

Lowell School District

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

Board of Director's Meeting

October 27, 2014

Professional Development Center

6:00 pm - Executive Session

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

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

2.0 EXECUTIVE SESSION—Convene to Superintendent's Office Conference Room

- 2.1 Pursuant to ORS 192.660 (2) (d).
To conduct deliberations with persons designated by the governing body to carry on labor negotiations.
- 2.2 Pursuant to ORS 192.660 (2)(f)
To consider records exempt by law from public inspection.
- 2.3 Return to Public Session

3.0 OPENING OF PUBLIC SESSION

- 3.1 Public Session Call to Order
- 3.2 Pledge of Allegiance
 - 3.2.1 Lead by Chairman of the Board—Mr. McCallum
- 3.3 Attendance:
 - ___ Dennis McCallum, Chair
 - ___ Suzanne Kintzley, Vice-Chair
 - ___ Mike Galvin
 - ___ Leslie Brandt
 - ___ Jim Chapman
 - ___ Walt Hanline, Ed. D., Superintendent
 - ___ Kay Graham, Principal
 - ___ Marisa Owsley, Student Body Representative
 - ___ Michelle Stephens, Assistant to the Superintendent

3.4 Approval of Agenda – October 27, 2014

Recommended Action: Approval of Agenda

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

4.0 COMMUNITY/SCHOOL PRESENTATIONS

4.1 Presentation by Larry Sullivan and Rose Wilde regarding board issues relating to ESD and the Local Service Plan

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

5.0 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.*

6.0 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.*

6.1 Board Minutes from September 22, 2014 Board Meeting (Attachment)

6.2 Ratification of Employment (Attachment)

6.3 Check Register: 26042-26185 (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.0 ACTION DISCUSSION

7.1 Approval of 1.5% Salary Increase for all staff—Presented by Dr. Hanline (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.2 2nd Reading and Approval of OSBA updates—Presented by Dr. Hanline (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.3 Approval of Food Service Improvement Project—Presented Dr. Hanline and Mr. Hansen (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.4 Approval of Resolution 2014-15-3 for Capitol Government Financing—Presented by Dr. Hanline (Reference Attachments 7.3; Resolution document will be available at the Board Meeting)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.5 Approval of Job Description for Supervisor of Custodial/Painting Services—Presented by Dr.

Hanline (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.6 Approval of the appointment of Ben Silebi as Supervisor of Custodial/Painting Services—

Presented by Dr. Hanline (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.7 Approval of Stipend for Music Coach and Drama Coach—Presented by Dr. Hanline

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.8 Approval of Teacher Evaluation Handbook—Presented by Dr. Hanline (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.9 Approval of Revised Board Calendar—Presented by Dr. Hanline (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

7.10 Approval of the Application for District Visa cards through Siuslaw Bank—Referred by Ms. McNamara (Attachment)

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

8.0 INFORMATION AND STUDY

8.1 Report on Gear-up program and funding—Presented by Ms. Graham

8.2 Report on Data Works—Presented by Ms. Graham

8.3 Report on Debi McNamara's New Business Manager Institute Program and the OASBO and ASBO Professional development conference—Presented by Dr. Hanline (Attachment)

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

8.5 Student Body Representative Report—Presented by Ms. Owsley

8.6 Principal's Report—Presented by Ms. Graham

8.7 Superintendent's Report—Presented by Dr. Hanline

8.8 Board Members' Report

9.0 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

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

Board of Director's Meeting

September 22, 2014

Professional Development Center

5:30 pm - Walk through of Lowell High School

6:00 pm - Executive Session

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 OPENING BUSINESS

- 1.1 Call to Order
- 1.2 Walk through of Lowell High School
- 1.3 Public Comment on Executive Session Topics
- 1.4 Convene to Executive Session

2.0 EXECUTIVE SESSION—Convene to 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.

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

- 2.4 Return to Public Session

3.0 OPENING OF PUBLIC SESSION

- 3.1 Public Session Call to Order
- 3.2 Pledge of Allegiance
 - 3.2.1 Lead by Chairman of the Board—Mr. McCallum

3.3 Attendance:

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

3.4 Approval of Agenda – September 22, 2014

Recommended Action: Approval of Agenda

MOTION: _____ 2nd: _____ AYES: _____ NOES: _____ ABSTAIN: _____

4.0 **COMMUNITY/SCHOOL PRESENTATIONS**

4.1 Letter and donation from Community member Royd Foust (Attachment)

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

5.0 **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.*

6.0 **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.*

6.1 Board Minutes from August 25, 2014 Board Meeting (Attachment)

6.2 Ratification of Employment (Attachment)

6.3 Check Register: 25957-26041 (Attachment)

MOTION: Jim Chapman 2nd: Leslie Brandt AYES: 5 NOES: 0 ABSTAIN: 0

7.0 **ACTION DISCUSSION**

7.1 Approve Classified Salary Schedule—Presented by Dr. Hanline (Attachment)

MOTION: Suzanne Kintzley 2nd: Mike Galvin AYES: 5 NOES: 0 ABSTAIN: 0

7.2 Approve the Job Description for After School Assistant—Presented by Dr. Hanline (Attachment)

MOTION: Jim Chapman 2nd: Leslie Brandt AYES: 5 NOES: 0 ABSTAIN: 0

7.3 Approve the Job Description for After School Coordinator—Presented by Dr. Hanline (Attachment)

MOTION: Leslie Brandt 2nd: Mike Galvin AYES: 5 NOES: 0 ABSTAIN: 0

7.4 Approve the Athletic Coaches' Stipend Schedule—Presented by Dr. Hanline (Attachment)

There was discussion regarding coach's stipend being clarified as the position being at-will and the stipend is one time and not salary.

MOTION: Jim Chapman 2nd: Leslie Brandt AYES: 5 NOES: 0 ABSTAIN: 0

7.5 Approve the administrative recommendation on restoring and placing plaques and graduation pictures at Lowell High School—Presented by Dr. Hanline

A committee will convene to decide what the best option for displaying awards and graduation pictures.

No vote at this time.

7.6 Approve the Awarding of the Audit Contract—Presented by Dr. Hanline (Attachments)

Fiscal services (Debi McNamara and Maureen Weathers) completed a very thorough reference check on each of the final candidates. The recommendation is to contract Accuity for our Audit Services.

MOTION: Suzanne Kintzley 2nd: Leslie Brandt AYES: 5 NOES: 0 ABSTAIN: 0

7.7 Approve the Addendum to the contract between MVA and Lowell SD regarding Business Services and Student Services—Presented by Dr. Hanline (Attachment)

MOTION: Jim Chapman 2nd: Mike Galvin AYES: 5 NOES: 0 ABSTAIN: 0

7.8 Approve the Addendum to the contract between MVA and Lowell SD regarding the payment of utilities—Presented by Dr. Hanline (Attachment)

MOTION: Jim Chapman 2nd: Leslie Brandt AYES: 5 NOES: 0 ABSTAIN: 0

7.9 Approve the hiring of athletic coaches and assistants for High School and Junior High School—Presented by Dr. Hanline (Attachment)

**Suzanne Kintzley abstained from voting due to conflict of interest.

7.10

MOTION: Mike Galvin 2nd: Leslie Brandt AYES: 4 NOES: 0 ABSTAIN: 1

7.11 Approve Resolution 2014-15-2 for the lease-purchase agreement for the purpose of procuring "food service equipment"—Presented by Dr. Hanline (Attachments)

MOTION: Leslie Brandt 2nd: Mike Galvin AYES: 5 NOES: 0 ABSTAIN: 0 _____

8.0 INFORMATION AND STUDY

8.1 1st reading of OSBA Updates—Presented by Dr. Hanline (Attachments)

8.2 Update on building program—Presented by Dr. Hanline (Attachments)

- 8.3 Report on Instructional Hour Analysis of the district schools—Presented by Dr. Hanline
- 8.4 Information on Multi-funded employees—Presented by Dr. Hanline (Attachments)
- 8.5 Update on Educational and Student Services—Presented by Dr. Hanline (Handouts)
- 8.6 Report on Digitizing of Lowell School Board agendas, minutes, and budget—Presented by Ms. Stephens
- 8.7 Financial Report—Referred by Mr. Standridge (Attachment)
- 8.8 Student Body Representative Report—Presented by Ms. Owsley
- 8.9 Principals Report—Presented by Ms. Graham
- 8.10 Superintendent's Report—Presented by Dr. Hanline
- 8.11 Board Members' Report

9.0 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.

6.2	Name	Site	Position	Action	Salary	Effective
6.2a	Shanel Cantrell	Lundy Elementary	Lundy Librarian	New Hire	Step 1; Range 1-- .5FTE; 160 Days	10/4/14

Board Secretary Signature
Approved: October 27, 2014

SUNGARD PENTAMATION
DATE: 10/17/2014
TIME: 12:11:37

LOWELL SCHOOL DISTRICT #71
CHECK REGISTER - BY FUND

PAGE NUMBER: 1
ACCTPA21

SELECTION CRITERIA: transact.ck_date between '09/01/2014' and '09/30/2014'
ACCOUNTING PERIOD: 4/15

FUND - 100 - GENERAL FUND

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT
A101	26042	09/02/14	2390 SUZANNE KINTZLEY	1002321000000000	410	CELEBRATION SUPPLIE	0.00	155.07
A101	26044	09/03/14	2391 BRANDON L MORSE	100	R1990	REFUND OVERPAYMENT	0.00	20.00
A101	26048	09/03/14	2329 CDW GOVERNMENT	1002520000000000	470	ACCOUNTING SOFTWARE	0.00	465.88
A101	26048	09/03/14	2329 CDW GOVERNMENT	1001131000050000	480	CHROMEBOOKS	0.00	498.00
A101	26048	09/03/14	2329 CDW GOVERNMENT	1001131000050000	480	CHROMEBOOKS RETURN	0.00	-498.00
TOTAL CHECK							0.00	465.88
A101	26050	09/03/14	2180 CHAD CORWIN	1002552000000000	640	FIRST AID TRAINING	0.00	40.00
A101	26051	09/03/14	2382 COMPLIANCE SIGNS	1002543000000000	410	PARKING SIGNS	0.00	47.00
A101	26052	09/03/14	1914 HEYMAN'S SAFE, LOCK	1002542000000000	410	KEY BLANKS	0.00	45.50
A101	26053	09/03/14	1071 JERRY'S BUILDING MA	1002542000000000	410	BUILDING MAINTENANC	0.00	113.06
A101	26053	09/03/14	1071 JERRY'S BUILDING MA	1002542000000000	410	BUILDING MAINTENANC	0.00	138.90
TOTAL CHECK							0.00	251.96
A101	26054	09/03/14	1755 JUDY HAMPTON	1002120000000000	319	AUG GUIDANCE SVCS	0.00	540.00
A101	26055	09/03/14	2310 KAY GRAHAM	1002410000000000	410	STAFF BREAKFAST	0.00	59.93
A101	26055	09/03/14	2310 KAY GRAHAM	1002542000000000	410	CUSTODIAL SUPPLIES	0.00	13.59
A101	26055	09/03/14	2310 KAY GRAHAM	1002410000000000	410	STAFF MTG LUNCH	0.00	384.79
A101	26055	09/03/14	2310 KAY GRAHAM	1001131000180000	420	HS MATH TEXTBOOKS	0.00	665.20
A101	26055	09/03/14	2310 KAY GRAHAM	1002410000000000	410	STAFF MTG BREAKFAST	0.00	189.39
TOTAL CHECK							0.00	1,312.90
A101	26056	09/03/14	2394 LESLIE BRANDT	1002310000000000	340	BOARD CONF TRAVEL	0.00	67.76
A101	26058	09/03/14	2332 PEARL BUCK CENTER I	1002310000000000	410	BOARD NAME PLATE	0.00	9.25
A101	26059	09/03/14	2395 ROBERT BROOKE & ASS	1002542000000000	460	PARTITION	0.00	902.00
A101	26060	09/03/14	2370 SHERWIN-WILLIAMS	1002542000000000	410	PAINTING SUPPLIES	0.00	49.64
A101	26060	09/03/14	2370 SHERWIN-WILLIAMS	1002542000000000	410	PAINTING SUPPLIES	0.00	211.65
TOTAL CHECK							0.00	261.29
A101	26061	09/03/14	2389 TANYA BYRNE	1002552000000000	640	CDL PERMIT	0.00	23.50
A101	26062	09/03/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7299 CANCER A/T	0.00	6.00
A101	26062	09/03/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7309 A/F CANCER	0.00	53.90
A101	26062	09/03/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7301 A/F-CANCER	0.00	61.20
A101	26062	09/03/14	1701 AMERICAN FIDELITY A	100	L472.734	DED:7310 A/F ACCIDE	0.00	33.40
A101	26062	09/03/14	1701 AMERICAN FIDELITY A	100	L472.730	DED:7300 A/F-DSBLTY	0.00	24.00
TOTAL CHECK							0.00	178.50
A101	26063	09/03/14	1795 AMERICAN FIDELITY A	100	L472.076	DED:7111 TSA AM/FID	0.00	460.63
A101	26064	09/03/14	1710 AMERICAN FIDELITY A	100	L472.732	DED:7302 UNREMB MED	0.00	100.00
A101	26065	09/03/14	2321 AMERICAN FIDELITY H	100	L472.735	DED:7298 AM/FID HSA	0.00	280.56

SUNGARD PENTAMATION
DATE: 10/17/2014
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LOWELL SCHOOL DISTRICT #71
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SELECTION CRITERIA: transact.ck_date between '09/01/2014' and '09/30/2014'
ACCOUNTING PERIOD: 4/15

FUND - 100 - GENERAL FUND

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	-----DESCRIPTION----	SALES TAX	AMOUNT
A101	26066	09/03/14	1206 OREGON DEPARTMENT O	100	L472.099	DED:0099 OR.DEPT.RV	0.00	88.11
A101	26067	09/03/14	1052 OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	149.88
A101	26068	09/03/14	2342 TEXAS LIFE	100	L472.736	DED:7606 TEXAS LIFE	0.00	48.00
A101	26069	09/04/14	1022 U S BANK	1002520000000000	410	FINANCIAL ACCTG BOO	0.00	73.98
A101	26069	09/04/14	1022 U S BANK	1002542000000000	410	SANDWICH BOARD SIGN	0.00	286.97
TOTAL CHECK							0.00	360.95
A101	26070	09/04/14	1040 CITY OF LOWELL	1002542000000000	640	ANNOUNCER BOOTH PER	0.00	769.95
A101	26071	09/04/14	1040 CITY OF LOWELL	1002542000000000	640	CAFETERIA ROOF PERM	0.00	458.43
A101	26072	09/10/14	2149 CENTURY LINK-LONG D	1002542000000000	351	LONG DISTANCE SVCS	0.00	20.48
A101	26073	09/10/14	2396 FEI TESTING & INSPE	1002542000000000	640	INSPECT ELEM STRUCT	0.00	188.00
A101	26074	09/10/14	1004 AIRGAS NORPAC	1002542000000000	410	MAINT SUPPLIES	0.00	320.62
A101	26076	09/10/14	2336 BROTHERS PLUMBING	1002542000000000	322	ELEM BATHROOM REPAI	0.00	112.00
A101	26077	09/10/14	1031 CAROLINA BIOLOGICAL	1001131000120000	460	SCIENCE MICROSCOPES	0.00	2,246.50
A101	26078	09/10/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE SUPPLIES	0.00	32.30
A101	26080	09/10/14	1040 CITY OF LOWELL	1002542000000000	327	WATER/SEWER	0.00	787.26
A101	26081	09/10/14	1259 COASTWIDE LABORATOR	1002542000000000	460	CARPET EXTRACTOR	0.00	2,565.78
A101	26082	09/10/14	2382 COMPLIANCE SIGNS	1002543000000000	410	NO PARKING SIGNS	0.00	189.50
A101	26083	09/10/14	1138 COSA	1002240000000331	310	COSA ANNUAL DUES	0.00	1,290.00
A101	26084	09/10/14	2399 CPM EDUCATIONAL PRO	1001131000180000	420	MATH TEXTBOOKS	0.00	4,665.06
A101	26084	09/10/14	2399 CPM EDUCATIONAL PRO	1001131000180000	420	MATH TEXTBOOKS	0.00	477.00
TOTAL CHECK							0.00	5,142.06
A101	26085	09/10/14	1119 EARLY CHILDHOOD-CAR	1002190000320000	313	EVALUATION SERVICES	0.00	225.00
A101	26088	09/10/14	2278 EVERGREEN ROOFING	1002542000000000	322	INSTALL ELEM GUTTER	0.00	1,200.00
A101	26090	09/10/14	1157 GUARD PUBLISHING CO	1002520000000000	640	CTE TEACHER AD	0.00	166.65
A101	26091	09/10/14	1914 HEYMAN'S SAFE, LOCK	1002542000000000	410	LOCKS/KEYS	0.00	29.50
A101	26091	09/10/14	1914 HEYMAN'S SAFE, LOCK	1002542000000000	410	RE-KEY LOCKS	0.00	39.45
A101	26091	09/10/14	1914 HEYMAN'S SAFE, LOCK	1002554000000000	410	RE-KEY LOCK	0.00	13.00
A101	26091	09/10/14	1914 HEYMAN'S SAFE, LOCK	1002542000000000	410	KEY BLANKS	0.00	25.80
TOTAL CHECK							0.00	107.75
A101	26092	09/10/14	1750 I5-GLASS COMPANY	1002542000000000	410	TEMPERED GLASS	0.00	223.00

SUNGARD PENTAMATION
DATE: 10/17/2014
TIME: 12:11:37

LOWELL SCHOOL DISTRICT #71
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ACCOUNTING PERIOD: 4/15

FUND - 100 - GENERAL FUND

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	-----DESCRIPTION-----	SALES TAX	AMOUNT
A101	26093	09/10/14	2307 IMAGE KING SIGNS	1002542000000000	460	LUNDY & PDC SIGNS	0.00	2,455.00
A101	26094	V 09/10/14	1884 JASPER MOUNTAIN	1001281000000000	371	AUG INSTRUCTION	0.00	-1,395.00
A101	26094	V 09/10/14	1884 JASPER MOUNTAIN	1001281000000000	371	INSTRUCTION SERVICE	0.00	-4,410.00
A101	26094	09/10/14	1884 JASPER MOUNTAIN	1001281000000000	371	AUG INSTRUCTION	0.00	1,395.00
A101	26094	09/10/14	1884 JASPER MOUNTAIN	1001281000000000	371	INSTRUCTION SERVICE	0.00	4,410.00
TOTAL CHECK							0.00	0.00
A101	26095	09/10/14	1070 JERRY BROWN COMPANY	1002554000000000	411	VEHICLE FUEL	0.00	1,609.37
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002542000000000	410	MAINT SUPPLIES RETU	0.00	-56.60
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002543000000000	410	MAINT SUPPLIES	0.00	128.57
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002543000000000	410	MAINT SUPPLIES	0.00	49.98
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002543000000000	410	MAINT SUPPLIES	0.00	45.96
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002542000000000	410	MAINT SUPPLIES	0.00	190.51
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002542000000000	410	MAINT SUPPLIES	0.00	69.87
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002542000000000	410	MAINT SUPPLIES	0.00	319.46
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002542000000000	410	MAINT SUPPLIES	0.00	121.62
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002542000000000	410	MAINT SUPPLIES	0.00	50.13
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	1002542000000000	410	MAINT SUPPLIES	0.00	59.98
TOTAL CHECK							0.00	979.48
A101	26097	09/10/14	1945 JESSICA EDGERTON	1001111000000020	410	CLASSROOM SUPPLIES	0.00	25.00
A101	26098	09/10/14	2397 KATRINA BURKHARDT	1002240000000000	312	PROF DEV CLASS	0.00	600.00
A101	26100	09/10/14	2323 KENNETH DORSEY	1002554000000000	460	TOOLS	0.00	226.94
A101	26102	09/10/14	1334 LANE COMMUNITY COLL	1002574000000000	355	PRINT THE BRIDGE	0.00	267.70
A101	26104	09/10/14	1087 LANE EDUCATION SERV	1002230000000000	410	ESSENTIAL SKILLS	0.00	48.00
A101	26105	09/10/14	1644 LANE ELECTRIC COOPE	1002542000000000	325	ELECTRICITY	0.00	1,496.29
A101	26106	09/10/14	2317 LANE FOREST PRODUCT	1002542000000000	328	RECYCLING FEE	0.00	4.00
A101	26107	09/10/14	1792 MAUREEN WEATHERS	1002520000000000	353	POSTAGE STAMPS	0.00	4.90
A101	26108	09/10/14	2311 MICHELLE STEPHENS	1002321000000000	410	OFFICE SUPPLIES	0.00	119.98
A101	26109	09/10/14	2398 MOUNTAIN VIEW ACADE	1001288000000000	360	SEPT MVA PAYMENT	0.00	69,072.16
A101	26110	09/10/14	1196 NORTHWEST TEXTBOOK	1001131000180000	420	MATH TEXTBOOKS	0.00	1,289.91
A101	26112	09/10/14	2279 OFFICEMAX	1002410000000000	410	OFFICE SUPPLIES	0.00	1,418.24
A101	26112	09/10/14	2279 OFFICEMAX	1002410000000000	410	OFFICE SUPPLIES	0.00	21.42
TOTAL CHECK							0.00	1,439.66
A101	26114	09/10/14	1847 PACE	1002542000000000	653	PROPERTY INS ADD	0.00	15.00
A101	26115	09/10/14	2126 PACIFIC OFFICE AUTO	1002574000000000	355	HS COPIES	0.00	146.41

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT	
A101	26115	09/10/14	2126	PACIFIC OFFICE AUTO	1002574000000000	322	MOVE COPIER	0.00	200.00
A101	26115	09/10/14	2126	PACIFIC OFFICE AUTO	1002574000000000	322	COPIER SERVICE CALL	0.00	130.00
A101	26115	09/10/14	2126	PACIFIC OFFICE AUTO	1002574000000000	355	ELEM COPIES	0.00	22.70
TOTAL CHECK							0.00	499.11	
A101	26116	09/10/14	2015	RANDY DOAN	1002542000000000	410	PAINTING SUPPLIES	0.00	43.24
A101	26117	09/10/14	2167	SANIPAC	1002542000000000	328	GARBAGE SERVICE	0.00	115.70
A101	26117	09/10/14	2167	SANIPAC	1002542000000000	328	GARBAGE SERVICE	0.00	154.30
TOTAL CHECK							0.00	270.00	
A101	26119	09/10/14	1239	SECURITY ALARM CORP	1002542000000000	329	ALARM SERVICE	0.00	60.75
A101	26119	09/10/14	1239	SECURITY ALARM CORP	1002542000000000	329	ELEM ALARM SERVICE	0.00	49.75
A101	26119	09/10/14	1239	SECURITY ALARM CORP	1002542000000000	322	REPAIR SECURITY SYS	0.00	343.00
TOTAL CHECK							0.00	453.50	
A101	26120	09/10/14	2370	SHERWIN-WILLIAMS	1002542000000000	410	PAINTING SUPPLIES	0.00	158.58
A101	26120	09/10/14	2370	SHERWIN-WILLIAMS	1002542000000000	410	PAINTING SUPPLIES	0.00	197.50
TOTAL CHECK							0.00	356.08	
A101	26123	09/10/14	1269	UNIVERSITY OF OREGO	1002410000000000	640	HS SWIS LICENSE	0.00	300.00
A101	26123	09/10/14	1269	UNIVERSITY OF OREGO	1002410000000000	640	LUNDY SWIS LICENSE	0.00	300.00
TOTAL CHECK							0.00	600.00	
A101	26124	09/10/14	2301	WALT HANLINE	1002321000000000	640	PHONE FEES	0.00	131.48
A101	26124	09/10/14	2301	WALT HANLINE	1002321000000000	340	BUSINESS MTG MEALS	0.00	88.34
TOTAL CHECK							0.00	219.82	
A101	26125	09/12/14	1884	JASPER MOUNTAIN	1001281000000000	371	INSTRUCTION SVCS AU	0.00	900.00
A101	26125	09/12/14	1884	JASPER MOUNTAIN	1001281000000000	371	INSTRUCTION SVCS JU	0.00	4,500.00
TOTAL CHECK							0.00	5,400.00	
A101	26126	09/17/14	1230	CENTURY LINK	1002542000000000	351	TELEPHONE SERVICE	0.00	308.30
A101	26127	09/17/14	2376	2G CONSTRUCTION	1002542000000000	410	WEST WING MOULDING	0.00	138.60
A101	26128	09/17/14	2316	ABBAY BORKIN-RIUS	1002410000000000	410	COLLEGE GUIDES	0.00	85.80
A101	26129	09/17/14	2400	ALICIA OSBORN	1001111000000040	410	CLASSROOM SUPPLIES	0.00	150.63
A101	26130	09/17/14	2401	BLACKBOARD INC	1002661000000000	640	AUTO CALL SYSTEM	0.00	455.40
A101	26131	09/17/14	1032	CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE SUPPLIES	0.00	56.09
A101	26132	09/17/14	2146	CASCADE HEALTH SOLU	1002552000000000	640	DRIVER TESTS	0.00	297.00
A101	26134	09/17/14	2100	FERRELLGAS	1002542000000000	326	GROUNDS UPKEEP/FUEL	0.00	273.57
A101	26135	09/17/14	1070	JERRY BROWN COMPANY	1002554000000000	411	VEHICLE FUEL	0.00	2,169.73
A101	26136	09/17/14	1071	JERRY'S BUILDING MA	1002542000000000	410	PAINTING SUPPLIES	0.00	37.89

