b>Total Revenues</b>	<b>4,131,000</b>	<b>4,148,747</b>	<b>102,856</b>	<b>4,251,603</b>	<b>120,603</b>	<b>2.9%</b>	
Beginning Fund Balance	284,000	260,479	-	260,479	(23,521)	-8.3%	
<b>Total Resources</b>	<b>4,415,000</b>	<b>4,409,226</b>	<b>102,856</b>	<b>4,512,082</b>	<b>97,082</b>	<b>2.2%</b>	

**Requirements**

Salaries	1,554,866	1,332,121	274,997	1,607,118	52,252	3.4%	
Benefits	1,005,960	775,701	172,968	948,669	(57,291)	-5.7%	
Purchased Services	389,550	362,640	67,033	429,673	40,123	10.3%	(4)
Supplies and Materials	203,550	237,371	8,516	245,887	42,337	20.8%	
Capital Outlay	4,800	43,133	-	43,133	38,333	798.6%	(5)
Other	84,450	93,538	800	94,338	9,888	11.7%	
Charter School Payments	652,000	624,101	-	624,101	(27,899)	-4.3%	
Transfer to Food Service Fund	10,314	-	10,000	10,000	(314)	-3.0%	
Transfer to Capital Projects Fund	-	-	132,768	132,768	132,768	-	(5)
Transfer to Athletics Fund	80,000	-	99,500	99,500	19,500	24.4%	
Transfer to Debt Service Fund	188,835	-	190,433	190,433	1,598	0.8%	
<b>Total Expenditures</b>	<b>4,174,325</b>	<b>3,468,605</b>	<b>957,015</b>	<b>4,425,620</b>	<b>251,295</b>	<b>6.0%</b>	
Contingency/Carryover	240,675	-	-	86,462	(154,213)	-64.1%	
<b>Total Requirements</b>	<b>4,415,000</b>	<b>3,468,605</b>	<b>957,015</b>	<b>4,512,082</b>	<b>97,082</b>	<b>2.2%</b>	

2015-16 Operating excess/(deficit) (43,325) (174,017)

Contingency/Ending Fund Balance 5.8% 2.0%

(1) Based on 282 District ADMr and 109 MVA ADMr.

Feb update: The most recent ODE estimate lowered the revenue by \$122,000 due to a decrease in the district's teacher experience factor in the formula and a decrease in per student funding state wide.

Apr update: The 14-15 reconciliation lowered the weighting for the IEP count above 11% of ADMr which resulted in a negative adjustment for last year. Based on this information, we also lowered our revenue estimate for 15-16.

(2) Includes \$5,000 donation for track renovation and \$33,000 for BCA start up expenses.

(3) After the budget was approved, legislative changes at the state and federal level extended funding for these programs.

(4) Includes architect services, tuition for special education students and home school charter consultant.

(5) Includes project expenditures for the announcer's booth, fencing, track renovation, scoreboard, wrestling room roof, concession windows/awning, dump trailer, painting, banners, bus radios and land acquisition.

**LOWELL ACTIVITY FUND 2015-16**  
**Balance Sheet**  
**As of May 31, 2016**

6TH GRADE CLASSROOM	204.46
AP ACTIVITIES	720.00
ASB	1,685.18
ATHLETICS	5,190.50
BASEBALL	-95.32
BOYS BASKETBALL	126.38
CAFETERIA	100.01
CLASS OF 2015	558.93
COMMUNITY ASSISTANCE FUND	398.19
CURRICULUM AND MATERIALS	1,875.03
DANCE CLUB	321.25
EDGERTON AROUND THE WORLD	6.70
FOOTBALL	824.68
FUNDRAISING OPERATIONS	1,992.91
FUTURE FARMERS OF AMERICA	998.50
GIRLS BASKETBALL	1,435.91
HONOR SOCIETY	455.43
JH SPORTS	1,739.32
JH STUDENT BODY	2,185.29
K-12 ASSEMBLIES	287.30
LHS DRAMA	1,486.05
LIBRARY FUND	574.28
LUNDY CLOTHES CLOSET	351.12
LUNDY ELEMENTARY	364.86
MUSIC	3,911.95
NEXUS WOODWORKING	4,528.91
PARENT TEACHER ORG. (PTO)	9,287.21
PLAYGROUND SUPPLIES	128.10
SCIENCE DEPARTMENT	108.78
SENIOR TRIP	178.41
SOFTBALL	381.31
TAG	391.23
TRACK	1,030.89
U of O cleanup-Academics	1,144.00
VOLLEYBALL	1,704.85
WEIGHT ROOM EQUIPMENT	77.72
WOODSHOP	1,514.06
WRESTLING	3,554.81
YEARBOOK LHS	-427.15
<b>Total BANNER BANK</b>	<b>51,302.04</b>