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT
A101	26137	09/17/14	1945 JESSICA EDGERTON	1002240000000000	312	GRADUATE LOAN	0.00	600.00
A101	26137	09/17/14	1945 JESSICA EDGERTON	1002572000000000	460	CLASSROOM FURNITURE	0.00	125.50
TOTAL CHECK							0.00	725.50
A101	26138	09/17/14	2402 JUDITH JONES	1002552000000000	640	FINGERPRINT CHRGS	0.00	25.00
A101	26139	09/17/14	2051 KAREN BRIST	1002130000000000	390	MEDICATION CLASS	0.00	300.00
A101	26140	09/17/14	2397 KATRINA BURKHARDT	1001111000000030	410	CLASSROOM SUPPLIES	0.00	155.78
A101	26141	09/17/14	2370 SHERWIN-WILLIAMS	1002542000000000	410	PAINTING SUPPLIES	0.00	30.00
A101	26144	09/24/14	1230 CENTURY LINK	1002542000000000	351	LONG DISTANCE PHONE	0.00	34.87
A101	26145	09/24/14	2263 ANTHONY NOLAN	1002543000000000	410	LAWN TREATMENTS	0.00	155.29
A101	26146	09/24/14	2016 BENJAMIN SILEBI	1002542000000000	410	CUSTODIAL SUPPLIES	0.00	33.17
A101	26146	09/24/14	2016 BENJAMIN SILEBI	1002542000000000	328	DUMP FEE	0.00	16.50
A101	26146	09/24/14	2016 BENJAMIN SILEBI	1002554000000000	411	TRUCK FUEL	0.00	50.00
TOTAL CHECK							0.00	99.67
A101	26147	V 09/24/14	2403 BRIAN BEARD	1001131000550000	420	WOODWORKING BOOKS	0.00	-44.94
A101	26147	V 09/24/14	2403 BRIAN BEARD	1001131000550000	460	WOODSHOP TOOLS	0.00	-172.60
A101	26147	V 09/24/14	2403 BRIAN BEARD	1001131000550000	460	WOODSHOP TOOLS	0.00	-251.69
A101	26147	V 09/24/14	2403 BRIAN BEARD	1002542000000000	410	BUILDING MAINT	0.00	-94.66
A101	26147	V 09/24/14	2403 BRIAN BEARD	1002542000000000	410	BUILDING MAINT	0.00	-19.28
A101	26147	09/24/14	2403 BRIAN BEARD	1001131000550000	460	WOODSHOP TOOLS	0.00	73.87
A101	26147	09/24/14	2403 BRIAN BEARD	1001131000550000	460	WOODSHOP TOOLS	0.00	-18.88
A101	26147	09/24/14	2403 BRIAN BEARD	1001131000550000	460	WOODSHOP TOOLS	0.00	172.60
A101	26147	09/24/14	2403 BRIAN BEARD	1001131000550000	420	WOODWORKING BOOKS	0.00	44.94
A101	26147	09/24/14	2403 BRIAN BEARD	1002542000000000	410	BUILDING MAINT	0.00	94.66
A101	26147	09/24/14	2403 BRIAN BEARD	1001131000550000	460	WOODSHOP TOOLS	0.00	251.69
A101	26147	V 09/24/14	2403 BRIAN BEARD	1002542000000000	410	BUILDING MAINT	0.00	19.28
A101	26147	09/24/14	2403 BRIAN BEARD	1001131000550000	460	WOODSHOP TOOLS	0.00	-73.87
TOTAL CHECK							0.00	18.88
A101	26148	09/24/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE MAINT	0.00	127.03
A101	26149	09/24/14	2404 CERES UNIFIED SCHOO	1002410000000000	340	FACILITY USE CHARGE	0.00	121.55
A101	26150	09/24/14	2038 CHEMSEARCH	1002542000000000	410	BOILER SUPPLIES	0.00	252.05
A101	26151	09/24/14	1259 COASTWIDE LABORATOR	1002542000000000	410	CUSTODIAL SUPPLIES	0.00	294.00
A101	26151	09/24/14	1259 COASTWIDE LABORATOR	1002542000000000	410	CUSTODIAL SUPPLIES	0.00	753.71
A101	26151	09/24/14	1259 COASTWIDE LABORATOR	1002542000000000	460	NUWAVE VACUUM	0.00	2,997.40
TOTAL CHECK							0.00	4,045.11
A101	26152	09/24/14	1914 HEYMAN'S SAFE, LOCK	1002542000000000	410	KEYS	0.00	7.00
A101	26153	09/24/14	1066 HUNGERFORD LAW FIRM	1002310000000000	382	AUG LEGAL FEES	0.00	99.84

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT
A101	26154	09/24/14	1071 JERRY'S BUILDING MA	1002542000000000	460	MAINTENANCE TOOLS	0.00	233.24
A101	26154	09/24/14	1071 JERRY'S BUILDING MA	1002542000000000	410	BUILDING MAINT	0.00	41.35
A101	26154	09/24/14	1071 JERRY'S BUILDING MA	1002542000000000	460	MAINTENANCE TOOLS	0.00	128.98
TOTAL CHECK							0.00	403.57
A101	26156	09/24/14	2324 L D ELLISON	1002554000000000	410	BUS AWARDS	0.00	32.00
A101	26156	09/24/14	2324 L D ELLISON	1002554000000000	640	DRIVER CDL - BYRNE	0.00	115.50
TOTAL CHECK							0.00	147.50
A101	26157	09/24/14	2312 LANE COUNTY SCHOOL	1002554000000000	322	VEHICLE REPAIR	0.00	352.30
A101	26158	09/24/14	1497 LOWELL SCHOOL DISTR	100	R1990	TRSFRR ACTIVITY FEES	0.00	1,203.39
A101	26159	09/24/14	2311 MICHELLE STEPHENS	1002321000000000	410	OFFICE SUPPLIES	0.00	238.75
A101	26160	09/24/14	1196 NORTHWEST TEXTBOOK	1001131000180000	420	MATH TEXTBOOKS	0.00	257.98
A101	26161	09/24/14	1202 OETC	1001131000050000	480	CAMERA/PROJECTOR	0.00	1,432.00
A101	26163	09/24/14	1211 OSBA	1002310000000000	640	2014-15 POLICY UPDA	0.00	1,695.00
A101	26164	09/24/14	1548 PACIFIC WINDS MUSIC	1001131000133000	410	MUSIC SUPPLIES	0.00	152.85
A101	26164	09/24/14	1548 PACIFIC WINDS MUSIC	1001131000133000	420	MUSIC BOOKS	0.00	39.80
A101	26164	09/24/14	1548 PACIFIC WINDS MUSIC	1001131000133000	322	INSTRUMENT REPAIRS	0.00	1,210.00
A101	26164	09/24/14	1548 PACIFIC WINDS MUSIC	1001131000133000	420	MUSIC BOOKS	0.00	45.90
A101	26164	09/24/14	1548 PACIFIC WINDS MUSIC	1001131000133000	410	MUSIC SUPPLIES	0.00	134.25
TOTAL CHECK							0.00	1,532.80
A101	26165	09/24/14	1220 PITNEY BOWES	1002410000000000	353	POSTAGE METER RENTA	0.00	72.33
A101	26166	09/24/14	2406 PNW SECURITY	1001131000050000	480	EXPAND DIST WIRELES	0.00	1,549.26
A101	26166	09/24/14	2406 PNW SECURITY	1001111000000000	480	EXPAND DIST WIRELES	0.00	3,098.54
TOTAL CHECK							0.00	4,647.80
A101	26167	09/24/14	2015 RANDY DOAN	1002554000000000	322	SERVICE TRUCK MAINT	0.00	28.78
A101	26170	09/24/14	1166 VERIZON	1002554000000000	351	BUS CELL PHONES	0.00	239.20
A101	26171	09/24/14	2301 WALT HANLINE	1002321000000000	340	BUSINESS MTG LUNCH	0.00	35.34
A101	26172	09/24/14	1623 WILLAMETTE ESD	1002321000000000	470	PENTAMATION SVCS	0.00	518.44
A101	26174	09/29/14	1002 AFLAC	100	L472.125	DED:8106 AFLAC P/A	0.00	144.98
A101	26174	09/29/14	1002 AFLAC	100	L472.125	DED:8010 AFLAC ACDN	0.00	65.39
A101	26174	09/29/14	1002 AFLAC	100	L472.125	DED:8011 AFLAC STD	0.00	42.43
A101	26174	09/29/14	1002 AFLAC	100	L472.125	DED:8108 AFLAC CNCR	0.00	93.91
A101	26174	09/29/14	1002 AFLAC	100	L472.125	DED:8017 AFLAC DSBL	0.00	23.40
TOTAL CHECK							0.00	370.11
A101	26175	09/29/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7301 A/F-CANCER	0.00	61.20
A101	26175	09/29/14	1701 AMERICAN FIDELITY A	100	L472.738	DED:7308 A.F. LIFE	0.00	73.00
A101	26175	09/29/14	1701 AMERICAN FIDELITY A	100	L472.734	DED:7304 125 ACIDNT	0.00	41.90

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A101	26175	09/29/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7309 A/F CANCER	0.00	53.90
A101	26175	09/29/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7299 CANCER A/T	0.00	6.00
A101	26175	09/29/14	1701 AMERICAN FIDELITY A	100	L472.734	DED:7310 A/F ACCIDE	0.00	33.40
A101	26175	09/29/14	1701 AMERICAN FIDELITY A	100	L472.730	DED:7300 A/F-DSBLTY	0.00	114.90
TOTAL CHECK							0.00	490.30
A101	26176	09/29/14	1795 AMERICAN FIDELITY A	100	L472.076	DED:7111 TSA AM/FID	0.00	580.69
A101	26176	09/29/14	1795 AMERICAN FIDELITY A	100	L472.076	DED:7110 TSA-AM.FID	0.00	1,250.00
TOTAL CHECK							0.00	1,830.69
A101	26177	09/29/14	1710 AMERICAN FIDELITY A	100	L472.732	DED:7302 UNREMB MED	0.00	282.00
A101	26178	09/29/14	2321 AMERICAN FIDELITY H	100	L472.735	DED:7298 AM/FID HSA	0.00	1,619.59
A101	26179	09/29/14	1206 OREGON DEPARTMENT O	100	L472.099	DED:0099 OR.DEPT.RV	0.00	274.21
A101	26180	09/29/14	1051 OREGON EDUCATION AS	100	L472.012	DED:8200 OEA	0.00	1,233.20
A101	26181	09/29/14	1052 OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	511.83
A101	26182	09/29/14	1939 OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	9.00
A101	26183	09/29/14	2183 LEGAL SHIELD	100	L472.740	DED:7350 PP LEGAL	0.00	93.65
A101	26184	09/29/14	2342 TEXAS LIFE	100	L472.736	DED:7606 TEXAS LIFE	0.00	48.00
A101	26184	09/29/14	2342 TEXAS LIFE	100	L472.736	DED:7607 TEXAS LIFE	0.00	56.50
TOTAL CHECK							0.00	104.50
A101	26185	09/29/14	2398 MOUNTAIN VIEW ACADE	100	R1910	RENT REFUND	0.00	3,450.00
TOTAL CASH ACCOUNT							0.00	142,721.12
TOTAL FUND							0.00	142,721.12

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FUND - 202 - AFTER SCHOOL PROGRAM

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26155	09/24/14	2405 KATHRYN ALBERT	2021111000000000	410	FINGERPRINTING	0.00	15.00
TOTAL CASH ACCOUNT							0.00	15.00
TOTAL FUND							0.00	15.00

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FUND - 228 - TITLE I 13-14

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26107	09/10/14	1792 MAUREEN WEATHERS	2281272000000000	410	PARENT OUTREACH EVE	0.00	61.42
TOTAL CASH ACCOUNT							0.00	61.42
TOTAL FUND							0.00	61.42

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FUND - 250 - REAP 13-14

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26113	09/10/14	1867 OSAC-ASPIRE	2501111000000000	340	LCC-ASPIRE CONFEREN	0.00	40.00
A101	26162	09/24/14	2407 OREGON TECH	2501111000000000	340	CONFERENCE FEE RIUS	0.00	25.00
TOTAL CASH ACCOUNT							0.00	65.00
TOTAL FUND							0.00	65.00

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FUND - 257 - TITLE IIA 13-14

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26133	09/17/14	1138 COSA	2572240000000000	340	FALL SPED CONFERENC	0.00	179.00
TOTAL CASH ACCOUNT							0.00	179.00
TOTAL FUND							0.00	179.00

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FUND - 275 - EBISS DEPTH 14-15

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26099	09/10/14	2310 KAY GRAHAM	2752240000000000	410	INCENTIVE PRIZES	0.00	112.14
TOTAL CASH ACCOUNT							0.00	112.14
TOTAL FUND							0.00	112.14

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FUND - 277 - EBISS DEPTH 13-14

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26055	09/03/14 2310	KAY GRAHAM	2772120000000000	410	EBISS COMPBOOKS	0.00	90.00
TOTAL CASH ACCOUNT							0.00	90.00
TOTAL FUND							0.00	90.00

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FUND - 292 - BUS REPLACEMENT

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	-----DESCRIPTION-----	SALES TAX	AMOUNT
A101	26047	09/03/14	2393 CAPITAL ONE PUBLIC	2925100000000000	610	ANNUAL BUS LOAN PMT	0.00	38,246.94
A101	26047	09/03/14	2393 CAPITAL ONE PUBLIC	2925100000000000	621	BUS LOAN INTEREST	0.00	6,492.44
TOTAL CHECK							0.00	44,739.38
TOTAL CASH ACCOUNT							0.00	44,739.38
TOTAL FUND							0.00	44,739.38

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ACCOUNTING PERIOD: 4/15

FUND - 295 - ATHLETICS & ACTIVITIES

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCT	-----DESCRIPTION----	SALES TAX	AMOUNT
A101	26087	09/10/14	1124 EMERALD EMPIRE VB O	2951132000000720	380	VOLLEYBALL OFFICIAL	0.00	1,240.50
A101	26103	09/10/14	1084 LANE COUNTY FOOTBAL	2951132000000710	380	FOOTBALL OFFICIALS	0.00	1,602.14
A101	26111	09/10/14	1197 O S A A	2951132000000700	640	14-15 ANNUAL DUES	0.00	1,605.00
TOTAL CASH ACCOUNT							0.00	4,447.64
TOTAL FUND							0.00	4,447.64

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ACCOUNTING PERIOD: 4/15

FUND - 297 - FOOD SERVICE FUND

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT
A101	26049	09/03/14	2274 CENTRAL RESTAURANT	2973100000000000	460	HOLDING CABINET	0.00	1,848.00
A101	26069	09/04/14	1022 U S BANK	2973100000000000	450	FOOD SUPPLIES	0.00	605.67
A101	26075	09/10/14	2377 BILLY REID	2973100000000000	340	FOOD SVC TRAVEL REI	0.00	795.62
A101	26079	09/10/14	2274 CENTRAL RESTAURANT	2973100000000000	460	FOOD BAR	0.00	2,395.00
A101	26086	09/10/14	2291 EARTH20	2973100000000000	450	WATER FOR STUDENTS	0.00	5.00
A101	26086	09/10/14	2291 EARTH20	2973100000000000	450	WATER FOR STUDENTS	0.00	1.00
TOTAL CHECK							0.00	6.00
A101	26089	09/10/14	2120 FOOD SERVICES OF AM	2973100000000000	450	FOOD SUPPLIES	0.00	1,781.23
A101	26089	09/10/14	2120 FOOD SERVICES OF AM	2973100000000000	450	FOOD SUPPLIES	0.00	788.77
A101	26089	09/10/14	2120 FOOD SERVICES OF AM	2973100000000000	450	FOOD SUPPLIES	0.00	713.87
TOTAL CHECK							0.00	3,283.87
A101	26096	09/10/14	1071 JERRY'S BUILDING MA	2973100000000000	410	TWO CLOCKS	0.00	59.98
A101	26101	09/10/14	1928 KLEEN SOLUTIONS, IN	2973100000000000	410	SANITIZING SUPPLIES	0.00	63.40
A101	26107	09/10/14	1792 MAUREEN WEATHERS	2973100000000000	410	TABLECLOTHS	0.00	89.88
A101	26118	09/10/14	1949 SCHOOL OUTFITTERS	2973100000000000	460	CAFETERIA CHAIRS	0.00	3,073.54
A101	26118	09/10/14	1949 SCHOOL OUTFITTERS	2973100000000000	460	CAFETERIA TABLE DOL	0.00	288.80
A101	26118	09/10/14	1949 SCHOOL OUTFITTERS	2973100000000000	460	CAFETERIA CHAIRS	0.00	4,667.65
TOTAL CHECK							0.00	8,029.99
A101	26121	09/10/14	1776 SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	1,111.75
A101	26121	09/10/14	1776 SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	2,449.53
TOTAL CHECK							0.00	3,561.28
A101	26122	09/10/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	108.10
A101	26122	09/10/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	237.85
A101	26122	09/10/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	395.65
TOTAL CHECK							0.00	741.60
A101	26142	09/17/14	1776 SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	448.04
A101	26142	09/17/14	1776 SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	805.89
TOTAL CHECK							0.00	1,253.93
A101	26143	09/17/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	250.50
A101	26143	09/17/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	75.00
TOTAL CHECK							0.00	325.50
A101	26168	09/24/14	1776 SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	1,096.53
A101	26168	09/24/14	1776 SYSCO FOOD SERVICES	2973100000000000	450	FOOD SUPPLIES	0.00	1,083.88
TOTAL CHECK							0.00	2,180.41
A101	26169	09/24/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	237.55
A101	26169	09/24/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	13.55
A101	26169	09/24/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	60.56

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FUND - 297 - FOOD SERVICE FUND

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	-----DESCRIPTION----	SALES TAX	AMOUNT
A101	26169	09/24/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	137.95
A101	26169	09/24/14	2193 UMPQUA DAIRY	2973100000000000	450	FOOD SUPPLIES	0.00	62.55
TOTAL CHECK							0.00	611.16
TOTAL CASH ACCOUNT							0.00	25,851.29
TOTAL FUND							0.00	25,851.29

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FUND - 300 - DEBT SERVICE FUNDS

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	-----DESCRIPTION----	SALES TAX	AMOUNT
A101	26047	09/03/14	2393	CAPITAL ONE PUBLIC	3005100000000610 621	LOAN #1 INTEREST	0.00	2,375.37
A101	26047	09/03/14	2393	CAPITAL ONE PUBLIC	3005100000000610 610	ANNUAL LOAN #1 PMT	0.00	17,787.15
TOTAL CHECK							0.00	20,162.52
A101	26173	09/29/14	2384	ENERGY LOAN PROGRAM	3005100000000620 610	LOAN II PRINCIPAL	0.00	5,199.03
A101	26173	09/29/14	2384	ENERGY LOAN PROGRAM	3005100000000620 621	LOAN II INTEREST	0.00	5,266.97
TOTAL CHECK							0.00	10,466.00
TOTAL CASH ACCOUNT							0.00	30,628.52
TOTAL FUND							0.00	30,628.52

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ACCOUNTING PERIOD: 4/15

FUND - 400 - CAPITAL PROJECTS

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26043	09/03/14	2376 2G CONSTRUCTION	4002540001000602	590	JULY PROGRESS PMT	0.00	375,063.22
A101	26045	09/03/14	1973 BRIDGEWAY CONTRACTI	4002540002000611	590	WEST WING GRID SYST	0.00	5,380.00
A101	26046	09/03/14	2392 BRYAN MATTHEWS PAIN	4002540002000608	590	RESTROOM FLOORS	0.00	8,900.00
A101	26057	09/03/14	2048 LYNN'S ELECTRIC CO.	4002540002000611	590	WEST WING LIGHTING	0.00	822.00
TOTAL CASH ACCOUNT							0.00	390,165.22
TOTAL FUND							0.00	390,165.22
TOTAL REPORT							0.00	639,075.73

**Recommendation Rationale
For
1.5% Salary Increase for All Staff**

Board Members,

As you know, the Board has directed me to keep focused on three high priority objectives, consistent with your strategic plan. The first is Objective 1, to ensure the fiscal integrity of our District. As you have seen, last year, we made the necessary changes to our budget to reverse a \$175,000 deficit and increased our ending balance by approximately \$30,000. This is a great beginning, yet, I do want to note that we need to continue to build reserves and increase class sizes, which are referenced as evaluation criteria within Objective 1. Overall, I believe that we are fiscally sound but we still have room to improve in addressing the needed reserves in the years ahead.

The second priority, Objective 2, within your strategic plan is creating safe and attractive classrooms and facilities. Like Objective 1, we have made significant improvements, with more to address in the future. Yet, today, I strongly believe that we have sound, safe and attractive facilities.

I believe that we have sufficient financial and human resources to address the Objectives 3 – 12. Our staff is committed to making great things happen in each of the objectives.

Objective 13, Competitive Salaries, was a major focus in last year's negotiations. The foundation to our negotiation philosophy was to have the parties agree to what was a competitive salary and then to move forward accordingly. OSEA and LEA negotiations ended with agreement to the salary increase that either maintained competitiveness (LEA) or created competitiveness (OSEA, Management and Confidential).

As we entered this year, we all realized that there were many unknown fiscal challenges, some of which are still working themselves out. The most significant is the fiscal impact of the Charter School on the District and the fiscal impact of the building renovation program. In both cases, the status seems positive. Yet, next year will likely tell the whole story.

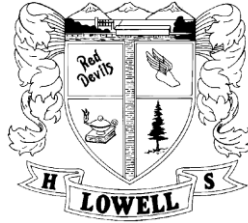
With the District in sound fiscal condition this year, consistent with the direction you have provided to me in your strategic plan, I will be recommending to you at the October 27th Board Meeting for you to approve a 1.5% salary proposal from OSEA. In my discussions with Mary Kay Brandt (OSEA Field Rep), we agreed that 1.5% is what would keep us competitive with other districts. She related that districts, in general, are agreeing on between 1 – 2% increases to the salary schedule. Again, recognizing your philosophical belief that each unit should be paid competitively, I will be recommending that you provide each unit (OSEA, LEA, and Management/Confidential) a 1.5% increase (full disclosure....even Kay and me). To do so will mandate an increase in salaries and benefits, overall, of approximately \$29,923, as is reflected in the attached.

As way of summary, attached is an analysis of the salaries reflected within the budget that Debi has prepared for us. As you can see, in the General Fund (100), we are \$65,000 under budget in salaries. This is due to staff changes and that we have created efficient staff schedules that reflect the correct funding source, particularly in Food Services. Please note in food services, we are \$26,000 over the approved budget in salaries. Yet, as you know, our participation and income has grown radically in Food Services, which is one of the reasons that salaries went up. This new income is not being reflected in this analysis. The bottom line, Food Services will be able to handle the salary increase without impacting the General Fund. Our Activities budget is over budget by \$7,800 due to the increase in the stipends provided. Again, this can be handled within the General Fund Budget due to the slight increase in enrollment. Other than that, the numbers speak for themselves.

2014-15 Projected Payroll as of 10/9/2014

		Counselor	Gear-up	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15	2014-15	Rentals	Activities			
		Grant	Grant	Title 1A	Title IA	Title IIA	Title IIA	REAP	REAP	YTP	Fund	Fund	Cafeteria		
FUND:	<u>100</u>	<u>204</u>	<u>208</u>	<u>228</u>	<u>226</u>	<u>257</u>	<u>255</u>	<u>250</u>	<u>251</u>	<u>260</u>	<u>294</u>	<u>295</u>	<u>297</u>		
Salaries	1,296,477	29,071	8,374	5,086	73,894	1,861		3,645	20,156	11,199	8,711	49,000	72,144	1,579,618	X 1 .2629 (PERS) :
Benefits:	716,379	11,453	3,247	2,581	38,511	656		2,533	13,785	839	4,868	14,712	39,234		1,994,899 X 1.5% =
Travel/supplies				<u>81</u>	<u>15,000</u>	<u>1,494</u>			<u>893</u>						
TOTAL:	2,012,856	40,523	11,621	7,748	127,405	4,011		6,178	34,834	12,039	13,579	63,712	111,378		
Budgeted:	<u>2,078,328</u>	<u>40,523</u>	<u>15,000</u>	<u>11,050</u>	<u>129,490</u>	<u>11,793</u>	<u>13,440</u>	<u>6,178</u>	<u>18,000</u>	<u>12,039</u>	<u>13,746</u>	<u>55,872</u>	<u>84,539</u>		
Difference:	(65,472)	0	(3,379)	(3,302)	(2,085)	(7,782)		(0)	16,834	(0)	(167)	7,840	26,839	(30,675)	

Lowell School District #71



Strategic Plan

Board of Directors

Dennis McCallum, Chair
Suzanne Kintzley, Vice Chair
Leslie Brandt
Jim Chapman
Mike Galvin

Superintendent

Walt L. Hanline, Ed.D.

Principal

Kay Graham

STRATEGIC PLAN OVERVIEW

The **Lowell School District #71** Strategic Plan, adopted by the Board of Trustees, is the management plan for the District. The following is a description of the purpose, components, definitions, process, and timeline related to the plan.

The Strategic Plan has three main purposes. First, the plan defines the District's vision, mission, and strategic goals. Second, the plan details how the District will achieve those goals. Third, the plan serves as the common tool for managing changing priorities, as indicated by the ordering of the objectives. All District decisions should reflect the priorities of the Strategic Plan.

The components of the Strategic Plan are defined below:

- **VISION**
What the District is striving to do.
- **MISSION**
What the District will accomplish by the end of the five-year Strategic Plan.
- **STRATEGIC GOALS**
Actions to be completed by District and site staff.
- **OBJECTIVES**
Actions by District and site staff to achieve the strategic goals.
- **EVALUATION CRITERIA**
Measurement of how the school and district will assess their annual progress against the objectives.
- **ACTION PLANS and PROJECT ACTIVITIES**
Administered by the Superintendent, Action Plans are the specific plans, which must be completed by each school to achieve the specific objectives.

The implementation of the Strategic Plan follows a yearly update cycle to ensure that the plan reflects the priorities defined by the Board of Trustees. Implementation of the Strategic Plan continues throughout the year and is evaluated, analyzed, and revised annually.

Key Objectives:

Key objectives for the district will be measured against districts/schools with similar demographics.

Questions regarding the Strategic Plan should be directed to the Superintendent.

This Strategic Plan was developed with the assistance of the stakeholders on **January 17, 2014** and the Board of Trustees on **January 25, 2014**, and was facilitated by Walt L. Hanline, Ed.D., Executive Director of the National Center for Executive Leadership and School Board Development. It was approved on April 28, 2014.

Lowell School District #71

Strategic Plan

Vision Statement:

Dedicated to educational achievement and the success of every student.

Mission Statement:

Together with families and the community, we will provide each student a challenging, quality education, in a safe and supportive small school environment. We are committed to:

- Providing rigorous standards-based teaching and learning programs that are responsive to each student's needs
- Ensuring that each student makes measurable yearly academic progress
- Preparing all students for personal success by providing college and career opportunities and programs
- Promoting diverse opportunities, in and out of the classroom
- Maintaining our unique environment that assures participation in team sports, arts, clubs, or extra-curricular activities
- Inspiring creativity, critical thinking, leadership skills, and life-long learning
- Cultivating respectful students with a strong work ethic, grit and determination, who are self-directed, responsible community members

Strategic Goals:

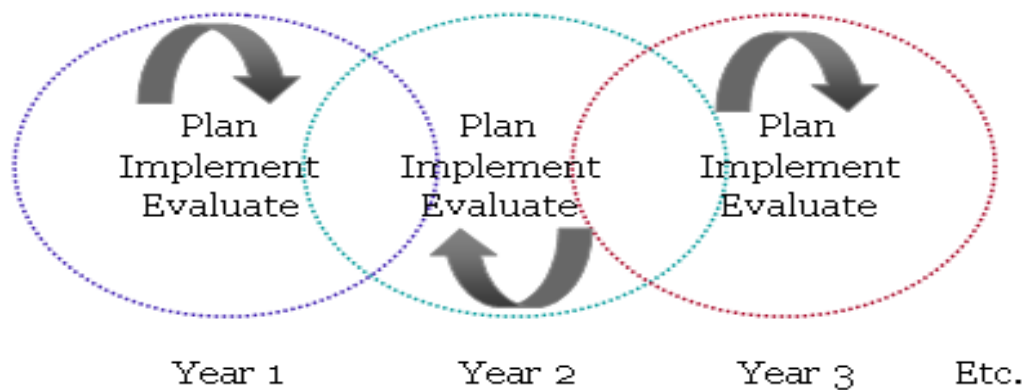
- **Curriculum and Instruction:** Continue to design, implement, evaluate, and improve instructional programs to ensure every student meets the district standards.
- **Human Resources:** Recruit, select, develop, evaluate and retain the highest quality staff.
- **Student Services:** Continue to design, implement, evaluate, and improve programs and services to support success for all students.
- **Family and Community Partnerships:** Design, implement, evaluate, and improve partnerships that support the goals and objectives of the District.
- **Facilities and Equipment:** Provide an environment that is safe, clean and attractive that promotes student learning and fosters student, staff, and community pride.
- **Alternative and Optional Educational Programs and Services:** Provide for alternative and optional educational programs and services for our students, families and communities.
- **Strategic and Financial Planning:** Continue to design, implement, evaluate, and improve the strategic planning process to ensure that the short-term and long-range human, financial and capital resources are efficiently and effectively allocated.

Lowell School District #71 Strategic Plan Timeline

		Strategic Plan Year 2013-2014	Strategic Plan Year 2014-2015	Strategic Plan Year 2015-2016
Planning	1. Approval by the Board of Trustees of Strategic Plan and Evaluation Criteria	Spring of 2014	Spring of 2015	Spring of 2016
	2. Initial Budget Study Session of the Board to Address Preliminary Budget Options	May	May	May
	3. Final Budget Study Session of the Board to Address Preliminary Budget Options	May	May	May
	4. District Budget Approved by Board of Trustees	June	June	June
	5.. Strategic Plan Implementation	July 2014- June, 2015	July 2015- June, 2016	July 2015- June, 20167
Evaluation	6. Quantitative Evaluation of Data - Collect and Organize Data	Implementation Year	Sept. - Oct.	Sept. - Oct.
	7. Annual Strategic Plan Report Submitted to the Board for Acceptance, Reflecting Qualitative and Quantitative Data	Implementation Year	February 2016	February 2017
	8. Superintendent and Principals' Evaluation Completed, Reflecting the Annual Strategic Plan Report Approved by the Board.	Implementation Year	Feb. - March 2016	Feb. - Mar. 2017

Timeline

Continuous process



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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Business Services**

Site: **District Office**

STRATEGIC GOAL: Financial Planning									
1.0 OBJECTIVE: FISCAL INTEGRITY AND ACCOUNTABILITY Continue to design, develop, implement, and evaluate the short-term and long-range financial and human resource allocation system to ensure fiscal accountability and for the implementation of the goals and prioritized objectives of the District's strategic plan.									
EVALUATION CRITERIA FOR 2014-2015:			X = MET						
1.1	Create and maintain a reserve for economic uncertainties of 8% within the General Fund balance.(\$240,000)								
1.2	Create and maintain an ongoing equipment replacement fund/reserve of 3%. (\$90,000)								
1.3	Create and maintain an ongoing Special Education uncertainty reserve of \$75,000.								
1.4	Create and maintain a 3% Unrestricted General Fund contribution to routine Maintenance and Repair.								
1.5	Provide funding for the implementation of the Strategic Plan priorities, as evidenced by a balanced budget approved by the Board that is not in deficit spending, not later than July 1, 2015.								
1.6	Contribute 1% of the annual budget to the Post Retirement Benefit Reserve.								
1.7	The Superintendent shall ensure that Mountain View Charter School provides a monthly fiscal report to the Board, which will ensure that the Charter School is in a sound financial condition.								
1.8	Recognizing the need to be competitive and the requirements associated with the implementation of Oregon Core Standards, all classrooms at the K-6 level shall be grade specific classrooms (combination classrooms will not exist)								
1.9	Recognizing that the District is funded based upon average ADM, maintain the level of class size in each grade level as reflected below: <table><tr><td>Kindergarten – Third Grade</td><td>22 to 1</td></tr><tr><td>Fourth – Sixth Grade</td><td>26 to 1</td></tr><tr><td>Seventh – Twelfth Grade</td><td>28 to 1</td></tr></table>	Kindergarten – Third Grade	22 to 1	Fourth – Sixth Grade	26 to 1	Seventh – Twelfth Grade	28 to 1		
Kindergarten – Third Grade	22 to 1								
Fourth – Sixth Grade	26 to 1								
Seventh – Twelfth Grade	28 to 1								
1.10	To ensure the continued existence and financial integrity of Lowell School District #71, investigate the opportunity of placing a tax initiative before the voters.								

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Business Services**

Site: **District Office**

STRATEGIC GOAL: FACILITIES AND EQUIPMENT			
2.0 OBJECTIVE: SAFE, FUNCTIONAL, ACCESSIBLE, CLEAN, AND ATTRACTIVE CLASSROOMS, FACILITIES AND GROUNDS Continually improve staff and student performance and to foster community pride by providing for safe, functional, accessible, clean, and attractive classrooms, facilities and grounds.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	2.1	On a Likert Scale survey, with a minimum of 100% return, staff will rate safe, clean, sustainable and attractive classrooms, facilities and grounds to establish baseline.	
	2.2	Report on the updated and completed projects of the Master Facility Plan will be provided to the Board on an annual basis, not later than March of each year.	
	2.3	On a Quarterly Basis, the District Site Facility Team (Composed of two Board members, Superintendent, and Principal) will be established to review and assess the status of District facilities and school sites. A rating scale will be used to establish District benchmarks.	
	2.3	Monthly Site Facility Inspection Reports of each school site to be communicated to the Board.	
	2.4	District administration will be trained in fall 2015 in Crisis Response (CR) Implementation. School sites will develop and implement CR plans by February, 2015; Board Report in April 2015.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: TBD

Site/Division: Human Resources

Site: District Office

STRATEGIC GOAL: Human Resources			
3.0 OBJECTIVE: RECRUITMENT, SELECTION, PROFESSIONAL DEVELOPMENT, EVALUATION AND RETENTION OF STAFF			
Continue to improve the processes of recruitment, selection, professional development, evaluation and retention to provide high quality staff.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	3.1	Evaluation of classified and certificated staff will be completed within required timelines, with appropriate recommendations and commendations.	
	3.2	Provide an annual assessment of each staff member, to the Board, in February of each school year.	
	3.3	Provide a report to the Board, not later than March of 2015, on the professional development needs for certificated, classified, administrative staff and the Board..	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Family and Community Partnerships			
4.0 OBJECTIVE: OUTREACH AND PARTNERSHIPS			
Continue to design, develop, implement, improve, and evaluate student, family, staff and community outreach and partnerships that provide direct and indirect support to the schools and the District.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	4.1	Review each office area in each school site and make structural changes that would provide a welcoming reception area for students and parents.	
	4.2	Review and revise the Visitor policy and procedures to ensure that parents feel welcomed to the school and classrooms.	
	4.3	Develop and Implement a marketing program that will result in the increase of students attending Lowell School District.	
	4.4	Increase student enrollment in Lowell School District to 260 students by September of 2015.	
	4.5	Increase by 3% the overall government grants received by the Lowell School District #71.	
	4.6	Increase by 3% the overall private grants/donations received by the Lowell School District #71.	
	4.7	Increase by 3% the overall community and booster funding received by the Lowell School District #71.	
	4.8	Establish a program whereby each school site has an active community business partnership	
	4.10	Report to the Board on the degree to which families are being engaged in the academic lives of their children by qualitative and quantitative data, as well as other data points specific to the school.	
	4.10.1	Engage families in understanding and supporting District curriculum; provide a list of specific strategies to the Board.	
	4.10.2	Increase, for all families, access to specific information regarding their children's education and educational programs; provide a list of specific strategies to the Board.	
	4.10.3	Increase by 5% the number of parents and family members who volunteer at their children's schools based on 2013-2014 numbers.	
	4.10.4	Increase, by 5% over 2013-2014 parent and family attendance at parent conferences, Back to School Nights, PTA and PTSC meetings.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: TBD

Site/Division: Business Services

Site: District Office

STRATEGIC GOAL: Facilities and Equipment

5.0 OBJECTIVE: IMPROVE TECHNOLOGY

Continue to design, develop, implement, evaluate, and improve technology hardware, software, and infrastructure to meet administrative and instructional requirements.

EVALUATION CRITERIA FOR 2014-2015:

X = MET

	5.1	By March 15, 2015 establish district technology standards that identify grade-level technological skills and appropriately rigorous expectations for student production in using technology to demonstrate critical thinking, problem-solving and creativity.	
	5.2	Develop a funding and purchasing plan that will ensure that each student has a personal electronic notebook in their possession by September of 2016.	
	5.3	On a 5-point Likert Scale Survey, with a minimum of 100% return, staff will rate satisfaction with information technology services to establish baseline.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction			
6.0 OBJECTIVE: READING/LANGUAGEARTS PROGRAM			
Continue to design, develop, implement, evaluate, and improve the standards-based Reading/Language Arts Program			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
6.1	Fully implement the common core state standards and instructional practices associated with K-12 Literacy: Reading/Writing/Language Development/Language Arts in every classroom in the District, as demonstrated by observations from Professional Peers, Principals, Vice Principals, and Educational Services Staff. Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.		
6.2	Provide a report to the Board, on or before January 31, 2015, on the opportunities and programs provided to students to improve their public speaking skills.		
	<u>District wide Assessment Example:</u>		
6.3.1	Once the Oregon Core Standards assessment system is implemented the assessment criteria will be applied to Lowell School District.		

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction			
7.0 OBJECTIVE: MATH PROGRAM Continue to design, develop, implement, evaluate, and improve the standards-based Math Program.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	7.1	Fully implement the common core state standards and instructional practices associated with K-12 Math Program in every classroom in the District, as demonstrated by observations from Professional Peers, Principals, Vice Principals, and Educational Services Staff. Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.	
	7.2	Board Report on K-12 Math Program implementation, including assessment outcomes, as follows:	
		<u>District-wide Assessment</u>	
	7.2.1	Once the Oregon Core Standards assessment system is implemented the assessment criteria will be applied to Lowell School District.	

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Lowell School District #71

STRATEGIC PLAN

2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction			
8.0 OBJECTIVE: SCIENCE PROGRAM			
Continue to design, develop, implement, evaluate, and improve standards-based Science Program.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	8.1	Fully implement the common core state standards and instructional practices associated with K-12 Science Program in every classroom in the District, as demonstrated by observations from Professional Peers, Principals, Vice Principals, and Educational Services Staff. Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.	
	8.2	Board Report on K-12 Science Program implementation, including assessment outcomes as follows:	
		<u>District-wide Assessment</u>	
	8.2.1	Once the Oregon Core Standards assessment system is implemented the assessment criteria will be applied to Lowell School District.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction			
9.0 OBJECTIVE: HISTORY/SOCIAL SCIENCE PROGRAM Continue to design, develop, implement, evaluate, and improve the standards-based History/Social Science Program..			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
Grades K-12:			
	9.1	Fully implement the common core state standards and instructional practices associated with K-12 History/Social Science Program in every classroom in the District, as demonstrated by observations from Professional Peers, Principals, Vice Principals, and Educational Services Staff. Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.	
	9.2	Board Report on K-12 History/Social Science Program implementation, including assessment outcomes as follows:	
	9.2.1	Once the Oregon Core Standards assessment system is implemented the assessment criteria will be applied to Lowell School District.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction			
10.0 OBJECTIVE: CAREER AND TECHNICAL EDUCATION Continue to design, develop, evaluate implement, and improve the Career and Technical Education Program.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	10.1	Develop/Update the Career Technical Educational Plan by May 2015.	
	10.2	Increase by 5% over 2013-2014, the number of students earning a certification.	
	10.3	Increase by 5% over 2013-2014, the number of 2+2 course offerings that are articulated through Community College, inclusive of all high school students.	
	10.4	Establish a CTE Advisory Committee with representation from each industry pathway offered by January 2015.	
	10.5	The high school will expand the opportunities for students to participate in "post-secondary" informational events, including on and off site College and Career Fairs.	
	10.6	Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction			
11.0 OBJECTIVE: MODERN/WORLD LANGUAGE Continue to design, develop, implement, evaluate, improve, and expand the standards-based Modern/World Language opportunities for all K - 12th grade students.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	11.1	Expand Modern Language opportunities for 7th and 8th grade students and ensure that at least <u>25</u> % of the students enrolled receive at least one quarter of Modern Language instruction.	
	11.2	9-12 Modern Language curriculum and instruction will be 100% aligned with standards in grades K-8.	
	11.4	Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Student Services			
12.0 OBJECTIVE: EXTRA CURRICULAR ACTIVITIES			
Continue to design, develop, implement, evaluate and improve extra-curricular activities.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	12.1	During the 2014-2015 school year, establish the baseline for the number of students participating in clubs at the 7-12 level will increase by 3% in the 2015-2016 school year.	
	12.2	The high school student leadership will develop and implement an annual student council training workshop for grades 4-8 and grades 9-12.	
	12.3	A Board Report will be presented by the high school leadership on the Annual Student Council Leadership Conference.	
	12.4	Develop and Implement a Coach/Parent/Student Athletic Handbook, which will include the evaluation process for coaches and eligibility criteria and process for students.	
	12.5	The number of students participating in athletic programs at the 7-12 level will increase by 2% over 2013-2014	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Human Resources**

Site: **District Office**

STRATEGIC GOAL: Human Resources			
13.0 OBJECTIVE: COMPETITIVE SALARIES AND BENEFITS			
Provide competitive salaries and benefits for all employees as compared with districts with similar demographics.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	13.1	Gather salary and benefit data for each group from comparable Lowell School District #71s within and outside the recruiting area and provide a recommendation to the Board and Associations for districts to be used in comparison data collection. Provide a report to the Board, not later than April of 2015	

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Lowell School District #71

STRATEGIC PLAN

2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction		
14.0 OBJECTIVE: PHYSICAL EDUCATION PROGRAM Continue to design, develop, implement, evaluate, and improve the standards-based Physical Education Program.		
EVALUATION CRITERIA FOR 2014-2015:		
		X = MET
14.1	K-12 Physical Education Program curriculum will be 100% aligned with state frameworks, as evidenced by District audit.	
14.2	Increase by 5% over 2013, the percent of students in grades 5, 7, & 9 passing the five Fitness Gram components as established by district and state requirements.	
14.3	Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Curriculum and Instruction			
15.0 OBJECTIVE: VISUAL AND PERFORMING ARTS Continue to design, develop, implement, evaluate, and improve the standards-based Visual and Performing Arts Program.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	15.1	Board Report on a plan of action to increase opportunities and participation in Visual and Performing Arts.	
	15.1.1	100% of 4th grade elementary students will participate in choral and instrumental instruction.	
	15.1.2	Establish a baseline in 2014-2015; then in 2015-2016 increase the number of students participating in band instruction by 5%.	
	15.1.3	District will assess the performing arts current offerings within the K-12 program.	
	15.2	Provide a report to the Board, on or before January 31, 2015, on the progress made in fully implementing the Oregon Common Core State Standards.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

Alternative and Optional Educational Programs and Services:			
16.0 OBJECTIVE: ALTERNATIVE AND EDUCATIONAL OPTIONS Continue to design, develop, implement, evaluate, and improve alternative and optional educational services and programs for students, parents, and the community.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	16.1	On or before April of 2015, review each of the educational options presently provided by the District and present a report to the Board reflecting areas for improvement and/or expansion.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Business Services**

Site: **District Office**

STRATEGIC GOAL: Facilities and Equipment			
17.0 OBJECTIVE: NEW AND MODERNIZED EQUIPMENT Continue to design, develop, and implement a plan to maximize resources to provide new and modernized equipment that improve services to students and staff efficiency.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	17.1	Develop and maintain a list of equipment replacement needs, as reflected within the Master Equipment Plan approved by the Board, on or before December of 2014.	

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Lowell School District #71
STRATEGIC PLAN
2013-2014

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Student Services

18.0 OBJECTIVE: DECISION-MAKING AND BEHAVIOR

Continue to design, develop, implement, evaluate, and improve services that promote self-confidence, positive decision making, community pride, and the skills necessary to be a respectful, self-directed, productive citizen.

EVALUATION CRITERIA FOR 2014-2015:

X = MET

18.1	Present a report to the Board, by June of 2015, of the services, activities, projects, and programs that promote positive student decision-making.	
18.2	Revise District, school-wide, and classroom management and discipline plans and present said plans to the Superintendent for approval, on or before September 1, 2014.	
18.3	Develop graduation ceremony participation criteria that reflect that a student is a balanced and well prepared to be a positive contributing member of our community and society. (The criteria shall address academic performance, leadership demonstration, community involvement and school involvement)	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: TBD

Site/Division: Educational Services

Site: District Office

STRATEGIC GOAL: Student Services			
19.0 OBJECTIVE: PHYSICAL, MENTAL SOCIAL/EMOTIONAL HEALTH Continue to design, develop, implement, evaluate, and improve services that promote physical, mental and social/emotional health.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	19.1	Increase by 5% over 2013-2014, the number of students participating in the Child Nutrition program.	
	19.2	100% of the students targeted as having health problems through mandatory screenings and assessments (i.e. vision, hearing, and scoliosis, nutritional or other medical conditions) will receive the necessary follow up regarding medical or health services.	
	19.3	In partnership with Lane ESD, implement an "Intern" program with local universities in the areas of mental, physical and emotional health. The program will focus on providing support services to students and families.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: TBD

Site/Division: Human Resources

Site: District Office

STRATEGIC GOAL: Human Resources

20.0 OBJECTIVE: STANDARDS AND REVIEW PROCEDURES

To ensure that each employee is paid in an equitable and fair manner, consistent with their job description.

EVALUATION CRITERIA FOR 2014-2015:

X = MET

	20.1	Review and/or update all job descriptions of the district, ensuring that each job description is up to date on the legal issues related to the position and that each individual is paid consistent with the expectations reflected in each job description.	
	20.2	On a Likert scale of 1-5, staff will rate training effectiveness as a tool to improve their job performance with an average score of 3 or higher.	
	20.3	Ensure a 100% completion rate for all personnel that are scheduled for evaluations each year.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Educational Services**

Site: **District Office**

STRATEGIC GOAL: Student Services			
21.0 OBJECTIVE: STUDENT TRANSITIONS			
Continue to design, develop, implement, evaluate, and improve services that ensure smooth transitions within the district.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	21.1	Board Report on the evaluation results of the transition activities provided for each grade level, including the following:	
	21.1.1	70% of incoming kindergarten students and their parents will have successfully participated in Kindergarten "Round Up" activities.	
	21.1.2	By the end of grade 8, 100% of students and their parents will have met with guidance counselors to develop their four-year and postgraduate plans.	
	2.1.3	95% of students enrolled in grade 6 will participate in elementary to junior high school transition activities.	
	21.1.5	95% of parents of enrolled 6 th and 7 th grade students will participate in transition activities for families.	
	21.1.6	Develop and provide to the Board a specific list of activities to facilitate successful transitions from 6 th to 7 th and from 8 th to 9 th grades.	
	21.1.7	Increase by 5% the percent of parents and senior students participating in post-secondary education planning activities.	
	21.3	Increase by 5% over 2013-2014, the number of students going to four year universities directly from high school.	
	21.4	Establish a Four-Year Educational Plan that is an integral part of the Ninth Grade Counseling program offered at the high school.	
	21.5	Increase by 5% over 2013-2014, the number of students going to community college and career trade school directly from high school.	

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Lowell School District #71
STRATEGIC PLAN
2014-2015

Name: **TBD**

Site/Division: **Business Services**

Site: **District Office**

STRATEGIC GOAL: Facilities and Equipment			
22.0 OBJECTIVE: NEW AND MODERNIZED FACILITIES Continue to design, develop, and implement a plan to maximize resources to provide new and modernized facilities to improve the functionality, appearance, and conditions of present facilities.			
EVALUATION CRITERIA FOR 2014-2015:			X = MET
	22.1	Ensure that all timelines for the completion of new construction and modernization projects are met.	

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Lowell School District #71
2014-15 General Fund Financial Summary
September 30, 2014

	Budget	Actual: Jul-Sep		Projected: Oct-Jun		Projected for Year	Over/(Under) Budget	
Resources								
State School Fund	2,855,000	864,645	30.4%	1,981,020	69.6%	2,845,665	(9,335)	-0.3%
Property Tax	871,400	3,355	0.4%	867,950	99.6%	871,305	(95)	0.0%
Miscellaneous/Local Revenues	40,000	12,225	29.7%	29,000	70.3%	41,225	1,225	3.1%
Common School Funds	28,000	-	0.0%	29,786	100.0%	29,786	1,786	6.4%
Rent	27,000	3,450	14.3%	20,700	85.7%	24,150	(2,850)	-10.6%
Small High School Grant	14,000	-	0.0%	14,000	100.0%	14,000	-	0.0%
Indirect Fees on Grants	5,000	3	0.1%	4,997	99.9%	5,000	-	0.0%
County School Funds	4,000	-	0.0%	4,000	100.0%	4,000	-	0.0%
Business Services to Charter	-	4,000	20.0%	16,000	80.0%	20,000	20,000	-
Interest	3,400	1,003	27.0%	2,718	73.0%	3,721	321	9.4%
Total Revenues	3,847,800	888,681	23.0%	2,970,171	77.0%	3,858,852	11,052	0.3%
Beginning Fund Balance	245,000	385,000	100.0%	-	0.0%	385,000	140,000	57.1%
Total Resources	4,092,800	1,273,681	30.0%	2,970,171	70.0%	4,243,852	151,052	3.7%
Requirements								
Salaries	1,407,399	205,481	15.0%	1,160,505	85.0%	1,365,986	(41,413)	-2.9%
Benefits	980,030	130,555	14.7%	758,229	85.3%	888,784	(91,246)	-9.3%
Purchased Services	417,010	41,464	10.0%	374,125	90.0%	415,589	(1,421)	-0.3%
Supplies and Materials	275,325	99,386	35.6%	180,164	64.4%	279,550	4,225	1.5%
Capital Outlay	10,000	-	-	10,000	100.0%	10,000	-	-
Other	70,560	71,258	89.6%	8,280	10.4%	79,538	8,978	12.7%
Charter School Payments	538,000	69,072	13.6%	440,654	86.4%	509,726	(28,274)	-5.3%
Transfers	228,539	-	0.0%	228,539	100.0%	228,539	-	0.0%
Total Expenditures	3,926,863	617,216	16.3%	3,160,496	83.7%	3,777,712	(149,151)	-3.8%
Contingency/Carryover	165,937	-	0.0%	-	0.0%	466,141	300,204	180.9%
Total Requirements	4,092,800	617,216	14.5%	3,160,496	74.5%	4,243,852	151,052	3.7%

(1) Revenue that was received after the budget was prepared exceeded expectations. The May SSF estimate/reconciliation was \$79,000 more than anticipated. The year end payments from districts for the Lowell students in their charter schools were also more than anticipated.

(2) Significant health care savings due to employees' personal health insurance decisions and staff FTE being charged to funds outside of the general fund.

(3) Based on current ADMr figure of 84 and 19 students from other districts without open enrollment agreements.

Oregon School Boards Association Selected Sample Policy

Code: **BBFA**
Adopted:

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 spouse¹, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law; 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.

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

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.

¹The term spouse includes domestic partner.

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, ~~and~~ 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 ~~their~~ 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 spouse¹, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law; 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.
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/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:

4. 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.

5. 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.
6. Upon request by the Board member, the source will give notice of the value of the merchandise, goods, or services received.
7. 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” 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/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

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 199-005-0003](#) to -199-020-0020

38 OR. ATTY. GEN. OP. 1995 (1978)

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

Oregon School Boards Association Selected Sample Policy

Code: **BBFB**
Adopted:

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);
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 spouse¹, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law;
2. The spouse of the Board member's parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law.

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

¹The term spouse includes domestic partner.

END OF POLICY

Legal Reference(s):

[ORS 244](#).010 to -244.400
[ORS 659A](#).309

[OAR 199-005](#)-0003 to -199-020-0020

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

Oregon School Boards Association Selected Sample Policy

Code: **EEACA**
Adopted:

School Bus Driver Examination and Training (Version 1)

School bus drivers must pass physical examinations administered by a medical examiner listed in the Federal Motor Carrier Safety Administration's National Registry of Certified Medical Examiners and meet other criteria as established by state and federal law and by Oregon Department of Education regulations including the requirements for a commercial driver's license (CDL).

A school bus manufacturer, school bus dealer or school bus mechanic is not required to have a school bus endorsement while operating a school bus that is not transporting students.

END OF POLICY

Legal Reference(s):

ORS 659.840	ORS 807.038	OAR 581-053-0004
ORS 659A.300	ORS 820.110	OAR 581-053-0031
ORS 659A.306		OAR 581-053-0040
ORS Chapters 801, 802, 807, 809, 811, 813	OAR 581-053-0002	OAR 581-053-0053
	OAR 581-053-0003	OAR 581-053-0060

Omnibus Transportation Employee Testing Act of 1991, 49 U.S.C. §§ 31301-31317; 49 C.F.R. Parts 40, 382, 391-395 (2006).
Federal Motor Carrier Safety Administration Regulations, 49 C.F.R. Part 391, §§ 391.42, 391.43 (2014).

Oregon School Boards Association Selected Sample Policy

Code: **GBC**
Adopted:

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.
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 spouse¹, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law;
2. The spouse of the employee's parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law.

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, ~~and~~ 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.

1. "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.

¹The term spouse includes domestic partner.

2. “Relative”:
 - a. The employee’s spouse¹, parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law;
 - b. The spouse of the employee’s parent, step-parent, child, sibling, step-sibling, son-in-law or daughter-in-law.
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/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:

3. 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.

4. 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:

- 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.
5. Upon request by the employee, the source will give notice of the value of the merchandise, goods, or services received.
 6. 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:

7. 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
8. 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:

9. Gifts from “relatives” and “members of the household” are permitted in an unlimited amount; they are not considered gifts under the ethics rules;
10. Informational or program material, publications, or subscriptions related to the recipient’s performance of official duties;

11. Food, lodging, and travel generally count toward the \$50 aggregate amount per year from a single source with a legislative/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.
12. 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;
13. 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);
14. 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;
15. 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;
16. 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

Legal Reference(s):

[ORS 244.010](#) to -244.400
[ORS 332.016](#)

[ORS 659A.309](#)

[OAR 199-005-0003](#) to -199-020-0020
[OAR 584-020-0040](#)

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

Oregon School Boards Association

Selected Sample Policy

Code: **GBC-AR**
Revised/Reviewed:

Staff Ethics

District employees are allowed financial benefits as identified in ORS 244.040(2), such as their official compensation package, reimbursed expenses, limited honoraria and unsolicited awards for professional achievement. District employees are prohibited from using or attempting to use his/her district position to obtain a financial gain or to avoid a financial detriment for the district employee, a relative or member of the household of the employee, or any business with which the employee or a relative or member of the household of the employee is associated, if the opportunity for financial gain or avoidance of a financial detriment would not otherwise be available but for the employee's position with the district. Specifically, this means that:

1. Employees will not use district equipment for personal use, unless it is available to a significant segment of the general public. This includes, but is not limited to, the personal use of the district's:
 - a. Fax machine¹;
 - b. Phones to make long distance personal calls;
 - c. District vehicles;
 - d. Professional technology equipment (e.g., wood shop, automotive shop, CAD); and
 - e. Athletic facilities (e.g., pool or weight room).

Further, the district's supplies, facilities, equipment, employees, records or any other public resources are not to be used to engage in private business interests. For example, the district's computer cannot be used to sell products on an auction website during school hours.

2. When employees are traveling on official district business, any gift given because of this travel must be either declined or passed on to the district for use for future district travel. For example, if the hotel where the employee is staying gives the employee a free night's stay on a future visit, this must be declined or given back to the district for future district travel. The frequent flyer miles earned when traveling on official district business can only be used for district travel. If the employee's spouse is traveling with the employee, the employee is responsible for all additional charges (i.e., additional room charge).
3. Employees may not use personal credit cards for district travel or other district business and receive incentives such as cash reimbursements, frequent flyer miles and other benefits based upon the dollar amount of purchases made.
4. Employees may not use discounts offered by private companies for the employee's personal benefit if the discount is only offered because of the employee's official position. For example, an office supplies store provides all teachers a 10 percent discount. Because the teachers are receiving this discount only because of their official position, they cannot use the discount to purchase personal items. Teachers may use the discount to purchase items for district use. Employees can also accept

¹The district could establish a fee schedule that would allow only district employees to pay for the personal use of the district fax machines. If the district established a fee schedule for the use of fax machines the fee schedule must be equal to or exceed the prevailing rates offered at commercial businesses.

the discount if it is also available to a substantial segment of the population who are not public officials.

5. Employees may accept free passes to district extracurricular events if they are attending these events in their official capacity (i.e., chaperoning, ticket sales or managing concession sales). In order to promote employee participation in extracurricular activities, the district may include free passes in employees' official compensation packages or employees may be reimbursed by the district for the cost of admission.
6. The employee's district position is not to be used to take official action that could have a financial impact on a private business with which, the employee, or a relative or member of the employee's household are associated. For example, if the employee's brother owns a pest-control business which is seeking a contract with the district, the employee must declare an actual conflict of interest in writing, describing the nature of the employee's conflict, and provide this to the employee's supervisor.
7. Confidential information gained as a district employee is not to be used to obtain a financial benefit for the employee, a relative or member of the public official's household or a business with which any are associated. For example, the employee should not use the information that a student in his/her class is falling behind in math to provide the parents a referral to the employees' sister's tutoring business.
8. District employees who mentor student teachers may not receive direct payments from sponsoring colleges or universities. The payment may be provided by the college or university to the district, which can then distribute the compensation to the teachers as an element of their official compensation package.
9. District employees must follow Oregon Government Ethics Commission guidelines for outside employment if the employee acts as a chaperone for student group trips on personal time and the district employee accepts compensation in the form of travel expenses from a private business or organization. Specifically, district employees must conduct all activities related to the trip on personal time and cannot use the classroom or school environment to plan the off-campus trip. Employees may use district facilities for this purpose only if they comply with the district's public use of facilities policy. It is not an ethics violation to accept reasonable expenses for accompanying students on an education trip.

These restrictions do not apply if the teacher is chaperoning students on a fact-finding mission that is officially sanctioned by the Board. The definition of a "fact-finding mission" is, in part, any activity related to a cultural or educational purpose. *See* OAR 199-005-0020(3)(a). The district employee must be directly and immediately associated with the event or location being visited. If a district employee only acts as a chaperone and does not provide instruction or guidance for the students in language usage or cultural events, the trip may not meet the requirements of ORS 244.020(6)(H)(i). Further, the employee can only accept the reimbursement of reasonable travel expenses from the private company, not any further compensation.

These restrictions do not apply if the district compensates the district employee for chaperoning the trip.

Oregon School Boards Association

Selected Sample Policy

Code: **GBN/JBA**
Adopted:

Sexual Harassment

The Board is committed to the elimination of sexual harassment in district schools and activities. Sexual harassment is strictly prohibited and shall not be tolerated. This includes sexual harassment of students, staff or third parties by other students, staff, Board members or third parties. "Third parties" include, but are not limited to, school volunteers, parents, school visitors, service contractors or others engaged in district business, such as employees of businesses or organizations participating in cooperative work programs with the district and others not directly subject to district control at interdistrict and intradistrict athletic competitions or other school events. "District" includes: district facilities; district premises and nondistrict property if the student or employee is at any district-sponsored, district-approved or district-related activity or function, such as field trips or athletic events, where students are under the control of the district; or where the employee is engaged in district business. The prohibition also includes off duty conduct which is incompatible with district job responsibilities.

Sexual harassment of students and staff shall include, but is not limited to, unwelcome sexual advances, requests for sexual favors and other verbal, nonverbal or physical conduct of a sexual nature when:

1. The conduct or communication has the purpose or effect of demanding sexual favors in exchange for benefits;
2. Submission to or rejection of the conduct or communication is used as the basis for educational decisions affecting a student or employment or assignment of staff;
3. The conduct or communication is so severe, persistent or pervasive that it has the purpose or effect of unreasonably interfering with a student's educational performance or with an employee's ability to perform his/her job; or creates an intimidating, offensive or hostile educational or working environment. Relevant factors to be considered will include, but not be limited to, did the individual view the environment as hostile; was it reasonable to view the environment as hostile; the nature of the conduct; how often the conduct occurred and how long it continued; age and sex of the complainant; whether the alleged harasser was in a position of power over the student or staff member subjected to the harassment; number of individuals involved; age of the alleged harasser; where the harassment occurred; and other incidents of sexual harassment at the school involving the same or other students or staff.

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

All complaints about behavior that may violate this policy shall be promptly investigated. Any student or employee who has knowledge of conduct in violation of this policy or feels he/she is a victim of sexual harassment must immediately report his/her concerns to the principal, compliance officer or superintendent, who has overall responsibility for all investigations. A student may also report concerns to a teacher, counselor or school nurse, who will promptly notify the appropriate district official. The student and the student's parents or staff member who initiated the complaint shall be notified of the findings of the investigation and, if appropriate, that remedial action has been taken.

The initiation of a complaint in good faith about behavior that may violate this policy shall not adversely affect the educational assignments or study environment of a student complainant or any terms or conditions of employment or work environment of the staff complainant. There shall be no retaliation by the district against any person who, in good faith, reports, files a complaint or otherwise participates in an investigation or inquiry of sexual harassment.

It is the intent of the Board that appropriate corrective action will be taken by the district to stop the sexual harassment, prevent its recurrence and address negative consequences. Students in violation of this policy shall be subject to discipline up to and including expulsion and/or counseling or sexual harassment awareness training, as appropriate. The age and maturity of the student(s) involved and other relevant factors will be considered in determining appropriate action. Employees in violation of this policy shall be subject to discipline, up to and including dismissal and/or additional sexual harassment awareness training, as appropriate. Other individuals whose behavior is found to be in violation of this policy shall be subject to appropriate sanctions as determined and imposed by the superintendent or Board.

Additionally, the district may report individuals in violation of this policy to law enforcement officials. Licensed staff, staff registered with the Teacher Standards and Practices Commission (TSPC) and those participating in practicum programs, as specified by Oregon Administrative Rules, shall be reported to TSPC.

The superintendent shall ensure appropriate periodic sexual harassment awareness training or information is provided to all supervisors, staff and students and that annually, the name and position of district officials responsible for accepting and managing sexual harassment complaints, business phone numbers, addresses or other necessary contact information is readily available. This policy as well as the complaint procedure will be made available to all students, parents of students and staff. The district's policy shall be posted in grade 6 through 12 schools. Such posting shall be by a sign of at least 8 1/2" by 11".

The superintendent will establish a process of reporting incidents of sexual harassment.

END OF POLICY

Legal Reference(s):

[ORS 243.706](#)
[ORS 342.700](#)
[ORS 342.704](#)
[ORS 342.708](#)
[ORS 342.850](#)

[ORS 342.865](#)
[ORS 659.850](#)
[ORS 659A.006](#)
[ORS 659A.029](#)
[ORS 659A.030](#)

[OAR 581-021-0038](#)
[OAR 584-020-0040](#)
[OAR 584-020-0041](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2006).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2006).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2006); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2006).

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

Oregon School Boards Association Selected Sample Policy

Code: **GBNA**
Adopted:

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

The Board is committed to providing a positive and productive learning and working environment. Hazing, harassment, intimidation, bullying, menacing, and acts of cyberbullying of staff, students or third parties by staff, students or third parties is strictly prohibited and shall not be tolerated in the district. Retaliation against any person who reports, is thought to have reported, files a complaint or otherwise participates in an investigation or inquiry is also strictly prohibited.

Staff whose behavior is found to be in violation of this policy will be subject to discipline, up to and including dismissal. Third parties whose behavior is found to be in violation of this policy shall be subject to appropriate sanctions as determined and imposed by the superintendent or Board.

Individuals may also be referred to law enforcement officials. Licensed staff will be reported to Teacher Standards and Practices Commission, as provided by OAR 584-020-0041.

The superintendent is directed to develop administrative regulations to implement this policy. Regulations shall include descriptions of prohibited conduct, reporting and investigative procedures and provisions to ensure annual notice of this policy is provided to students, staff and third parties.

END OF POLICY

Legal Reference(s):

[ORS 163.190](#)

[ORS 163.197\(2\)](#)

[ORS 166.065](#)

[ORS 166.155 to -166.165](#)

[ORS 332.072](#)

[ORS 332.107](#)

[ORS 659A.030](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2006).

Oregon School Boards Association Selected Sample Policy

Code: **GBNA-AR**
Revised/Reviewed:

Hazing/Harassment/Intimidation/Bullying/Menacing/Cyberbullying Complaint Procedures – Staff

The following definitions and procedures shall be used for reporting, investigating and resolving complaints of hazing, harassment, intimidation, bullying, menacing and acts of cyberbullying.

Definitions

1. “Third parties” include, but are not limited to, coaches, school volunteers, parents, school visitors, service contractors or others engaged in district business, such as employees of businesses or organizations participating in cooperative work programs with the district and others not directly subject to district control at interdistrict and intradistrict athletic competitions or other school events.
2. “District” includes district facilities, district premises and nondistrict property if the employee is at any district-sponsored, district-approved or district-related activity or function, such as field trips, athletic events or where the employee is engaged in district business.
3. “Hazing” includes, but is not limited to, any act that recklessly or intentionally endangers the mental health, physical health or safety of a student/staff member for the purpose of initiation or as a condition or precondition of attaining membership in, or affiliation with, any district-sponsored work activity, work group or work assignment, grade level attainment, (i.e., personal servitude, sexual stimulation/sexual assault, forced consumption of any drink, alcoholic beverage, drug or controlled substance, forced exposure to the elements, forced prolonged exclusion from social contact, sleep deprivation or any other forced activity that could adversely affect the mental or physical health or safety of a student/staff); requires, encourages, authorizes or permits another to be subject to wearing or carrying any obscene or physically burdensome article; assignment of pranks to be performed or other such activities intended to degrade or humiliate regardless of the person’s willingness to participate.
4. “Harassment” includes, but is not limited to, any act which subjects an individual or group to unwanted, abusive behavior of a nonverbal, verbal, written or physical nature on the basis of age, race, religion, color, national origin, disability or sexual orientation.
5. “Intimidation” includes, but is not limited to, any threat or act intended to tamper, substantially damage or interfere with another’s property, cause substantial inconvenience, subject another to offensive physical contact or inflict serious physical injury on the basis of race, color, religion, national origin, or sexual orientation.
6. “Cyberbullying” means the use of any electronic communication device to convey a message in any form (text, image, audio or video) that intimidates, harasses or otherwise harms, insults or

humiliates another in a deliberate, repeated or hostile and unwanted manner under a person's true or false identity.

7. "Menacing" includes, but is not limited to, any act intended to place a district employee, student or third party in fear of imminent serious physical injury.

Retaliation/False Charges

Retaliation against any person who reports, is thought to have reported, files a complaint or otherwise participates in an investigation or inquiry is prohibited. Such retaliation shall be considered a serious violation of Board policy and independent of whether a complaint is substantiated. False charges shall also be regarded as a serious offense and will result in disciplinary action or other appropriate sanctions.

Complaint Procedures

Principals and the superintendent have responsibility for investigations concerning hazing, harassment, intimidation, bullying, menacing and acts of cyberbullying. The investigator(s) shall be a neutral party having had no involvement in the complaint presented.

Any employee who has knowledge of conduct in violation of Board policy JFCF-Hazing/Harassment/Intimidation/Bullying/Menacing/Cyberbullying, shall immediately report his/her concerns to the designated district official.

Any employee or third party who has knowledge of conduct in violation of Board policy or feels he/she has been hazed, harassed, intimidated, bullied, cyberbullied or menaced in violation of Board policy or this administrative regulation is encouraged to immediately report his/her concerns to the designated district official.

Complaints will be promptly investigated in accordance with the following procedures:

- Step 1 Any hazing, harassment, intimidation, bullying, menacing or acts of cyberbullying information (complaints, rumors, etc.) shall be presented to the principal. Complaints against the principal shall be filed with the superintendent. Information may be presented anonymously. Complaints against the superintendent shall be filed with the Board chair. All such information will be reduced to writing and will include the specific nature of the offense and corresponding dates.
- Step 2 The district official receiving the complaint shall promptly investigate. Parents will be notified of the nature of any complaint involving their student. The district official will arrange such meetings as may be necessary with all concerned parties within five working days after receipt of the information or complaint. The parties will have an opportunity to submit evidence and a list of witnesses. All findings related to the complaint will be reduced to writing. The district official(s) conducting the investigation shall notify the complainant and parents as appropriate, in writing, when the investigation is concluded and a decision regarding disciplinary action, as warranted, is determined.

A copy of the notification letter or the date and details of notification to the complainant, together with any other documentation related to the incident, including disciplinary action taken or recommended, shall be forwarded to the superintendent.

- Step 3 If the complainant is not satisfied with the decision at Step 2, he/she may submit a written appeal to the superintendent or designee. Such appeal must be filed within 10 working days after receipt of the Step 2 decision. The superintendent or designee will arrange such meetings with the complainant and other affected parties as deemed necessary to discuss the appeal. The superintendent or designee shall provide a written decision to the complainant's appeal within 10 working days.
- Step 4 If the complainant is not satisfied with the decision at Step 3, a written appeal may be filed with the Board. Such appeal must be filed within 10 working days after receipt of the Step 3 decision. The Board shall, within 20 working days, conduct a hearing at which time the complainant shall be given an opportunity to present the complaint. The Board shall provide a written decision to the complainant within 10 working days following completion of the hearing.

Direct complaints related to employment may be filed with the Oregon Bureau of Labor and Industries, Civil Rights Division, or the U.S. Department of Labor, Equal Employment Opportunities Commission.

Documentation related to the incident may be maintained as a part of the employee's personnel file. Additionally, a copy of all hazing, harassment, intimidation, bullying, menacing or acts of cyberbullying complaints and documentation will be maintained as a confidential file in the district office.

Oregon School Boards Association Selected Sample Policy

Code: **GCAB**
Adopted:

Personal ~~Communication~~ Electronic Devices and Social Media - Staff **

Staff possession or use of personal ~~communication~~ electronic devices on district property, in district facilities during the work day and while the staff is on duty in attendance at district-sponsored activities may be permitted subject to the limitations set forth in this policy and consistent with any additional school rules as may be established by the superintendent. At no time, whether on duty or off duty, will a personal ~~communication~~ electronic device be used in a manner that interferes with staff duty and responsibility for the supervision of students.

A “personal electronic device” is a device, not issued by the district, is capable of electronically communicating, sending, receiving, storing, recording, reproducing, and/or displaying information and data.

Personal electronic devices shall be silenced during instructional or class time, while on duty or at any other time where such use of the device would cause a disruption of school activities or interfere with work assignment. Devices which have the capability to take photographs or record video or audio shall not be used for such purposes while on district property or while a staff member is on duty in district-sponsored activities, unless as expressly authorized by the principal or designee for a use directly related to and consistent with the employee’s assigned duties. Computers, tablets, iPads or similar devices brought to school will be restricted to academic activities during on duty time.

The district will not be liable for loss or damage to personal electronic devices brought to district property and district-sponsored activities.

Staff members, while on duty and off duty, will utilize social media websites, public websites and blogs, judiciously by not posting confidential information about students, staff or district business.¹ Staff may not post images of district facilities, staff, students, volunteers or parents without written authorization from persons with authority to grant such a release. Staff members, while on duty and off duty, will treat fellow employees, students and the public with respect while posting on social media websites, etc., in order to prevent substantial disruption in school. Communication with students using personal electronic devices will be appropriate and professional. Communication with students using personal electronic devices regarding nonschool-related matters is prohibited during work hours and strongly discouraged at all other times. If communicating with students electronically regarding school-related matters, staff should use district e-mail using mailing lists to a group of students rather than individual students. Texting students during work hours is discouraged. Texting students while off duty is strongly discouraged.

Exceptions to the prohibitions set forth in this policy may be made for health, safety or emergency reasons with superintendent or designee approval.

Staff are subject to disciplinary action up to and including dismissal for using a personal electronic device in any manner that is illegal or violates the terms of this policy. Staff actions on social media websites, public websites; and blogs, while on or off duty, which disrupt the school environment, are subject to

¹Nothing in this policy is intended in any form to limit the right of employees to engage in protected labor activities via the use of social media.

disciplinary action up to and including dismissal. A “disruption”¹ for purposes of this policy includes, but is not limited to, one or more parent threatens to remove their children from a particular class or particular school, actual withdrawal of a student or students from a particular class or particular school and/or a threatened or actual negative impact on the learning environment. The taking, disseminating, transferring or sharing of obscene, pornographic or otherwise illegal images or photographs, whether by electronic data transfer or otherwise (commonly called texting, sexting, emailing etc.) may constitute a crime under state and/or federal law. Any person taking, disseminating, transferring or sharing obscene, pornographic or otherwise illegal images or photographs, will be reported to law enforcement and/or other appropriate state or federal agencies.

Licensed staff are subject at all times to the Standards of Competent and Ethical Performance for Teachers. (See Board policy GCAA)

The superintendent shall ensure that this policy is available to all employees.

END OF POLICY

Legal Reference(s):

[ORS 167.057](#)
[ORS 163.432](#)
[ORS 163.433](#)
[ORS 163.684](#)
[ORS 163.686](#)
[ORS 163.687](#)

[ORS 163.688](#)
[ORS 163.689](#)
[ORS 163.693](#)

[ORS 163.700](#)
[ORS 326.011](#)

[ORS 326.051](#)
[ORS 332.072](#)
[ORS 332.107](#)
[ORS 336.840](#)

U.S. CONST. amend. XVIII, § 1466A

U.S. CONST. amend. XVIII, § 1470

U.S. CONST. amend. XX, § 7906

U.S. CONST. amend. XX, § 6777

Copyrights, Title 17, as amended, United States Code; 19 CFR Part 133 (2001).

Melzer v. Bd. Of Educ., City of New York, 336 F.3d 185 (2d Cir. 2003).

Ross v. Springfield Sch. Dist., No. FDA 80-1, aff'd, 56 Or. App. 197, rev'd and remanded, 294 Or. 357 (1982), order on remand (1983), aff'd, 71 Or. App. 111 (1984), rev'd and remanded, 300 Or. 507 (1986), order on second remand (1987), revised order on second remand (1988).

Oregon School Boards Association Selected Sample Policy

Code: **IIA**
Adopted:

Instructional Resources/Instructional Materials (Version 1)

The Board is responsible for the selection of instructional materials. The Board delegates to district professional personnel the authority for the selection of instructional and library [media] materials in accordance with the policy below.

Selection Objectives

When reviewing and selecting instructional materials, the objectives will be:

1. To select materials that will provide improvements in content, organization and teaching methods;
2. To ensure accurate and up-to-date content that includes new concepts, insights and facts;
3. To provide for sequential growth from level to level;
4. To provide a fair representation of the many religious, ethnic and cultural groups and their contributions to our American heritage;
5. To provide recognition of minority groups and women by placing them frequently in positions of leadership and example. There will be no discrimination or bias or prejudice toward sex, sexual orientation, race, religion, national origin, marital status, disability or age.

The district will establish a process and timeline for regularly determining and considering whether the textbooks and other instructional materials are available through online resources that enable students with print disabilities to receive textbooks and instructional materials free of charge.

Textbooks and other instructional materials adopted by the Board shall be selected by the appropriate professional personnel in consultation with parents and citizens. The input of staff and students will be encouraged. Final decisions on purchase will rest with the superintendent or designee, subject to official adoption by the Board in the case of textbooks and other instructional materials.

Selection Criteria

All materials selected will be consistent with the following principles:

6. Materials that enrich and support the curriculum, taking into consideration the varied interests, abilities and maturity levels of the students served;
7. Materials that stimulate growth in factual knowledge, literary appreciation, aesthetic values and ethical standards;

8. A background of information which will enable students to make intelligent judgments in their daily lives;
9. Materials on opposing sides of controversial issues, so that young citizens may develop, under guidance, the practice of analytical reading and thinking;
10. Materials representative of the many religious, ethnic and cultural groups, showing their contributions to our heritage.

The above principles will serve as a guide in the selection of all instructional and library [media] materials.

To be in compliance with the requirements of federal law, the Board directs the superintendent to distribute curriculum materials and instructional supplies to district schools in such a manner that ensures all schools receive equivalent materials.

Any resident or employee may challenge the appropriateness of the district's instructional materials. The district will provide a procedure to process such challenges.

END OF POLICY

Legal Reference(s):

ORS 336.035	ORS 337.260	OAR 581-021-0045
ORS 336.840	ORS 337.511	OAR 581-021-0046
ORS 337.120	ORS 339.155	OAR 581-022-1140
ORS 337.141		OAR 581-022-1520
ORS 337.150	OAR 581-011-0050 to -0117	OAR 581-022-1640

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

Oregon School Boards Association

Selected Sample Policy

Code: **IK**
Adopted:

Academic Achievement**

The Board believes it is important that teachers have as much accurate knowledge of student achievement as possible to assess students' needs and growth; thus, a sharing of information among parent, teacher and student is essential.

The district shall ensure that all students have the opportunity to demonstrate progress toward mastery of the knowledge and skills of the student's current grade level or course content level. Students who have not yet met or who exceed all of the standards at any grade level, will be offered additional services or alternative educational or public school options.

The Board directs staff to follow these guidelines in measuring and determining student progress:

1. Parents and students may be informed at least annually, of their student's progress toward achieving the academic content standards, including but not limited to:
 - a. Information on progress in each subject area to meet or exceed the academic content standards at the student's current grade level or course content level, including major goals used to determine the information;
 - b. Specific evidence of student progress toward mastery of a continuum of academic knowledge and skills (academic content standards) of a subject area, upon request from a parent;
 - c. Evidence of the student's progress in a continuum of knowledge and skills that are not academic and that may include student behaviors that are defined by the district;
 - d. Student scores on all state and local assessments indicating any of the requirements that have been waived for the district or the individual and time periods for the waiver; and
 - e. Student progress toward completion of diploma requirements to parents of students in grades 9-12, including credits earned, demonstration of extended application and demonstration of the Essential Skills.
2. Parents will be alerted and conferred with as soon as possible when a student's performance or attitude becomes unsatisfactory or shows marked or sudden deterioration;
3. Grades and/or portfolio content assessment will be based upon academic performance and will not include student attitude or behavior. Grades will not be used for disciplinary purposes. Absenteeism or misconduct shall not be the sole criterion for the reduction of a student's grade. Behavior performance shall be reported separately;
4. At comparable levels, the school system will strive for consistency in grading and reporting except when this consistency is inappropriate for certain classes or certain students;
5. When no grades are given but the student is evaluated in terms of progress, the school staff will also provide a realistic appraisal of the student's standing in relation to his/her peers;

6. The staff will take particular care to explain to parents the meaning of marks and symbols used to reflect student performance.

END OF POLICY

Legal Reference(s):

[ORS 107](#).154

[ORS 329](#).485

[ORS 343](#).295

[OAR 581-021](#)-0022

[OAR 581-022](#)-1660

[OAR 581-022](#)-1670

Oregon School Boards Association Selected Sample Policy

Code: **IKA**
Adopted:

Grading and Reporting System**

The district's reporting system shall be based on Board-adopted course content and clearly show the student and parent whether the student is achieving course requirements at the student's current grade level; or course content level; shall be based on the student's progress toward mastery of a continuum of academic knowledge and skills; and may be based on the student's progress in a continuum of knowledge and skills that are not academic and that may include student behaviors that are defined by the district. Absenteeism or misconduct shall not be the sole criterion for the reduction of a student's grades.

Letter grades will be used in the district.

Grading will be conducted on a [nine-week] basis. The [nine-week] grade will be based on many factors, such as: basic assignments, both oral and written; class participation; special assignments; research; activities of various types and kinds; and special contributions.

At the beginning of the grading period students and parents will be informed regarding the basis of the grades and the methods to be used in determining them.

END OF POLICY

Legal Reference(s):

[ORS 329.485](#)

[OAR 581-021-0022](#)

[OAR 581-022-1670](#)

Oregon School Boards Association Selected Sample Policy

Code: **IKAB**
Adopted:

Student Progress Reports to Parents**

Parents may be annually informed of their student's progress toward achieving the academic content standards, including but not limited to:

1. Information on progress in each subject area to meet or exceed the academic content standards of the student's current grade level or course content level, including major goals used to determine the information;
2. Specific evidence of student progress toward mastery of a continuum of academic knowledge and skills (academic content standards) of a subject area, upon request from a parent;
3. Evidence of the student's progress in a continuum of knowledge and skills that are not academic and that may include student behaviors that are defined by the district;
4. Student scores on all state and local assessments indicating any of the requirements that have been waived for the district or the individual and time periods for the waiver; and
5. Student progress toward completion of diploma requirements to parents of students in grades 9-12, including credits earned, demonstration of extended application and demonstration of the Essential Skills.

The school will report a student's progress to the student and to his/her parents. The report will be clear, concise and accurate, and will provide a basis of understanding among teachers, parents and students for the benefit of the individual student. The Board directs the administration to develop progress report forms or cards in accordance with this policy.

In an effort to promote effective communications with individuals with disabilities, the school will provide progress reports in an alternative format upon request and with appropriate advance notice.

Full consideration will be given to the requests of the person with a disability in the selection of appropriate auxiliary aids and services.

END OF POLICY

Legal Reference(s):

[ORS 107.154](#)

[ORS 329.485](#)

[OAR 581-022-1670](#)

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).

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). Americans with Disabilities Act Amendments Act of 2008.

Oregon School Boards Association Selected Sample Policy

Code: **ING-AR**
Revised/Reviewed:

Animals in District Facilities

Please provide the following information about the service animal¹.

1. Parent/Staff and/or emergency contact information: _____

2. Is the service animal required due to a disability? ☐ Yes ☐ No
3. Describe the nature of the work or task the service animal is trained, or is being trained to do or perform to² meet the student's/staff's individual needs:

6/12/14 | RS

¹The American with Disabilities Act definition of "service animal" means any dog that is individually trained to do work or perform tasks for the benefit of an individual with a disability, including a physical, sensory, psychiatric, intellectual or other mental disability. Other species of animals, whether wild or domestic, trained or untrained, are not service animals for the purposes of this definition. The work or tasks performed by a service animal must be directly related to the individual's disability. Examples of work or tasks include, but are not limited to, assisting individuals who are blind or have low vision with navigation and other tasks, alerting individuals who are deaf or hard of hearing to the presence of people or sounds, providing non-violent protection or rescue work, pulling a wheelchair, assisting an individual during a seizure, alerting individuals to the presence of allergens, retrieving items such as medicine or the telephone, providing physical support and assistance with balance and stability to individuals with mobility disabilities, and helping persons with psychiatric and neurological disabilities by preventing or interrupting impulsive or destructive behaviors. The crime deterrent effects of an animal's presence and the provision of emotional support, well-being, comfort, or companionship do not constitute work or tasks for the purposes of this definition. The law and its regulations also make an allowance for miniature horses.

²The district may request this information if the nature of the work or task the assistance animal is trained, or is being trained to do or perform, is not readily apparent.

Oregon School Boards Association Selected Sample Policy

Code: **JFCEB**
Adopted:

Personal Electronic Devices and Social Media**

(Student may possess a personal electronic device)

Students may be allowed to use and possess personal electronic devices on district property and at district-sponsored activities provided such devices are not used in any manner that may disrupt the learning environment or district-sponsored activities, or violate Board policies, administrative regulations, school or classroom rules, state and federal law.¹

As used in this policy, a “personal electronic device (PED)” is a device is capable of electronically communicating, sending, receiving, storing, recording, reproducing and/or displaying information and data.

If the district implements a curriculum that uses technology, students may be allowed to use their own personal electronic devices to access the curriculum. Students who are allowed to use their own devices to access the curriculum will be granted access to any application or electronic materials when they are available to students who do not use their own devices, or provided free of charge to students who do not use their own devices for curriculum.

Students may not access social media websites using district equipment, while on district property or at district-sponsored activities unless the access is approved by a district representative

The district will not be liable for personal electronic devices brought to district property and district-sponsored activities. The district will not be liable for information or comments posted by students on social media websites when the student is not engaged in district activities and not using district equipment.

The superintendent is directed to develop administrative regulations and/or approve school rules as necessary to ensure that student use of such devices is consistent with this policy. Administrative regulations may include grade- or age-level possession and/or use restrictions by students on district property and at district-sponsored activities; consequences for violations; a process for responding to a student’s request to use a personal electronic device, including an appeal process if the request is denied; and such other provisions as the superintendent may deem necessary. The superintendent is responsible for ensuring that pertinent provisions of Board policies, administrative regulations and school rules governing personal electronic devices are included in staff handbooks and student/parent handbooks, reviewed annually and updated as necessary.

END OF POLICY

¹The taking, disseminating, transferring or sharing of obscene, pornographic or otherwise illegal images or photographs, whether by electronic data transfer or otherwise (commonly called texting, sexting, emailing, etc.) may constitute a crime under state and/or federal law. Any person taking, disseminating, transferring or sharing obscene, pornographic or otherwise illegal images or photographs will be reported to law enforcement and/or other appropriate state or federal agencies.

Legal Reference(s):

[ORS 332](#).107

[ORS 336](#).840

Copyrights, 17 U.S.C. §§ 101- 1332; 19 C.F.R. Part 133 (2006).

Oregon School Boards Association Selected Sample Policy

Code: **JFCEB-AR**
Revised/Reviewed:

Personal Electronic Devices and Social Media

Students may use and possess personal electronic devices on district grounds subject to the following:

1. Personal electronic devices shall not be used in a manner that disrupts the educational process, school programs or activities, or in a manner that violates law, Board policy, administrative regulation or school rules;¹
2. Unless as authorized in advance by the principal or designee for health or safety reasons, or in the event of an emergency situation that involves imminent physical danger, devices shall be turned on and operated only before and after the regular school day. Personal electronic devices may be used during the student's lunch break. They may not be used at any time in the proximity of any class, school activity or event that may be in session or in progress during those times;
3. Personal electronic devices which have the capability to take photographs or record video or audio shall not be used for such purposes while on district property or at district-sponsored events unless as expressly authorized in advance by the principal or designee;
4. The district shall not be responsible for loss, theft or damage to personal electronic devices brought to district property or district-sponsored events;
5. Personal electronic devices may be used as electronic study aids during the school day if provided as a part of a student's individualized education plan (IEP); or if permission is received from the student's teacher;
6. The use of personal electronic devices in any way to send or receive messages, data or information that would pose a threat to academic integrity, contribute to or constitute academic dishonesty is strictly prohibited;
7. The use of personal electronic devices in any manner that would violate the confidentiality or privacy rights of another individual is strictly prohibited;
8. Students shall comply with any additional school rules as established by the principal and classroom rules as approved by the principal concerning the appropriate use of personal electronic devices;
9. Personal electronic devices used in violation of law, Board policy, administrative regulation or approved school rules will be confiscated, turned in to the school office and returned to the student

¹The taking, disseminating, transferring or sharing of obscene, pornographic or otherwise illegal images or photographs, whether by electronic data transfer or otherwise (commonly called texting, sexting, emailing, etc.) may constitute a crime under state and/or federal law. Any person taking, disseminating, transferring or sharing obscene, pornographic or otherwise illegal images or photographs will be reported to law enforcement and/or other appropriate state or federal agencies.

or parent following parent notification, conference, detention, suspension, expulsion and/or referral to law enforcement officials as appropriate;

10. Students may not access social media websites using district equipment, while on district property or at district-sponsored activities unless the access is approved by a district representative.

Oregon School Boards Association Selected Sample Policy

Code: **JGAB**
Adopted:

Use of Restraint and Seclusion

The Board is dedicated to the development and application of best practices within the district's public educational/behavioral programs. It is the intent of the Board to establish a policy that defines the circumstances that must exist and the requirements that must be met prior to, during and after the use of physical restraint and/or seclusion as an intervention with district students.

Definitions

1. "Physical restraint" means the restriction of a student's movement by one or more persons holding the student or applying physical pressure upon the student. "Physical restraint" does not include touching or holding a student without the use of force for the purpose of directing the student or assisting the student in completing a task or activity. The definition of "physical restraint" does not include the use of mechanical, chemical or prone restraint of a student as these methods are prohibited by Oregon law.
2. "Seclusion" means the involuntary confinement of a student alone in a room from which the student is physically prevented from leaving.

Seclusion does not include the removal of a student for a short period of time to provide the student with an opportunity to regain self-control, in a setting from which the student is not physically prevented from leaving.

3. "Serious bodily injury" means any significant impairment of the physical condition of a person, as determined by qualified medical personnel, whether self-inflicted or inflicted by someone else.
4. "Mechanical restraint" means a device used to restrict the movement of a student or the movement or normal function of a portion of the body of a student.

Mechanical restraint does not include:

- a. A protective or stabilizing device ordered by a licensed physician; or
 - b. A vehicle safety restraint when used as intended during the transport of a student in a moving vehicle.
5. "Chemical restraint" means a drug or medication that is used on a student to control behavior or restrict freedom of movement that has not been prescribed by a licensed health professional or other qualified health care professional acting under the professional's scope of practice.
 6. "Prone restraint" means a restraint in which a student is held face down on the floor.

The use of physical restraint and/or seclusion is only permitted as a part of a behavioral support plan when other less restrictive interventions would not be effective and the student's behavior poses a threat of imminent, serious physical harm to the student or others.

Except in the case of an emergency, only staff current in the required training in accordance with the district-designated physical restraint and seclusion training program will implement physical restraint or seclusion with a student. In an emergency, physical restraint and/or seclusion may also be used by a school administrator, teacher or other school employee [or volunteer] as necessary when the student's behavior imposes a reasonable threat of imminent, serious bodily injury to the student or to others. The use of physical restraint or seclusion under these circumstances is only allowed so long as the student's behavior poses a threat of imminent, serious physical harm to themselves or to others. Any student being restrained or secluded within the district whether in an emergency or as a part of a plan shall be constantly monitored by staff for the duration of the intervention. Any room used for seclusion of a student must meet the standards as outlined in OAR 581-021-0568.

The district shall utilize the [] training program of physical restraints and seclusion for use in the district. As required by state regulation, the selected program shall include: behavioral support, prevention, de-escalation and crisis response techniques. Any program selected by the district must be in compliance with state and federal law with respect to the use of restraint and/or seclusion.

An annual review of the use of physical restraint and seclusion during the preceding school year shall be completed and submitted to the Superintendent of Public Instruction to ensure compliance with district policies and procedures.

The results of the annual review shall be documented and shall include at a minimum:

7. The total number of incidents of physical restraint;
8. The total number of incidents of seclusion;
9. The total number of seclusions in a locked room;
10. The total number of students placed in physical restraint;
11. The total number of students placed in seclusion;
12. The total number of incidents that resulted in injuries or death to students or personnel as a result of the use of physical restraint or seclusion;
13. The total number of students placed in physical restraint and/or seclusion more than 10 times in a school year and an explanation of what steps have been taken by the district to decrease the use of physical restraint and seclusion for each student;
14. The total number of physical restraint and seclusion incidents carried out by untrained individuals;
15. The demographic characteristics of all students upon whom physical restraint and/or seclusion was imposed;

16. The total number of rooms available for use by the district for seclusion of a student and a description of the dimensions and design of the rooms.

This report shall be made available to the Board and to the public at the district's main office and on the district's website.

At least once each school year the public shall be notified as to how to access the report.

The district shall investigate all complaints regarding the use of restraint and/or seclusion practices according to the procedures outlined in Board policy KL and KL-AR - Public Complaints.

The superintendent shall develop administrative regulations to carry out the requirements set forth in this policy and to meet any additional requirements established by law related to the use, reporting and written documentation of the use of physical restraint or seclusion by district personnel.

END OF POLICY

Legal Reference(s):

[ORS 161.205](#)
[ORS 339.250](#)
[ORS 339.288](#)
[ORS 339.291](#)

[OAR 581-021-0061](#)
[OAR 581-021-0550](#)
[OAR 581-021-0553](#)
[OAR 581-021-0556](#)
[OAR 581-021-0559](#)

[OAR 581-021-0563](#)
[OAR 581-021-0566](#)
[OAR 581-021-0568](#)
[OAR 581-021-0569](#)
[OAR 581-021-0570](#)

Oregon School Boards Association Selected Sample Policy

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

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 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 March 1st.

¹The 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 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) - (x). 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) - (x), 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, individual 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. Proposals that minimally address or leave out any of the required components are not complete and [may] [will] be returned to the applicant.
- 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 20 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. 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;

OR

 - 3) 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.

(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) Insurance²:
 - (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;
 - (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;

²Insurance requirements for individual public charter schools may vary and should be reviewed by legal counsel and an insurance representative.

- (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) Public records law (ORS 192.410 to 192.505);
 - (3) Public meetings law (ORS 192.610 to 192.690);
 - (4) ORS Chapters 279A, 279B and 279C (Public Contracting Code);
 - (5) ORS 326.565, 326.575 and 326.580 (student records);
 - (6) Municipal audit law (ORS 297.405 to 297.555 and 297.990);
 - (7) Criminal records check (ORS 181.534, 326.603, 326.607, 342.223 and 342.232);
 - (8) Textbooks (ORS 337.150);
 - (9) ORS 339.119 (considerations for educational services);
 - (10) ORS 336.840 (use of personal electronic devices);
 - (11) Tuition and fees (ORS 339.141, 339.147 and 339.155);
 - (12) Discrimination (ORS 659.850, 659.855 and 659.860);
 - (13) Tort claims (ORS 30.260 to 30.300);
 - (14) ORS Chapter 657 (Employment Department law);

- (15) Health and safety statutes and rules;
 - (16) Any statute or rule listed in the charter;
 - (17) The statewide assessment system developed by the Oregon Department of Education (ODE) for Mathematics, Science and English under ORS 329.485 (2);
 - (18) The academic content standards and instruction (ORS 329.045);
 - (19) Any statute or rule that establishes requirements for instructional time;
 - (20) Prohibition of infliction of corporal punishment (ORS 339.250 (12));
 - (21) Reporting of suspected abuse of a child and sexual conduct, and training on prevention and identification of abuse and sexual conduct (ORS 339.370, 339.372, 339.388 and 339.400);
 - (22) Diploma, modified diploma, extended diploma and alternative certificate standards (ORS 329.451);
 - (23) Statutes and rules that expressly apply to public charter schools;
 - (24) Statutes and rules that apply to special government body ORS 174.117, or public body ORS 174.109;
 - (25) 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, 342.138 or 342.140.
 - 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) On or after July 1, 2011: failed 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.

Estimated Budget

Food Service Improvement Project

Option 1-Base Project

Item	Amount
Purchase and Installation of Walk-in Combination Freezer and Styrofoam Genie - including installation	35,000
Salad Bar	18,000
Metro Warmer	1,500
Small Wares (Pots, pans, tools)	1,500
Purchase of upgrade to our Food Service Technology	1,000
Construction of Asphalt Truck Loading Area	5,000
Construction of Roof Covering for Compound	45,000
Installation of Fencing	35,000
Cafeteria Tables	8,000
Architect Design and Oversight	22,000
Contingency	12,000
Total	13,000
	197,000

Estimated annual payment for financing over 10 years = \$24,000

October 21, 2014

Estimated Budget
Food Service Improvement Project
Option 2
Model Food Service Environmental Sensitive Program

Item	Amount
Purchase and Installation of Walk-in Combination Freezer	35,000
Styrofoam Genie - and Food Genie including installation	45,000
Waste Compactor, including installation	50,000
Salad Bar	1,500
Metro Warmer	1,500
Small Wares (Pots, pans, tools)	1,000
Purchase of upgrade to our Food Service Technology	5,000
Construction of Asphalt Truck Loading Area	45,000
Construction of Roof Covering for Compound	35,000
Installation of Fencing	8,000
Cafeteria Tables	22,000
Architect Design and Oversight	12,000
Contingency	13,000
Total	274,000

Estimated annual payment for financing over 10 years = \$33,500

Estimated annual reduction of disposal Costs – Reduce from 6 bins to 2 bins (one at LHS and one at Lundy) for disposal = 4 (removed) X \$105 per month X 12 months = \$5040.00

Additional electrical cost associated with the use of three machines not determined, yet will negatively impact the monthly electrical bill.

October 21, 2014



Protecting The Earth Today
For A Better Tomorrow

New LED Touch Screen
Command Center



StyroGenie Tech Sheet

StyroGenie SG-1200 recycling Styrofoam, reducing waste volume by 95% and offering a 100% recycling solution.

StyroGenie SG-1200 Specification:

Construction: The model SG-1200 is constructed with 16 gauge type 304 #4 polished stainless steel interior and exterior featuring a 1200 tray capacity. SG-1200 has a front facing/forward opening single door manufactured with three (3) independent stainless steel hinges, optional right or left hand opening, mounted to 11 Gauge stainless steel frame allowing lunch trays to be front loaded and not top loaded. Lower door shall be provided with continuous stainless steel hinge fully welded to stainless steel body. Both doors shall be equipped with timed safety interlocks and can only be opened when the unit is energized and the pass code has been entered into the command center and switched to the "Open Door" command. The unit shall be equipped with two (2) removable 14 gauge stainless steel catch pans with hemmed safety edges on all sides accessible from the front of the unit and shall include two (2) independent pan safety switches that prevent operation when pans are not removed for disposal of melted material then properly re-installed. Interior cabinet shall be vented thru sidewall and terminated into exterior stainless steel collection cup. Service of all major components shall be accessed from the front of the machine.

Operation: Security pass code must be entered into the LED touch screen and the "Start Melt Cycle" chosen. The SG-1200 is activated, "Melt Cycle Active" can be seen on the LED touch screen command center initiating the beginning of preset timed melt cycle. Upon completion of melt cycle "Safe to Open" will appear in the Command Center, The pass code will need to be entered and "Open Doors" chosen on the touch screen unlocking both the upper and lower doors. Each catch pan can be easily removed, emptied and replaced making the unit ready for the next cycle.

Safety Features: To prevent unauthorized use, the SG-1200 melt cycle can only be activated by entering the security pass code. Doors can only be opened with the proper pass code while the unit is energized. Additional safety features include safety interlock switches for doors and pans to prevent operation if doors are open or pans have not been removed and not properly replaced. Temperature sensors with a "Safe to Open" Command Center message will identify when the interior is cool and can be safely accessed. Redundant high limit sensors prevent overheating. Unit shall be listed and labeled by Underwriters Laboratories.

Your Zero Waste Solution

801.300.7246
www.wrtnow.com

As Manufactured By
StyroSmart Solutions

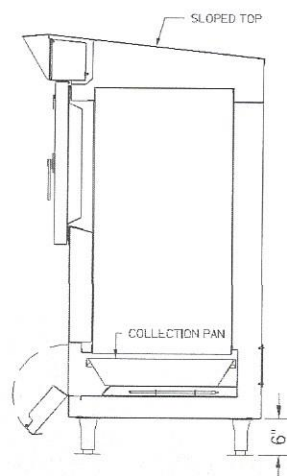
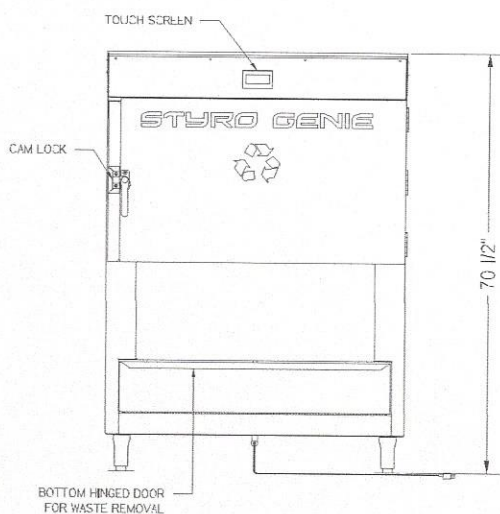
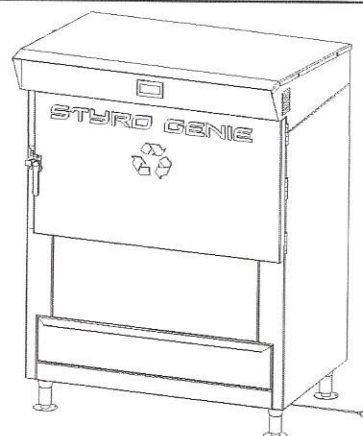
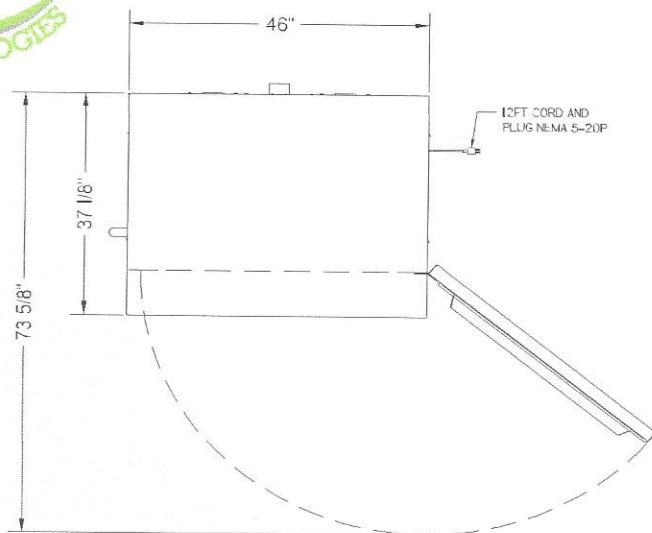
info@styrosmart.com
www.styrosmart.com

Attachment 7.3
Proudly Made in the USA



StyroGenie Tech Sheet

Protecting The Earth Today For A Better Tomorrow



Electrical:

- 120v, 18.8 amps.
- Unit provided with 8 foot cord and NEMA 5-20 plug.
- GFIC connection not recommended.

Warranty:

- Includes One-year parts and labor warranty.
- Optional Extended Warranty also available.

Options:

- **FoodGenie FG-200** a food waste compost accelerator providing on site reduction of food waste volume up to 90% - creating compost that can be reused as nutrient rich mulch. Making it 100% recyclable.
- Casters in Lieu of legs
- Power Vent with Odor Neutralizer
- Sorting table for collection and separation
- Tap & Stack Cart
- Start-up and Training

Western Recycling Technologies
612 East Aspen Way
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www.styrosmart.com

Innovative Solutions for a

Your Zero Waste Solution

Attachment 7.3



*Protecting The Earth Today
For A Better Tomorrow*

Designed restaurants, fast food franchises, supermarkets and food preparation facilities in schools and cafeterias. StyroSmart offers a number of sizes that can accommodate small to large scale facilities.

Features & Benefits:

Proprietary Heating design with significantly lower energy consumption.

Easy unloading

- Power activated discharge door
- Storage Shelf that holds collection pan. Other units on the market require the operator to hold pan or place on the floor while machine unloads.

Access Control

The FG-Series includes LED touch screen interface with 4 digit password protection and automatic locking load and discharge doors to safety prevent unauthorized access and operation.

Construction: The FG-Series is constructed with heavy duty 1-1/2" stainless steel tube frame for long lasting strength and rigidity. Interior chamber is constructed with 12 gauge type 304 stainless steel. Exterior is constructed with 16 gauge 304 #4 polished stainless steel.

Operation: FG-Series is a automated on-site compost accelerator system that dehydrates compostable waste using an energy-efficient automated control process. The system requires no enzymes, additives or fresh water during the dehydration process. The system rapidly converts food waste into a nutrient rich compost material suitable for re-use in landscaping and agricultural applications. Complete reduction of food waste in 12-24 hours.

FoodGenie Tech Sheet

FoodGenie FG-Series is a food waste compost accelerator providing on site reduction of food waste volume up to 90% - creating compost that can be reused as nutrient rich mulch. Making it 100% recyclable.



Lift and load
angled top

LED Touch Screen interface with 4
digit password protection prevents
unauthorized operation.



Easy Waste
Removal

Your Zero Waste Solution

801.300.7246

As Manufactured By

StyroSmart
Solutions
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www.styrosmart.com

Attachment 7.3



FoodGenie Tech Sheet

Protecting The Earth Today For A Better Tomorrow



Innovative Solutions for a

Your Zero Waste Solution

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As Manufactured By

StyroSmart Solutions

info@styrosmart.com

Model	Capacity		Dimensions			Power		
	lbs/day	t/mth	Length	Width	Height	Volts	Phase	Amps
FG-220	220	3.0	46.375"	34.375"	43.25"	220 v	1 Ph	18.6
FG-440	440	6.1	81.375"	34.375"	43.25"	220 v	1 Ph	28.6
FG-660	660	9.1	116.375"	34.375"	43.25"	220 v	1 Ph	37.2
FG-880	880	12.2	151.375"	34.375"	43.25"	220 v	1 Ph	37.2
FG-1100	1100	15.2	151.375"	72.375"	43.25"	220 v	3 Ph	46.9

Electrical:

- Direct wire to disconnect.

Warranty:

- Includes one-year parts and labor warranty.
- Optional Extended Warranty also

Options:

- **StyroGenie SG-1200** recycling Styro-foam, reducing waste volume by 95% and offering a 100% recycling solution.
- Waste Collection Center for separation and sorting of food waste.

Attachment 7.3

L & R Capital, Inc

Western Recycling Technologies, Inc

Protecting the earth today for a better tomorrow



Equipment Proposal

Date: 07/23/2014

Proposal # 113
Model: StyroGenie SG-1200

Prepared for:
Lowell School District
Attn: Billy Reid

Western Recycling Technologies, Inc
612 E. Aspen Way, Centerville Ut. 84014
Tel: 801-300-7246 ~ Fax: 760-453-7219 ~ e-mail: RobertC@wrtnow.com

web ~ www.wrtnow.com

Model: StyroGenie SG-1200

STANDARD EQUIPMENT FEATURES

The StyroGenie source reduction machine is capable of melting up to 1200 Styrofoam lunch trays within a 6 to 8 hour time period. Through conductive heat the StyroGenie will melt the lunch trays into plastic blocks thus reducing the volume of Styrofoam waste collection by 95%.

The machine is loaded through the Front Facing/Forward Opening Single Door and is capable of accepting up to 1200 trays per load.

Construction

- ✦ 16 Gauge Type 304 #4 Polished Stainless Steel thru-out insures long service life
- ✦ Heavy 11 Gauge Stainless Steel Internal Frame
- ✦ Ergonomic Front Loading Door
- ✦ Single key switch designed for ease of operation
- ✦ Casters or Adjustable legs with Seismic Anchors
- ✦ Operates on less than 1800 watts
- ✦ 46"W X 37"D X 70.5"H



Safety

- ✦ Listed and Labeled to UL 499
- ✦ Meets CE standards for safety
- ✦ Electric locks prevent unauthorized entry
- ✦ Timed Cycle for Automatic Shut Down
- ✦ LED safety warning lights
- ✦ Safe to Open indicators
- ✦ Meets NEC code 427.23 Grounded Heater

Electrical

- ✦ 120 Volts, 12ft Cord Direct Wire Disconnect
- ✦ Rugged Heating elements
- ✦ 3-wire with ground
- ✦ Keyed Control Panel



Model: StyroGenie SG-1200

EQUIPMENT COST & DELIVERY

MACHINE PRICE

Western Recycling System Model StyroGenie SG-1200 Source Reduction Machine.....

1 -	StyroGenie SG-1200	\$14,283.00
1 -	Food Genie FG-22-	\$21,878.00
1 -	Sorting Table (stainless)	\$ 1,465.00
1 -	Tray Stacker	\$ 450.00
2 -	Shipping	\$ 1,142.00
TOTAL		\$39,218.00

The above pricing is based on the purchase of one StyroGenie Machine. We do offer discount pricing for purchases of ten or more units at the same time.

The StyroGenie SG-1200 will accept all #6 Polystyrene materials both clean and contaminated. The food service items do not need to be cleaned prior to reduction.

The machine quoted is based on testing and specifications we have at this time. Please forward any questions and or additional specifications that may be needed to meet or exceed your County School requirements.

PRICES QUOTED ARE FOR 90 DAYS – AFTER WHICH ARE SUBJECT TO CHANGE

DELIVERY

4 to 6 weeks after receipt of both the purchase order and initial down payment

Note: These times may be shortened at time of purchase depending on scheduling availability.

TERMS

50% Down payment with purchase order

50% Due upon installation.

INSTALLATION & WARRANTY

STARTUP ASSISTANCE

Startup assistance is all inclusive of machine cost with exception of electrical supply. An additional charge of \$150.00 per hour for adding electrical supply for customer will be billed separately if needed. Customer is solely responsible and must ensure that all designated personnel are present for training during installation. Additional cost for rescheduling technician for an additional training visit will be billed at \$112.50 per hour. Customer is billed for travel time from our Portland, OR plant to their facility and time spent at facility. Customer will also be billed for all trip expenses including transportation charges, lodging charges, and meals if applicable. Our payment terms for training and service are net 10 days from completion date.

WARRANTY

1. Buyer's exclusive remedies under this Agreement are limited to (1) repair or replacement of defective material or poor workmanship, or, (2) return of equipment by buyer and refund of monies paid by buyer. If after reasonable opportunity to cure by seller, equipment is not performing in accordance with seller's specifications as indicated in the attached formal proposal. The forgoing exclusive remedies extend for a period of 365 days following installation, providing that the machine is maintained and used in accordance with seller's recommendations. Buyer's remedies may be nullified by modifications made to the machine which have not been approved in writing by Western recycling Technologies. Buyer's entitlement to these remedies is conditional upon buyer having paid to seller the machine price in full.
2. There are no warranties which extend beyond the description on the face hereof. Seller shall have no liability to buyer or any other party for incidental or consequential damages resulting from material or workmanship.
3. Commercial Dispute: Applicable Law, Jurisdiction and Venue. The parties agree that this Agreement, regardless of order of signing, shall be deemed to have been entered into Salt Lake City, Utah, wherein the subject source reduction machinery has been or will be manufactured and that this Agreement shall be construed and enforced pursuant to the laws of the State of Utah, in the event a commercial dispute arises from or incident to this Agreement.
4. Service Contract over rides all warranty. \$100.00 per month covers all Equipment, Training, Service, Tech Support, and By-Product pick up on a 30 to 50 block basis (all parts optional).



Orwak 9020

Benefits

- Savings on your waste collection
- Tidy premises
- Space saving
- Ability to segregate waste

Features

- Top loading
- Easy to use
- High performance
- Innovative design, technically superior
- Multi chambers; expandable (2-6 bins)



Technical specifications

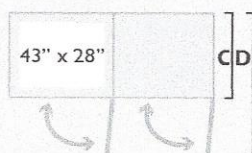
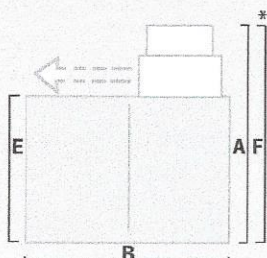
Dimensions

9020

A: 8'1"
B: 98"
C: 38" (45")
D: 86"
E: 55"
F: 6'3"

*Transport Height, must be ordered

† Including strap holders



Loading aperture

Width: 43"
Depth: 28"

Cycle time 35 sec.

RAM force

44,000 lbs (38 p.s.i)

Bale size

Width: 43"
Depth: 28"
Height: 31"

Bale weight

Cardboard: Up to 440 lbs
Plastic: Up to 660 lbs

Chamber dimension (internal)

Width: 43"
Depth: 28"
Height: 44"

Weight (machine)

Total: 3,480 lbs
Only chamber: 2,434 lbs
Only press unit: 1,057 lbs

Noise level < 70 db (A)

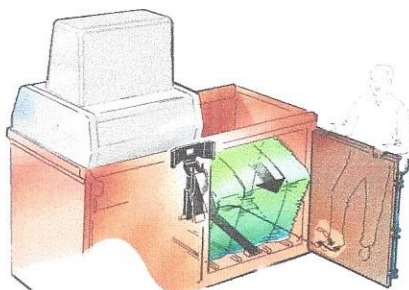
Protection class IP 55

Operating power

208 V/3/60, 460 V/3/60 20 A

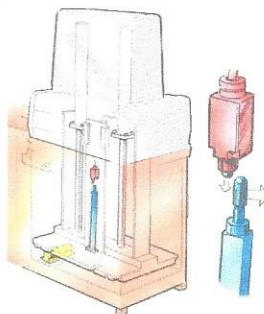
A top loading, strong partner

Orwak 9020 is our real heavy weight! It offers an extendible system for companies with large amounts of packaging materials, recyclables etc. The baler generates bales that weigh up to 660 lbs (plastic). The 9020 is simple and easily expandable with extra bins. The press head is extremely easily manoeuvred sideways over the correct chamber.



Automatic uneven load protection

The patented Orwak design feature prevents accidents and break-down due to uneven loading caused by the wrong materials being placed in the chamber.



The press force can be regulated for each chamber according to the material.



Once installed, expandable with additional bins. Use up to 6 top-loading bins for all your recyclables

For more info. contact us or visit our website www.orwak.us
We reserve the right to make changes to specifications without prior notice.
Bale/bag/bin weights are dependent upon material type.

Western Recycling Technologies

Western Recycling Technologies

612 E. Aspen way
Centerville, UT 84014
801-300-7246

(801)300-7246
robertc@wrtnow.com
<http://www.wrtnow.com>

Estimate

Date	Estimate No.
10/15/2014	1013
	Exp. Date

protecting the earth today for a better tomorrow

Address

Mr. Billy Reid
Lowell School District
65 South Pioneer Street
Lowell, Oregon 97452 USA

Sales Rep

Robert

[illegible]

Accepted By

Accepted Date

Food Service Projected 2014-15 Budget

FOOD SERVICE FUND RESOURCES

		<u>Budgeted</u>	<u>Projected</u>
1610	Food Sales	10,000.00	14,437.00
3199	Other State Reimbursement	1,000.00	4,200.00
4505	National Nutrition Reimbursement	125,000.00	195,630.00
4900	Commodities	10,000.00	13,550.00
5200	Transfers	11,539.00	3,370.00
5400	Beginning Fund Balance	<u>5,000.00</u>	<u>8,000.00</u>
TOTAL RESOURCES:		162,539.00	239,187.00

FOOD SERVICE FUND REQUIREMENTS

		<u>Budgeted</u>	<u>Projected</u>
3100			
112	Classified Salaries	35,023.00	41,406.09
114	Managerial Salaries	18,000.00	31,820.25
211	PERS	10,772.00	12,189.47
212	PERS Pick-up	3,181.00	3,594.59
220	FICA	4,056.00	5,635.39
231	Workers Comp	1,157.00	1,371.07
241/242	Health Insurance Benefits	12,350.00	23,274.85
322	Repairs and Maintenance	-	4,000.00
340	Travel	-	8,000.00
389	Professional Services	3,000.00	1,700.00
410	Supplies	1,000.00	1,000.00
450	Food	70,000.00	70,000.00
460	Non-consumable Items (loan purchases)	-	27,000.00
470	Software	1,500.00	1,500.00
640	Dues and Fees	<u>2,500.00</u>	<u>3,500.00</u>
TOTAL REQUIREMENTS:			235,991.71
			3,195.29 ENDING FUND BALANCE

LOWELL SCHOOL DISTRICT #71

JOB DESCRIPTION

Title:	Supervisor of Custodian/Painting Services	Reports To:	Superintendent
Salary:	TBD	Classification:	Classified Management
FLSA:	Exempt (Salaried)	Work Year:	12 Months
Board Ratified:	October 27, 2014		

BASIC FUNCTION:

The Supervisor of Custodian/Painting Services reports to the Superintendent or designee and keeps assigned buildings and associated areas clean and orderly.

REPRESENTATIVE MANAGEMENT DUTIES:

- Organizes, directs, monitors, evaluates and provides training for the work of School Custodians and Student Helpers, and Painting Staff.
- Develops and implements work schedules; identifies and prioritizes specific tasks to be accomplished
- Performs, plans and directs cleaning and minor maintenance work of District custodial staff
- Provides leadership and works with the custodial staff in carrying out custodial and maintenance tasks in all District facilities
- Provides leadership and works with the assigned painting staff
- Directs and assists in moving, arranging and setting up furniture and equipment for special events, meetings, and athletic events
- Orders and maintains inventory of appropriate supplies and equipment for all custodial and painting staff
- Follows general safety and hazardous materials procedures
- Monitors both day and evening custodians
- Makes routine security checks reporting vandalism and arranging for or performing needed repairs
- Does related work as required

CUSTODIAL DUTIES INCLUDE:

- Sweeping, scrubbing, waxing and polishing concrete, linoleum, tile, and wood floors
- Vacuuming and shampooing rugs and carpets
- Cleaning and dusting walls, furniture, woodwork and other equipment
- Washing, scrubbing, and disinfecting rest rooms
- Performing minor repairs to buildings and fixtures; replacing light bulbs as necessary
- Maintaining equipment used in the course of work
- Correcting or reporting safety, sanitary and fire hazards
- Opening and/or closing the buildings, including lights, heating, air conditioning, security, and raising and lowering flag
- Monitoring the evening building schedule and allowing access to appropriate areas of the building; securing building after evening use
- Locking down the building in the event of an emergency (during school hours)
- Setting up, taking down, and arranging chairs, tables and related equipment for evening activities
- Temporarily performing duties of the other district custodians in the event of an emergency or absence
- Directing visitors and safeguarding school property
- Maintaining regular and consistent attendance and punctuality
- Performing related duties consistent with job description and assignment

PHYSICAL REQUIREMENTS:

- Light Repetitive Work:
- Floor level: occasionally; scraping gum, pulling staples
- Knee level: occasionally; cleaning desks
- Waist level: continuously cleaning desks, vacuuming
- Shoulder level: frequently; cleaning shelves, gathering supplies
- Overhead level: frequently; changing light bulbs, dusting, washing windows
- Bending: frequently; toilet bowls, tables
- Twisting: frequently; mopping, vacuuming, operating floor machine, waxing floors, shampooing carpet
- Squatting: picking up items from the floor
- Kneeling/crawling and working in awkward positions

KNOWLEDGE AND ABILITIES:

Knowledge and Application of: General methods of maintenance and cleaning procedures, use of cleaning materials and plumbing skills required for routine maintenance; danger of hazardous materials; lead based painting precautions, asbestos removal processes and precautions, pesticide and insecticide use and the appropriate action to prevent injury to self and others

Ability to:

- Use equipment common to the custodial, grounds keeping and maintenance function
- Work independently to complete tasks
- Develop and follow schedules
- Understand, implement, and give oral and written directions in English
- Organize, evaluate, schedule, monitor and direct the work of others
- Communicate effectively and maintain cooperative relationships fellow staff member and parents
- Follow general safety and hazardous materials procedures

EDUCATION AND EXPERIENCE:

Education: High School Diploma or equivalent

Experience: At least three (3) years of experience in performing custodial, grounds keeping and maintenance functions, preferably in a school setting, and experience in directing the work of others

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to stand, walk, climb ladders, use hands to finger, handle, or feel objects, tools, or controls and reach with hands and arms. The employee frequently is required to stoop, kneel, crouch, or crawl and talk or hear. The employee is occasionally required to sit, climb or balance, and taste or smell.

The employee must regularly lift and/or move up to 50 pounds and frequently lift and/or move up to 100 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee occasionally works near moving mechanical parts and in high, precarious places and is occasionally exposed to fumes or airborne particles, toxic or caustic chemicals, risk of electrical shock, and vibration.

The noise level in the work environment is usually loud.

**Memorandum of Understanding
Between Lowell School District and Lowell Chapter #118 Oregon School Employees
Association**

WHEREAS the Lowell School District No. 71 (District) and Lowell Chapter #118 Oregon School Employees Association (Association) together are seeking to develop each staff member to their fullest potential that will best serve the District:

Whereas the District and the Association have a mutual interest in providing career opportunities for the members of the Association;

Whereas the District and the Association recognize that small school districts of necessity have management employees who must of necessity perform the work of the Association (e.g. Director of Transportation driving a bus or Supervisor of Maintenance and Operations performing maintenance work);

Whereas the District and the Association recognize the Associations need to protect bargaining unit work by agreeing to trial management service with some bargaining unit work as a non precedent setting practice.

Whereas the District and the Association recognize the uniqueness of the two present classified management positions that do perform a percentage of work that could be construed to be bargaining unit work (Director of Technology/Coordinator of Food Service and Director of Transportation, and Supervisor of Maintenance and Operations);

Whereas the District and the Association recognize that the District has added 10 additional daily hours of custodial and maintenance bargaining unit hours;

Whereas the District and the Association recognize that the present Lead Custodian, Mr. Ben Silebi, has the potential to become the Director of Maintenance, Operations and Transportation and that the District is investing time and funding to assist in his development;

Whereas the District and the Association recognize that Mr. Silebi presently assigns, directs and leads the work of the custodians;

NOW, THEREFORE, the District and the Association agree to the following:

1. That Mr. Silebi shall become a non represented management employee and continue to perform the work he is presently assigned (bargaining unit work), in addition to being primarily responsible for the selection, assignment and evaluation of employees under his supervision (Management work); and,
2. That Mr. Silebi shall remain in this capacity until either the present Director of Transportation or the Supervisor of Maintenance and Operations chooses to leave the District, at which time Mr. Silebi will either return to his Lead Custodian Role or take on the duties and responsibilities of the management employee who elected to leave the District or Mr. Silebi terminates his employment with the District.

3. That Mr. Silebi will be placed on the confidential professional salary/benefits schedule. Mr. Silebi will be exempt from overtime. Mr. Silebi will not be a dues paying member nor have access to Union Representation.

4. All parties agree this matter regarding the bargaining unit work and the management position will, unless renegotiated, sunset June 30, 2017



Walt L. Hanline, Superintendent

Date



Jef Jalof, Lowell OSEA President

Date

Mary Kay Brant, Field Representative

Date

TEACHER EVALUATION HANDBOOK

**LOWELL SCHOOL DISTRICT
2014-2015**

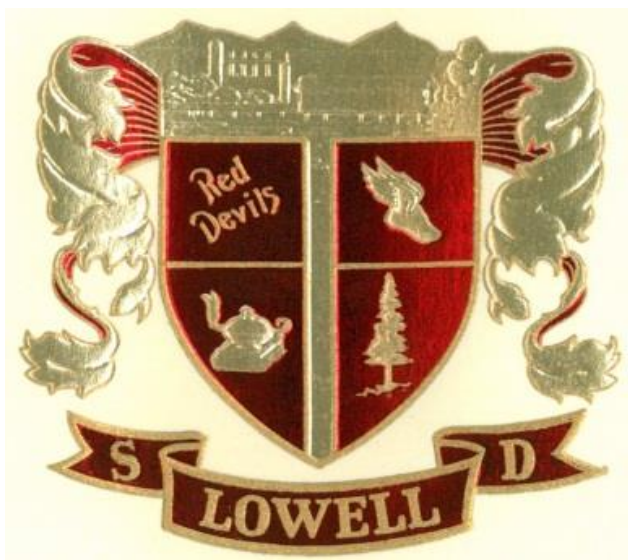


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Professional Practice Goal Evidence Divider

Professional Responsibility Goal Evidence Divider

PD/Evaluation Team		
	School	Assignment
Walt Hanline	District	Superintendent
Kay Graham	District	K-12 Principal
Amber Hansen	Lundy Elem	Special Education Coordinator, LEA Treasurer
Johnie Matthews	Lundy Elem	5/6 Grade Teacher, LEA President
Toni Taylor	Lowell High	Science Education Department

In compliance with SB290, Lowell School District had opened the invitation up to all certified staff members. A special thank you to the team above for volunteering countless hours to ensure the district has highly trained professional teachers.

PROFESSIONAL DEVELOPMENT ALIGNED WITH EVALUATION

As stated in Element 5 of the Oregon Framework for Teacher and Administrator Evaluation and Support Systems: “The focus of the evaluation system is on improving professional practice and student learning. To that end, linking evaluations with high quality professional learning is key (p35).”

Our evaluation and professional development (PD) plans are aligned ultimately through interpretation of a teacher’s placement on the Teacher Effectiveness Matrix. In this way PD needs are directly influenced by all the elements of the evaluation system. Our professional development cycle includes a teacher’s assessment of their PD needs and goals, finding appropriate PD opportunities to address those needs, application of the learning that occurred in the PD, interim review of PD’s effectiveness in meeting PD goal, and final review of PD outcomes. The cycle of PD mirrors the evaluation cycle.

The district will learn about teacher’s opinions of PD as it exists in practice in the Lowell School District. The PD subcommittee will have an open survey asking staff for input on PD. Questions will be designed to determine what kinds of PD teachers currently get, what they most value, barriers to PD, etc. Our goal is to find evaluation and PD goals that aligns with state and district requirements.

Lowell Comprehensive Teacher Evaluation System

Senate Bill 290 requires all districts in the State of Oregon to comply with the Oregon Framework for Teachers and Administrative Evaluation and Support Systems and follow the criteria below by the 2014-2015 school year. However, in order for Lowell to receive the ESEA Waiver (which releases us from NCLB for a year), we must develop and fully pilot a new evaluation system with the following criteria in the 2013-2014 school year. This waiver will allow Lowell to develop and create an evaluation system that fits with our philosophy of education and culture. The following criteria are required.

1. Standards of Professional Practice

The Model Core Teaching Standards were developed by Interstate Teacher Assessment and Support Consortium (InTASC). These standards are listed below in the four domains of teaching:

<u>Domain 1: The Learner and Learning</u> Standard #1: Learner Development Standard #2: Learning Differences Standard #3: Learning Environments	<u>Domain 3: Instructional Practice</u> Standard #6: Assessment Standard #7: Planning for Instruction Standard #8: Instructional Strategies
<u>Domain 2: Content Knowledge</u> Standard #4: Content Knowledge Standard #5: Application of Content	<u>Domain 4: Professional Responsibility</u> Standard #9: Professional Learning and Ethical Practice Standard #10: Leadership and Collaboration

***For further details visit <http://www.ccsso.org/Documents/2011/InTASC> .*

2. Differentiated (4) Performance Levels

H = Highly Effective, E = Effective, I = Improvement Necessary, D = Does Not Meet (The Lowell Teacher PD/Evaluation Subcommittee 2012-2013 adopted these descriptors.)

3. Multiple Measures

Data/Evidence is used to measure teacher and administrator performance in three categories: professional practice goal (PPG), professional responsibilities goal (PRG), and student learning goal (SLG).

4. Evaluation and Professional Growth Cycle

Administrators and teachers are evaluated on a regular cycle that includes self-reflection, goal setting, observations, formative assessment and summative evaluation.

5. Aligned Professional Learning

Professional learning and growth connect to the evaluation process for teachers and administrators and, in turn, direct professional development.

The Lowell PD/Evaluation Subcommittee has aligned our Lowell Comprehensive Teacher Evaluation System to all five criteria of the framework. However, you will need to complete the Multiple Measures component (see below). You will use the tools and documents in this evaluation binder to set goals and provide evidence of growth in three measures. **Each teacher will write two student learning goals (SLG), a professional practice goal (PPG), and a professional responsibility goal (PRG) annually on the Lowell Goals Sheet.** (Please see *Lowell Teacher Evaluation Timeline*.) The following will guide you in creating goals and collecting evidence.

Student Learning and Growth Goals (SLG)

Below are suggested steps in using the tools and documents in this evaluation binder.

1. Read the explanation below regarding the criteria for Student Learning Goals from the Oregon Framework for Teacher and Administrator Evaluation and Support Systems. We must follow these criteria.

***Student Learning and Growth:** Evidence of teachers' contribution to student learning and growth. Teachers will establish at least two student learning goals and identify strategies and measures that will be used to determine goal attainment (see table below). They also specify what evidence will be provided to document progress on each goal:*

a) Teachers who are responsible for student learning in tested subjects and grades (i.e. ELA and mathematics in grades 3-8, 11) will use state assessments as one measure (category 1) and will also select one or more additional measures from category 2 or 3 that provide additional evidence of students' growth and proficiency/mastery of the standards, and evidence of deeper learning and 21st century skills.

b) Teachers in non-tested (state test) subjects and grades will use measures that are valid representations of student learning standards from at least two of the following three categories, based on what is most appropriate for the curriculum and students they teach (pp. 22-23).

Category	Types of Measures (aligned to standards)	Examples include, but are not limited to:
1	State or national standardized tests	Oregon Assessment of Knowledge and Skills (OAKS), SMARTER Balanced (when adopted), English Language Proficiency Assessment (ELPA), Extended Assessments
2	Common national, international, regional, district-developed measures	ACT, PLAN, EXPLORE, AP, IB, DIBELS, C-PAS, other national measures; or common assessments approved by the district or state as valid, reliable and able to be scored comparably across schools or classrooms
3	Classroom-based or school-wide measures	Student performances, portfolios, products, projects, work samples, tests

2. Assess your students.
3. If needed, use the following tools to help you write a SMART (Specific, Measurable, Appropriate, Realistic and Time-bound) goal: Guide for Developing SMART Goals document, Student Learning Goals Process Article, Step-By-Step SMART Goal Process document, and Sample SMART Goals for Student Growth document.
4. Complete SLGs on the Lowell Goals Sheet.
5. Meet with your administrator/evaluator to review your SLGs.

6. Assess and collect evidence supporting the SLGs (All evidence will be maintained in your evaluation binder.)
7. Meet mid-year with your administrator/evaluator and make adjustments as necessary to meet your four goals.
8. Continue assessing and collecting evidence supporting the goals.
9. Meet with administrator/evaluator for summative review. Follow the guidelines on the matrix.

Professional Practice Goal (PPG)

Below are suggested steps in using the tools and documents in this evaluation binder.

1. Review domains A, B, C, and D on the Marshall Rubric (adopted from Kim Marshall). Self-assess in all 10 categories in the four domains by circling the appropriate level (Highly Effective, Effective, Improvement Necessary, Does Not Meet) on the Teacher Evaluation Rubric in this document.
2. Meet with the administrator and review scores on self-assessment.
3. If the teacher and administrator disagree on the scores, then they discuss and collaboratively resolve this. Possible next steps are: use the rubric as a framework (for example, explicitly define the words in the rubric) and/or the teacher can support his/her position by providing additional evidence.
4. Collaborate with your evaluator to write your SMART goal on the Lowell Goals Sheet on the second page of the Lowell Goals Sheet.
5. Teacher and administrator also need to agree on the evidence that will be used to reach these goals. The evidence must include multiple measures.
6. Assess and collect evidence supporting the PPG throughout the year.
7. Meet mid-year with your administrator/evaluator and make adjustments as necessary to meet your four goals.
8. Continue assessing and collecting evidence supporting the goals.
9. Meet with administrator/evaluator for summative review. Follow the guidelines on the matrix.

Professional Responsibility Goal (PRG)

Below are suggested steps in using the tools and documents in this evaluation binder.

1. Review domain E and F on the Marshall Rubric. Self-assess in all 10 categories in the two domains by circling the appropriate level (Highly Effective, Effective, Improvement Necessary, Does not Meet) on the Teacher Evaluation Rubric in this document.
2. Meet with the administrator and review scores on self-assessment.
3. If the teacher and administrator disagree on the scores, then they discuss and collaboratively resolve this. Possible next steps are: use the rubric as a framework (for example, explicitly define the words in the rubric) and/or the teacher can support his/her position by providing additional evidence.
4. Collaborate with your evaluator to write your SMART goal on the second page of the Lowell Goals Sheet.
5. Teacher and administrator also need to agree on the evidence that will be used to reach these goals. The evidence must include multiple measures.
6. Assess and collect evidence supporting the PRG throughout the year.
7. Meet mid-year with your administrator/evaluator and make adjustments as necessary to meet your four goals.
8. Continue assessing and collecting evidence supporting the goals.
9. Meet with administrator/evaluator for summative review. Follow the guidelines on the matrix.

Lowell Teacher Evaluation Timeline

August-September: Review SLGs

- Evaluators will calendar meeting dates for initial conference, mid-course review, and summative review.
- Teacher completes self-evaluation using Teacher Evaluation Rubric to review with administrator at initial conference.

September-October: Initial Conference

- Use the SMART goal process to choose 2 Student Learning Goals (SLG).
- Review teacher self-evaluation – identify areas of focus for the Professional Practice Goal (PPG) from the domains (A-D) specifying the criteria (a-j) which will align and support your 2 chosen SLGs.
- Identify Professional Responsibility Goal (PRG) from domains (E or F) and identify specific criteria (a-j).
- Meet with evaluator to review these four goals between Oct.15-31. Submit Lowell Goal Sheet (SLG, PPG and PRG) at this meeting. Creating the goals as a collaborative process between the teacher and evaluator.

September-May: Ongoing

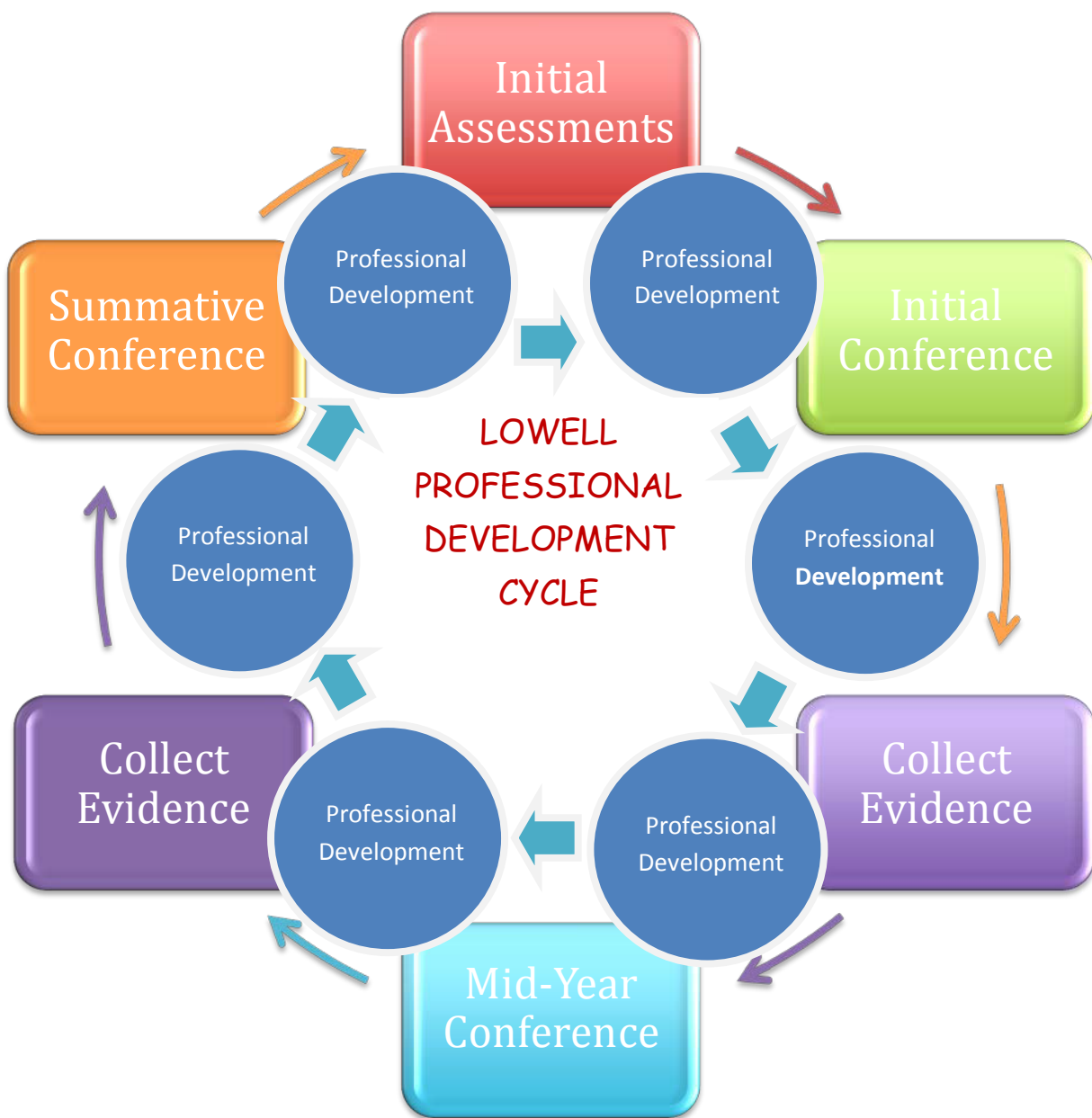
- Evaluator will make a minimum of 5 unscheduled 5 minute minimum observations in teacher classrooms. Feedback, using a mutually agreed upon rubric, will be given in written form or electronically within 24 hours. Ideally, the feedback will be on the identified goals, however, feedback may include any elements of the rubric.
- If the evaluator determines there are areas of “improvement necessary” or “does not meet standards” the evaluator and the teacher will meet face to face within 3 working days to discuss strategies for improvement.
- Evaluators may conduct longer observations when they or the teacher deem necessary.

January-February: Mid-Year Review

- Conduct mid-year review with evaluator of SLG/PPG/PRG, re-set direction based on review, data, information and feedback.
- If by mid-year the evaluator has not observed any evidence of the identified goals the teacher and evaluator will meet to discuss how to insure the observation of the identified goals.

May-June: Summative Review

- By May 1, the teacher will submit a written reflection of SLG/PPG/PRG and collection of evidence.
- By the last day of the school year, the evaluator will meet with the teacher and complete the Lowell Goal Sheet.
- At any time a teacher can request a meeting with their evaluator to discuss any feedback.
- At any time a teacher may invite support personnel to attend meetings with the teacher and their evaluator (i.e.: mentor teacher, union representative, etc.).
- Teacher and evaluator can agree to modify the timeline if needed.



LOWELL GOALS SHEET

Teacher:		Assignment:		Date:	
Administrator:		School:			

Initial Conference	Content for first Student Learning Goal (SLG1)			
	<ul style="list-style-type: none"> The goal is being written around which grade/subject/level? Define the timeframe. 			
	Baseline Data for SLG1			
	<ul style="list-style-type: none"> What are the learning needs of my students? Attach supporting data/ pre-assessment. 			
	Write your SLG1			
	<ul style="list-style-type: none"> Check that goal meets the SMART criteria. 			
	Types of Measures for SLG1		Category 1: State or National Standardized Test: _____ Category 2: Common national, international, regional, district-developed measures: _____ Category 3: Classroom-based or school-wide measures: _____	
	<ul style="list-style-type: none"> Category 1 is mandatory for one goal if available. You must use a second measure of assessment if data is not available by June. Categories 2 & 3: Multiple measures of assessment are not required. Check all that apply & specify. 			
	Strategies for Improvement of SLG1			
	<ul style="list-style-type: none"> How will I help students attain this goal? Provide specific actions that will lead to goal attainment. 			
	Define HEID for SLG1			
	Fill in the blank row with concrete numbers to delineate between the levels for summative assessment.			
	Highly Effective: <i>Exceptional number of students achieve goal</i>	Effective: <i>Significant number of students achieve goal</i>	Improvement Necessary: <i>Less than significant number of students achieve goal</i>	Does Not Meet: <i>Few students achieve goal</i>
Content for second Student Learning Goal (SLG2)				
<ul style="list-style-type: none"> The goal is being written around which grade/subject/level? Define the timeframe. 				
Baseline Data for SLG2				
<ul style="list-style-type: none"> What are the learning needs of my students? Attach supporting data/ pre-assessment. 				
Write your SLG2				
<ul style="list-style-type: none"> Check that goal meets the SMART criteria 				
Types of Measures for SLG2		Category 1: State or National Standardized Test: _____ Category 2: Common national, international, regional, district-developed measures: _____ Category 3: Classroom-based or school-wide measures: _____		
<ul style="list-style-type: none"> Category 1 is mandatory for one goal if available. You must use another measure of assessment if data is not available by June. If you have already used Category 1 in SLG1, you must choose from Categories 2 & 3. Within Categories 2 & 3, multiple measures of assessment are not required. Check all that apply & specify. 				
Strategies for Improvement of SLG2				
<ul style="list-style-type: none"> How will I help students attain this goal? Provide specific actions that will lead to goal attainment. 				
Define HEID for SLG2				
Fill in the blank row with concrete numbers to delineate between the levels for summative assessment.				
Highly Effective: <i>Exceptional number of students achieve goal</i>	Effective: <i>Significant number of students achieve goal</i>	Improvement Necessary: <i>Less than significant number of students achieve goal</i>	Does Not Meet: <i>Few students achieve goal</i>	

Initial Conference	Write your Professional Practice Goal (PPG) from Marshall's domains A,B,C or D			
	Types of Measures for PPG <ul style="list-style-type: none"> Multiple measures are required. Check all that apply & specify. 		Category 1: Administrator observation Category 2: Classroom artifacts (teacher or student produced), lesson plans, curriculum design, etc. _____	
	Write your Professional Responsibility Goal (PRG) from Marshall's domains E or F			
	Types of Measures for PRG <ul style="list-style-type: none"> Multiple measures are required. Circle all that apply & add if necessary. 		Teacher reflections, self-reports, data analysis, records of participation in meetings or committees, peer collaboration &/or observation, administrator observation, parent/ student surveys, portfolios, committee work, building level leadership, etc.	
	Teacher Signature:	Date:	Administrator Signature:	Date:

Mid-Year Review	Collaborative Mid-Course Data Review of SLGs, PPG & PRG			
	<ul style="list-style-type: none"> What progress has been made? Are you collecting evidence? 			
	Strategy Modification <ul style="list-style-type: none"> What adjustments need to be made to my strategies? 			
	Teacher Signature:	Date:	Administrator Signature:	Date:

Summative Review	End-of-Year Data of SLGs, PPG & PRG					
	<ul style="list-style-type: none"> What does the end of the year data show? Attach supporting data. 					
	Reflection on Results					
	<ul style="list-style-type: none"> Overall, what worked or what should be refined? 					
	Effectiveness of SLG1		H	E	I	D
	Effectiveness of SLG2		H	E	I	D
	Effectiveness of Domain 1: Planning & Preparation for Learning		H	E	I	D
	Effectiveness of Domain 2: Classroom Management		H	E	I	D
	Effectiveness of Domain 3: Delivery of Instruction		H	E	I	D
	Effectiveness of Domain 4: Monitoring, Assessment, & Follow-Up		H	E	I	D
	Effectiveness of Domain 5: Family and Community Outreach		H	E	I	D
	Effectiveness of Domain 6: Professional Responsibilities		H	E	I	D
Professional Growth Plan Implications <ul style="list-style-type: none"> How can I use these results to support my professional growth? Comment on any mitigating circumstances. 						
Teacher Signature:		Date:	Administrator Signature:		Date:	

Calculating Summative Teacher Evaluation

To adhere to new state laws, we must submit aggregate scores of teachers in the district. To do this, transpose the HEID from each goal into numbers, average the scores then use the matrix at the bottom of the page to determine the final summative score for each Teacher.

Domain	Score
Effectiveness of Domain 1: Planning and Preparation for Learning	
Effectiveness of Domain 2: Classroom Management	
Effectiveness of Domain 3: Delivery of Instruction	
Effectiveness of Domain 4: Monitoring, Assessment, & Follow-Up	
Effectiveness of Domain 5: Family and Community Outreach	
Effectiveness of Domain 6: Professional Responsibilities	
Average Score:	

Highly Effective	4
Effective	3
Improvement Necessary	2
Does Not Meet Standard	1

Top 2 SLG Outcomes	Score
SLG 1	
SLG 2	
Average Score:	

**The following addresses OR 344.815 and is for use with contract teachers only.*

Circle the Average Score for the Professional Practice and Responsibilities on the Y axis and the average score for the Student Learning Goals on the X-axis. The point where they meet is the final summative score as well as the evaluation plan for the following year(s).

In place of matrix, the following will be used for probationary teachers.

In the Summative Review:

a) areas of concern

b) acceptable progress towards area of concern

Professional Practice and Responsibility Average	4	ANNUAL PROFESSIONAL GROWTH GOALS BASED ON STUDENT GROWTH GOALS & RUBRIC: One PPG and PRG must focus on improving Student Goals' outcomes.	ANNUAL PROFESSIONAL GROWTH GOALS: Teacher has total autonomy to guide their own professional growth plan.	
	3	3	4	
	2	ANNUAL COLLABORATIVE PROFESSIONAL GROWTH GOALS BASED ON STUDENT GROWTH GOALS & RUBRIC: Educator will annually meet with Supervisor/ Evaluator and collaboratively develop PPG and PRG based on improving SLG outcomes and targeted growth areas.	ANNUAL COLLABORATIVE PROFESSIONAL GROWTH GOALS: Educator will annually meet with Supervisor/ Evaluator and collaboratively develop PPG and PRG based on improving targeted growth areas.	
	1	PLAN OF ASSISTANCE: Supervisor/Evaluator will immediately develop a Plan of Assistance based on improving outcomes <u>and</u> targeted growth of PPG, PRG, and SLG.	PLAN OF AWARENESS: Supervisor/Evaluator will annually develop PPG and PRG based on improving targeted growth areas; monthly check-in required.	
		1	2	
		1	2	3
		3	4	
		Student Learning Goals Average		

Teacher Evaluation Rubrics

Adopted from Kim Marshall – Revised January 31, 2013

Rationale and suggestions for implementation

1. These rubrics are organized around six domains covering all aspects of a teacher's job performance:
 1. Planning and Preparation for Learning
 2. Classroom Management
 3. Delivery of Instruction
 4. Monitoring, Assessment, and Follow-Up
 5. Family and Community Outreach
 6. Professional Responsibilities

The rubrics use a four-level rating scale with the following labels:

- 4 – Highly Effective
- 3 – Effective
- 2 – Improvement Necessary
- 1 – Does Not Meet Standards

2. The rubrics are designed to give teachers an end-of-the-year assessment of where they stand in all performance areas – and detailed guidance on how to improve. They are not checklists for classroom visits. To knowledgeably fill out the rubrics, supervisors need to have been in classrooms frequently throughout the year. It is irresponsible to fill out the rubrics based on one classroom observation. Unannounced mini-observations approximately once a month followed by face-to-face conversations are the best way for supervisors to have an accurate sense of teachers' performance, give ongoing praise and suggestions, and listen to concerns. For a detailed account of the development of these rubrics and their broader purpose, see Kim Marshall's book, *Rethinking Teacher Supervision and Evaluation* (Jossey-Bass, 2009).
3. The *Effective* level describes solid, expected professional performance; teachers should feel good about scoring at this level. The *Highly Effective* level is reserved for truly outstanding teaching that meets very demanding criteria. *Improvement Necessary* indicates that performance has real deficiencies; no teacher should be content to remain at this level (although some novices might begin here). Performance at the *Does Not Meet Standards* level is clearly unacceptable should lead to dismissal if it is not improved immediately.
4. When scoring, take each of the ten criteria, read across the four levels (Highly Effective, Effective, Improvement Necessary, and Does Not Meet Standards), find the level that best describes the teacher's performance, and circle or highlight that cell. This creates a clear graphic display of areas for commendation and areas that need work. Then give an overall score for that domain at the bottom of the page (averaging the scores on the page) and make brief comments in the space provided. When all six pages have been scored, record the ratings on the summary sheet (page 8).
5. Evaluation conferences are greatly enhanced if the supervisor and teacher fill out the rubrics in advance, then meet and compare scores one page at a time. The supervisor has the final say, of course, but the discussion should aim for consensus based on actual evidence of the more accurate score for each criterion. Supervisors should go into the evaluation process with humility since they can't know everything about a teacher's instructional activities, collegial interactions, parent outreach, and professional growth. Similarly, teachers should be open to feedback from someone with an outside perspective. For a discussion of the role of student achievement in teacher evaluation, see "Merit Pay or Team Accountability" (Education Week, Sept. 1, 2010) by Kim Marshall.
6. Some supervisors sugar-coat criticism and give inflated scores to keep the peace and avoid hurting feelings. This does not help teachers improve. The kindest thing a supervisor can do for an underperforming teacher is give candid, evidence-based feedback, listen to the teacher's concerns, and provide robust follow-up support.
7. If an entire staff is scored honestly using these rubrics, it's possible to create a color-coded spreadsheet that can serve as a powerful (confidential) road-map for school-wide professional development (see the sample on page 9).
8. These rubrics are "open source" and may be used and adapted by schools and districts as they see fit.

**Note: For each of the six rubrics below, the overall rating is a global interpretation and does not reflect a calculation of each category.*

1. Planning and Preparation for Learning

The teacher:	4	3	2	1
	Highly Effective	Effective	Improvement Necessary	Does Not Meet Standards
a. Knowledge	Is expert in the subject area and up to date on authoritative research on child development and how students learn.	Knows the subject matter well and has a good grasp of child development and how students learn.	Is somewhat familiar with the subject and has a few ideas of ways students develop and learn.	Has little familiarity with the subject matter and few ideas on how to teach it and how students learn.
b. Standards	Has a detailed plan for the year that is tightly aligned with high standards and ensures success on external assessments.	Plans the year so students will meet high standards and be ready for external assessments.	Has done some thinking about how to cover high standards and test requirements this year.	Plans lesson by lesson and has little familiarity with state standards and tests.
c. Units	Plans all units embedding big ideas, essential questions, knowledge, skill, and non-cognitive goals that cover all Bloom's levels.	Plans most units with big ideas, essential questions, knowledge, skill, and non-cognitive goals covering most of Bloom's levels.	Plans lessons with some thought to larger goals and objectives and higher order thinking skills.	Teaches on an <i>ad hoc</i> basis with little or no consideration for long-range curriculum goals.
d. Assessments	Prepares diagnostic, on the-spot, interim, and summative assessments to monitor student learning.	Plans on-the-spot and unit assessments to measure student learning.	Drafts unit tests as instruction proceeds.	Writes final tests short before they are given.
e. Anticipation	Anticipates students' misconceptions and confusions and develops multiple strategies to overcome them.	Anticipates misconceptions that students might have and plans to address them.	Has a hunch about one or two ways that students might become confused with the content.	Proceeds without considering misconceptions that students might have about the material.
f. Lessons	Designs each lesson with clear, measurable goals closely aligned with standards and unit outcomes.	Designs lessons focused on measurable outcomes aligned with unit goals.	Plans lessons with some consideration of long term goals.	Plans lessons aimed primarily at entertaining students or covering textbook chapters.
g. Engagement	Designs highly relevant lessons that will motivate all students and engage them in active learning.	Designs lessons that are relevant, motivating, and likely to engage most students.	Plans lessons that will catch some students' interest and perhaps get a discussion going.	Plans lessons with very little likelihood of motivating or involving students.
h. Materials	Designs lessons that use an effective mix of high quality, multicultural learning materials and technology.	Designs lessons that use an appropriate, multicultural mix of materials and technology.	Plans lessons that involve a mixture of good and mediocre learning materials.	Plans lessons that rely mainly on mediocre and low quality textbooks, workbooks, or worksheets.
i. Differentiation	Designs lessons that break down complex tasks and address all learning needs, styles, and interests.	Designs lessons that target several learning needs, styles, and interests.	Plans lessons with some thought as to how to accommodate special needs students.	Plans lessons with no differentiation.
j. Environment	Uses room arrangement, materials, and displays to maximize student learning of all material.	Organizes classroom furniture, materials, and displays to support unit and lesson goals.	Organizes furniture and materials to support the lesson, with only a few decorative displays.	Has a conventional furniture arrangement, hard-to access materials, and few wall displays.

Overall rating: _____

Comments: _____

2. Classroom Management

The teacher:	4	3	2	1
	Highly Effective	Effective	Improvement Necessary	Does Not Meet Standards
a. Expectations	Is direct, specific, consistent, and tenacious in communicating and enforcing very high expectations.	Clearly communicates and consistently enforces high standards for student behavior.	Announces and posts classroom rules and punishments.	Comes up with <i>ad hoc</i> rules and punishments as events
b. Relationships	Shows warmth, caring, respect, and fairness for all students and builds strong relationships.	Is fair and respectful toward students and builds positive relationships.	Is fair and respectful toward most students and builds positive relationships with some.	Is sometimes unfair and disrespectful to the class; plays favorites.
c. Respect	Wins all students' respect and creates a climate in which disruption of learning is unthinkable.	Wins almost all students' respect and refuses to tolerate disruption.	Wins the respect of some students but there are regular disruptions in the classroom.	Is not respected by students and the classroom is frequently chaotic and sometimes dangerous.
d. Social-emotional	Implements a program that successfully develops positive interactions and social-emotional skills.	Fosters positive interactions among students and teaches useful social skills.	Often lectures students on the need for good behavior, and makes an example of "bad" students.	Publicly berates "bad" students, blaming them for their poor behavior.
e. Routines	Successfully inculcates class routines up front so that students maintain them throughout the year.	Teaches routines and has students maintain them all year.	Tries to train students in class routines but many of the routines are not maintained.	Does not teach routines and is constantly nagging, threatening, and punishing students.
f. Responsibility	Gets all students to be self-disciplined, take responsibility for their actions, and have a strong sense of efficacy.	Develops students' self-discipline and teaches them to take responsibility for their own actions.	Tries to get students to be responsible for their actions, but many lack self-discipline.	Is unsuccessful in fostering self-discipline in students; they are dependent on the teacher to behave.
g. Repertoire	Has a highly effective discipline repertoire and can capture and hold students' attention any time.	Has a repertoire of discipline "moves" and can capture and maintain students' attention.	Has a limited disciplinary repertoire and some students are not paying attention.	Has few discipline skills and constantly struggles to get students' attention.
h. Efficiency	Skillfully uses coherence, momentum, and transitions so that every minute of classroom time produces learning.	Maximizes academic learning time through coherence, lesson momentum, and smooth transitions.	Sometimes loses teaching time due to lack of clarity, interruptions, and inefficient transitions.	Loses a great deal of instructional time because of confusion, interruptions, and ragged transitions.
i. Prevention	Is alert, poised, dynamic, and self-assured and nips virtually all discipline problems in the bud.	Has a confident, dynamic presence and nips most discipline problems in the bud.	Tries to prevent discipline problems but sometimes little things escalate into big problems.	Is unsuccessful at spotting and preventing discipline problems, and they frequently escalate.
j. Incentives	Gets students to buy into a highly effective system of incentives linked to intrinsic rewards.	Uses incentives wisely to encourage and reinforce student cooperation.	Uses extrinsic rewards in an attempt to get students to cooperate and comply.	Gives out extrinsic rewards (e.g., free time) without using them as a lever to improve behavior.

Overall rating: _____

Comments: _____

3. Delivery of Instruction

The teacher:		4	3	2	1
		Highly Effective	Effective	Improvement Necessary	Does Not Meet Standards
a. Expectations	Exudes high expectations and determination and convinces all students that they will master the material.	Conveys to students: This is important, you can do it, and I'm not going to give up on you.	Tells students that the subject matter is important and they need to work hard.	Gives up on some students as hopeless.	
b. Mindset	Actively inculcates a "growth" mindset: take risks, learn from mistakes, through effective effort you can and will achieve at high levels.	Tells students that effective effort, not innate ability, is the key.	Doesn't counteract students' misconceptions about innate ability.	Communicates a "fixed" mindset about ability: some students have it, some don't.	
c. Goals	Shows students exactly what's expected by posting essential questions, goals, rubrics, and exemplars of proficient work.	Gives students a clear sense of purpose by posting the unit's essential questions and the lesson's goals.	Tells students the main learning objectives of each lesson.	Begins lessons without giving students a sense of where instruction is headed.	
d. Connections	Hooks all students' interest and makes connections to prior knowledge, experience, and reading.	Activates students' prior knowledge and hooks their interest in each unit and lesson.	Is only sometimes successful in making the subject interesting and relating it to things students already know.	Rarely hooks students' interest or makes connections to their lives.	
e. Clarity	Always presents material clearly and explicitly, with well-chosen examples and vivid and appropriate language.	Uses clear explanations, appropriate language, and examples to present material.	Sometimes uses language and explanations that are fuzzy, confusing, or inappropriate.	Often presents material in a confusing way, using language that is inappropriate.	
f. Repertoire	Highly effective strategies, questions, materials, and technology, boosting the learning of all students.	Orchestrates effective strategies, questions, materials, technology, and groupings to foster student learning.	Uses a limited range of classroom strategies, questions, materials, and groupings with mixed	Uses only one or two teaching strategies and types of materials and fails to reach most students' success.	
g. Engagement	Gets all students highly involved in focused work and discussions in which they are active learners and problem-solvers.	Has students actively think about, discuss, and use the ideas and skills being taught.	Attempts to get students actively involved but some students are disengaged.	Mostly lectures to passive students or has them plod through textbooks and worksheets.	
h. Differentiation	Successfully reaches all students by skillfully differentiating and scaffolding and using peer and adult helpers.	Differentiates and scaffolds instruction and uses peer and adult helpers to accommodate most students' learning needs.	Attempts to accommodate students with learning deficits, but with mixed success.	Fails to differentiate instruction for students with learning deficits.	
i. Nimbleness	Defly adapts lessons to exploit teachable moments and correct misunderstandings.	Is flexible about modifying lessons to take advantage of teachable moments.	Sometimes doesn't take advantage of teachable moments.	Is rigid and inflexible with lesson plans and rarely takes advantage of teachable moments.	
j. Application	Consistently has all students summarize and internalize what they learn and apply it to real-life situations.	Has students sum up what they have learned and apply it in a different context.	Sometimes brings closure to lessons and asks students to think about applications.	Moves on at the end of each lesson without closure or application to other contexts.	

Overall rating: _____

Comments:

4. Monitoring, Assessment and Follow-Up

The teacher:	4	3	2	1
	Highly Effective	Effective	Improvement Necessary	Does Not Meet Standards
a. Criteria	Posts and reviews clear criteria for proficient work, including rubrics and exemplars, and all students internalize them.	Posts criteria for proficiency, including rubrics and exemplars of student work.	Tells students some of the qualities that their finished work should exhibit.	Expects students to know (or figure out) what it takes to get good grades.
b. Diagnosis	Gives students a well-constructed diagnostic assessment up front, and uses the information to fine tune instruction.	Diagnoses students' knowledge and skills up front and makes small adjustments based on the data.	Does a quick K-W-L (Know, Want to Know, Learned) exercise before beginning a unit.	Begins instruction without diagnosing students' skills and knowledge.
c. On-the-Spot	Uses a variety of effective methods to check for understanding; immediately unscrambles confusion and clarifies.	Frequently checks for understanding and gives students helpful information if they seem confused.	Uses mediocre methods (e.g., thumbs up, thumbs down) to check for understanding during instruction.	Uses ineffective methods ("Is everyone with me?") to check for understanding.
d. Self-Assessment	Has students set ambitious goals, continuously self-assess, and take responsibility for improving performance.	Has students set goals, self-assess, and know where they stand academically at all times.	Urges students to look over their work, see where they had trouble, and aim to improve those areas.	Allows students to move on without assessing and improving problems in their work.
e. Recognition	Frequently posts students' work with rubrics and commentary to celebrate progress and motivate and direct effort.	Regularly posts students' work to make visible their progress with respect to standards.	Posts some 'A' student work as an example to others.	Posts only a few samples of student work or none at all.
f. Interims	Works with colleagues to use interim assessment data, fine tune teaching, re-teach, and help struggling students.	Uses data from interim assessments to adjust teaching, re-teach, and follow up with failing students.	Looks over students' tests to see if there is anything that needs to be re-taught.	Gives tests and moves on without analyzing them and following up with students.
g. Tenacity	Relentlessly follows up with struggling students with personal attention so they all reach proficiency.	Takes responsibility for students who are not succeeding and gives them extra help.	Offers students who fail tests some additional time to study and do re-takes.	Tells students that if they fail a test, that's it; the class has to move on to cover the curriculum.
h. Support	Makes sure that students who need specialized diagnosis and help receive appropriate services immediately.	When necessary, refers students for specialized diagnosis and extra help.	Sometimes doesn't refer students promptly for special help, and/or refers students who don't need it.	Often fails to refer students for special services and/or refers students who do not need them.
i. Analysis	Works with colleagues to analyze and chart data, draw action conclusions, and leverage student growth.	Analyzes data from assessments, draws conclusions, and shares them appropriately.	Records students' grades and notes some general patterns for future reference.	Records students' grades and moves on with the curriculum.
j. Reflection	Works with colleagues to reflect on what worked and what didn't and continuously improve instruction.	Reflects on the effectiveness of lessons and units and continuously works to improve them.	At the end of a teaching unit or semester, thinks about what might have been done better.	Does not draw lessons for the future when teaching is unsuccessful.

Overall rating: _____

Comments:

5. Family and Community Outreach

The teacher:	4	3	2	1
	Highly Effective	Effective	Improvement Necessary	Does Not Meet Standards
a. Respect	Shows great sensitivity and respect for family and community culture, values, and beliefs	Communicates respectfully with parents and is sensitive to different families' culture and values.	Tries to be sensitive to the culture and beliefs of students' families but sometimes shows lack of sensitivity.	Is often insensitive to the culture and beliefs of students' families.
b. Belief	Shows each parent an in-depth knowledge of their child and a strong belief he or she will meet or exceed standards.	Shows parents a genuine interest and belief in each child's ability to reach standards.	Tells parents that he or she cares about their children and wants the best for them.	Does not communicate to parents knowledge of individual children or concern about their future.
c. Expectations	Gives parents clear, user-friendly learning and behavior expectations and exemplars of proficient work.	Gives parents clear expectations for student learning and behavior for the year.	Sends home a list of classroom rules and the syllabus for the year.	Doesn't inform parents about learning and behavior expectations.
d. Communication	Makes sure parents hear positive news about their children first, and immediately flags any problems.	Promptly informs parents of behavior and learning problems, and also updates parents on good news.	Lets parents know about problems their children are having but rarely mentions positive news.	Seldom informs parents of concerns or positive news about their children.
e. Involving	Frequently involves parents in supporting and enriching the curriculum for their children as it unfolds.	Updates parents on the unfolding curriculum and suggests ways to support learning at home.	Sends home occasional suggestions on how parents can help their children with schoolwork.	Rarely if ever communicates with parents on ways to help their children at home.
f. Homework	Assigns highly engaging homework, gets close to a 100% return, and promptly provides helpful feedback.	Assigns appropriate homework, holds students accountable for turning it in, and gives feedback.	Assigns homework, keeps track of compliance, but rarely follows up.	Assigns homework but is resigned to the fact that many students won't turn it in, and doesn't follow up.
g. Responsiveness	Deals immediately and successfully with parent concerns and makes parents feel welcome any time.	Responds promptly to parent concerns and makes parents feel welcome in the school.	Is slow to respond to some parent concerns and comes across as unwelcoming.	Does not respond to parent concerns and makes parents feel unwelcome in the classroom.
h. Reporting	Uses student-led conferences, report cards, and informal talks to give parents detailed and helpful feedback on children's progress.	Uses conferences and report cards to give parents feedback on their children's progress.	Uses report card conferences to tell parents the areas in which their children can improve.	Gives out report cards and expects parents to deal with the areas that need improvement.
i. Outreach	Is successful in contacting and working with all parents, including those who are hard to reach.	Tries to contact all parents and is tenacious in contacting hard-to-reach parents.	Tries to contact all parents, but ends up talking mainly to the parents of high achieving students.	Makes little or no effort to contact parents.
j. Resources	Successfully enlists classroom volunteers and extra resources from homes and the community to enrich the curriculum.	Reaches out to families and community agencies to bring in volunteers and additional resources.	Asks parents to volunteer in the classroom and contribute extra resources.	Does not reach out for extra support from parents or the community.

Overall rating: _____

Comments:

6. Professional Responsibilities

The teacher:		4	3	2	1
		Highly Effective	Effective	Improvement Necessary	Does Not Meet Standards
a.	Attendance	Has perfect or near perfect attendance (98-100%).	Has very good attendance (95- 97%).	Has moderate absences (6- 10%). If there are extenuating circumstances, state below.	Has many absences (11% or more). If there are extenuating circumstances, state below.
b.	Language	In professional contexts, speaks and writes correctly, succinctly, and eloquently.	Uses correct grammar, syntax, usage, and spelling in professional contexts.	Periodically makes errors in grammar, syntax, usage and/or spelling in professional contexts.	Frequently makes errors in grammar, syntax, usage, and/or spelling in professional contexts.
c.	Reliability	Carries out assignments conscientiously and punctually, keeps meticulous records, and is never late.	Is punctual and reliable with paperwork, duties, and assignments; keeps accurate records.	Occasionally skips assignments, is late, makes errors in records, and misses paperwork deadlines.	Frequently skips assignments, is late, makes errors in records, and misses paperwork deadlines.
d.	Professionalism	Presents as a consummate professional and always observes appropriate boundaries.	Demonstrates professional demeanor and maintains appropriate boundaries.	Occasionally acts and/or dresses in an unprofessional manner and/or violates boundaries.	Frequently acts and/or dresses in an unprofessional manner and violates boundaries.
e.	Judgment	Is invariably ethical, honest, and forthright, uses impeccable judgment, and respects confidentiality.	Is ethical and forthright, uses good judgment, and maintains confidentiality with student information.	Sometimes uses questionable judgment, is less than completely honest, and/or discloses student information.	Is frequently unethical, dishonest, uses poor judgment, and/or discloses student information.
f.	Above-and-beyond	Is an important member of teacher teams and committees and frequently volunteers for extra activities.	Shares responsibility for grade-level and school-wide activities and takes part in extra activities.	When asked, will serve on a committee and attend an extra activity.	Declines invitations to serve on committees and attend extra activities.
g.	Leadership	Frequently contributes valuable ideas and expertise and instills in others a desire to improve student results.	Is a positive team player and contributes ideas, expertise, and time to the overall mission of the school.	Occasionally suggests an idea aimed at improving the school.	Rarely if ever contributes ideas that might help improve the school.
h.	Openness	Actively seeks out feedback and suggestions from students, parents, and colleagues and uses them to improve performance.	Listens thoughtfully to other viewpoints and responds constructively to suggestions and criticism.	Is somewhat defensive but does listen to feedback and suggestions.	Is very defensive about criticism and resistant to changing classroom practice.
i.	Collaboration	Meets at least weekly with colleagues to plan units, share ideas, and analyze interim assessments.	Collaborates with colleagues to plan units, share teaching ideas, and look at student work.	Meets occasionally with colleagues to share ideas about teaching and students.	Meets infrequently with colleagues, and conversations lack educational substance.
j.	Growth	Actively reaches out for new ideas and engages in action research with colleagues to figure out what works best.	Seeks out effective teaching ideas from colleagues, workshops, and other sources and implements them well.	Can occasionally be persuaded to try out new classroom practices.	Is not open to ideas for improving teaching and learning.

Overall rating:

Comments:

Sources

- Alexandria Public Schools (Virginia) performance evaluation rubrics (2003)
- Aspire Charter Schools, California teacher evaluation rubrics (2003)
- Boston Public Schools Performance Evaluation Instrument (1997)
- City on a Hill Charter School (Boston) performance evaluation rubrics (2004)
- Conservatory Lab Charter School (Boston) performance evaluation rubrics (2004)
- *Enhancing Professional Practice: A Framework for Teaching* by Charlotte Danielson (ASCD, 1996)
- “Indicators of Teaching for Understanding” by Jay McTighe and Eliot Seif (unpublished paper, 2005)
- *Leading for Learning: Reflective Tools for School and District Leaders*, Michael Knapp et al., Center for the Study of Teaching and Policy, University of Washington (February 2003)
- *Linking Teacher Evaluation and Student Learning* by Pamela Tucker and James Stronge (ASCD, 2005)
- North Star Academy Charter School of Newark: Teaching Standards (2004-05)
- Roxbury Preparatory Charter School, Boston: Criteria for Outstanding Teaching (2004-05)
- *The Skillful Teacher* by Jon Saphier and Robert Gower (Research for Better Teaching, 1997)
- *The Three Big Rocks of Educational Reform* by Jon Saphier (Research for Better Teaching, 2005)
- Vaughn Next Century Learning Center, Chicago performance evaluation rubric (2004)
- *What Works in Schools: Translating Research into Action* by Robert Marzano (ASCD, 2003)

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SLG Development Process

From *Student Learning Objectives and Measures of Educator Effectiveness: The Basics* by the American Institute for Research, pages 3-7.

Though SLGs take on a variety of shapes and forms, the following five steps generally outline the first part of the SLG evaluation cycle, the SLG development process.

STEP 1: Identify Core Concepts and Standards The development process begins with an educator or a team of educators identifying the main content and standards for their grade or subject. In this step, the educator articulates the major concepts or skills that students will gain during the course. The content and standards should represent the essential learning of the course, such as key skills or overarching content, and the specific national or state standard(s) that align with that content. Content should be broad enough to represent the most important learning in the course, but narrow enough to be measured through one or more summative assessments.

STEP 2: Gather and Analyze Student Data

Gather baseline and trend data. SLGs are based on a clear understanding of the student population under the educator's charge. In this step, educators gather baseline and trend data to better understand how well prepared their students are for the content covered in the course. These data should include multiple sources, such as end-of-year data from the previous year, baseline data from district assessments, pretest data, student work samples, and benchmark tests or unit tests that address similar standards. Some states and districts also recommend using additional data including student transiency rates, pass/fail rates from earlier courses, and attendance rates. Some districts and states provide lists of

SLGs come in a variety of forms as follows:

Course-Level SLGs—focused on the entire student population for a given course, which often includes multiple classes

Class-Level SLGs—focused on the student population in a given class

Targeted Student SLGs—separate SLGs for subgroups of students that need specific support

Targeted Content SLGs—separate SLGs for specific skills or content that students must master

Tiered Targets—often used within a course- or class-level SLG to set differentiated targets for the range of student abilities

approved data sources for use in SLG development. An example from the Georgia Department of Education is provided in Appendix C. After identifying curricular priorities and gathering baseline data, the educator is prepared to conduct a detailed analysis.

Conduct an analysis of student data. This step helps the educator determine the current level of student learning and the potential for growth. The educator analyzes his or her current students' data to identify trends in student performance and pre-assessment skills and knowledge (e.g., What level of prerequisite knowledge and interest do my current students have?). The educator can also review past students' data to identify growth trends specific to the SLG course (e.g., What is the average amount of growth attained in this course? Are there specific skills or content strands that particularly challenge students?). Based on the data analysis, the educator can decide which knowledge or skills the SLG(s) will target. To aid in this step, it may be helpful to think about three groups of students: those who are prepared to access the course content, those who are not

SLG development generally includes the following five steps:

1. Identify core content and standards
2. Gather and analyze data
3. Determine the focus of the SLG
4. Select or develop an assessment
5. Develop a growth target and rationale

prepared (need some remediation), and those who are very well prepared (and may be in need of some enrichment). Educators can organize student data into a useful chart for this step. A modified example from the state of Ohio is available in Appendix D.

STEP 3: Determine the Focus of the SLG

Identify the student population of focus for the SLG. SLGs can focus on a single class, multiple class periods, or subgroups of students. Targeted objectives allow educators to address specific subpopulations that need attention regarding a particular standard or topic. The review of assessment data may highlight trends for a subset of students on a similar trajectory or may reveal specific content that a whole class finds challenging. The first instance may lead to a targeted student SLG, while the second instance may lead to a targeted content SLG.

This step requires educators to articulate why they have chosen a particular group of students or a narrow set of skills or content as a focus of their SLG. For example, if an analysis shows that 80 percent of a class is weaker in a necessary skill, but 20 percent of students have already mastered the skill, an educator might create one SLG for the students who are struggling in the skill and a separate SLG for the students who have already mastered the skill. Another approach is to create an SLG that applies to everyone in the class that has tiered targets or separate learning goals for different subgroups of students.

Determine the interval of instruction. SLGs can cover an entire school year, a quarter, a trimester, or a semester.³ Educators set the interval of instruction based on their course structure. Districts may also set requirements for educators regarding the interval of instruction when state or district timelines for evaluation results conflict with course structure. For example, some states require evaluation data to be submitted in March, prior to the administration of most end-of-course assessments. In such cases, educators write their SLGs for semesters or trimesters—with the interval of instruction focused more on meeting the needs of the evaluation cycle than on showing growth over the entire year.

STEP 4: Select or Develop an Assessment

Valid and reliable assessments of student achievement are necessary for maintaining SLG rigor. In this step, educators indicate which summative assessments will be used to assess student learning at the end of the interval of instruction and consider which formative assessments will be used to track progress and make midcourse adjustments.

Educators often choose their assessments based on guidance from the state or district. This guidance ensures that rigorous assessment standards are applied to educators uniformly. When multiple educators adopt the same SLG, it is advisable that all educators use the same assessment measure(s) to ensure that student progress is measured the same way and under the same testing conditions. For the purposes of SLG development, many states and districts recommend team-developed tests and advise educators to avoid using tests developed by an individual teacher.

Assessment options may include:

- Performance-based assessments, such as presentations, projects, and tasks graded with a rubric.
- Portfolios of student work, with samples throughout the year that illustrate knowledge and skills before and after a learning experience. A rubric is also needed for this type of assessment.
- State exams when value-added or standardized student growth scores are not available.
- Nationally normed tests.
- Educator, school-created, or district-created tests.

A CRITICAL NOTE:

SLGs are only as good as the baseline, trend, and assessment data upon which they are built. If these forms of data are invalid or unreliable, the growth target and SLG will be compromised.

Educators should identify assessments that are:

- Aligned to national or state standards and to the SLG growth target (meaning that they measure the skills or content addressed by the SLG).
- Reliable, meaning that they produce accurate and consistent results.
- Valid, meaning that they measure what they are designed to measure.
- Realistic in terms of the time required for administration.

Growth targets should be considered estimates and handled with a degree of caution during the early years of implementation. Educators may set targets that are too ambitious (and unachievable) or too low (and insufficiently challenging for teachers and students), resulting in misleading evaluation results. To support educators and their evaluators in building their skill in setting and judging growth targets, states and districts can provide explicit guidance and training. Training should include how to identify student trends through data analysis, how to set appropriate growth expectations based on data, and how to identify appropriate formative and summative assessments and their limitations.

STEP 5: Develop a Growth Target and Rationale

In this final step of the SLG development process, educators must understand assessment data and identify student achievement trends to set rigorous yet realistic student growth targets. In this step, the educator writes specific growth targets for students that align with state or national standards, district priorities, and course objectives. These growth targets can include specific indicators of growth (e.g., percentage correct or number of questions answered correctly) that demonstrate an increase in learning between two points in time. The target can be tiered for students in the classroom to allow all students to demonstrate growth or it can apply to all students in a class, grade, or subject. Table 1 provides examples of teacher-developed growth targets.

Explain the rationale for the growth target. High-quality SLGs include strong justifications for why the growth target is appropriate and achievable for the group of students. In this step, educators provide precise and concise statements that describe student needs and explain in detail how the baseline and trend data informed the development of the growth target(s). When applicable, rationales should also connect with school and district goals or priorities and can include instructional strategies used to achieve SLG goals. Additional SLG resources, including examples, checklists, and timelines, are provided in Appendix G.

A Note on Instructional Strategies:

Some SLO templates also include information on how the educator will achieve growth targets in the classroom by requiring that teachers identify the instructional strategies they will use during the SLO interval of instruction. Although critical to the SLO process, some educators feel that such detail is better left for professional learning community conversations and lesson planning and is not necessary for the SLO template. Regardless of where instructional strategies are noted, through conversation or on the SLO template, SLOs will only be useful if they inform educator performance. SLOs will not change the quality of instruction if they remain inactive documents disconnected from action. Therefore, conversation and thought around how the SLO is enacted are essential.

Guide for Developing Your SMART Goals

Your task is to develop two Student Learning Goals (SLG), one Professional Practice Goal (PPG) and one Professional Responsibility Goal (PRG) using a **SMART** (**S**pecific, **M**easurable, **A**ppropriate, **R**ealistic, **T**ime-bound) process. The SMART process is outlined on the next page.

Below is a checklist that will guide you in writing SLGs that are in accordance with SB290. You can write goals for your whole class, small groups or individual students, however, the combination of goals needs to address all your students. Your goal must cover a substantial timeframe as defined by your specific content area.

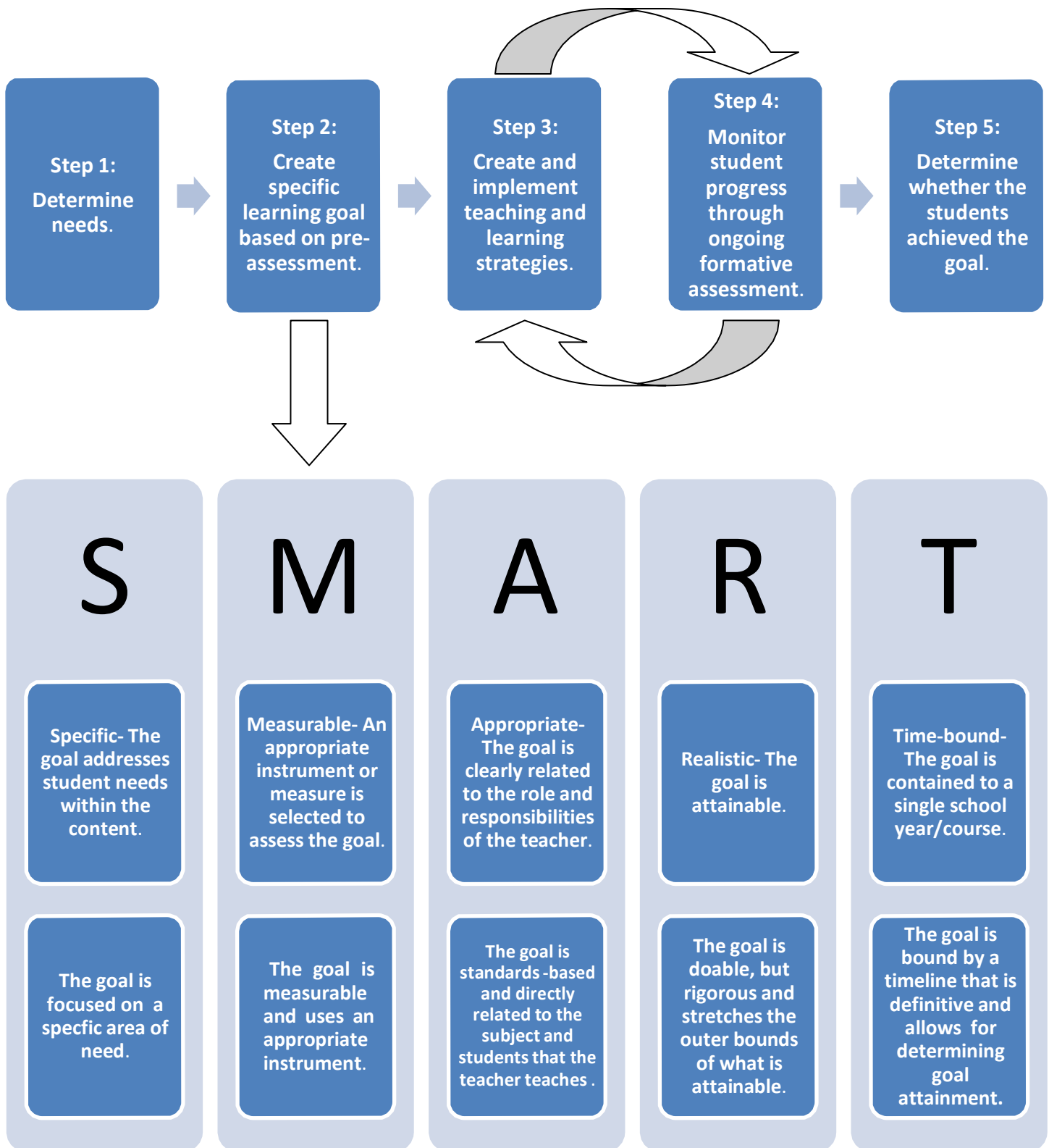
Guide for Developing SMART Student Learning Goals

Content	Context	Baseline Data	Types of Measures	Student Learning Goal	Strategies for Improvement
<p>The goal is being written around which grade/subject / level?</p> <p>Define the timeframe.</p>	<p>What are the characteristics or special learning circumstances of my class(es)?</p>	<p>What are the learning needs of my students?</p> <p>Attach supporting data/ pre-assessment.</p>	<p>Category 1 is mandatory if available. If the results of the test are not available until after your summative review, you must also use another measure.</p> <p>For Categories 2 & 3, only one measure is needed per SLG.</p>	<p>Does my goal meet the SMART criteria?</p>	<p>How will I help students attain this goal?</p> <p>Provide specific actions that will lead to goal attainment.</p>
<p>Did you identify one or more standards? Is the timeframe appropriate for the content you expect to teach? Is your timeframe appropriate for the assessment used? Your timeframe needs to be significant for your course. For example, it can be a unit, semester, or year long goal.</p>	<p>Did you address your total student population in your set of goals, unless you and your administrator agreed otherwise? An individual goal may cover a smaller group. Did you consider IEP, ELL, 504 plans? Did you consider historically underserved populations?</p>	<p>Did you identify the learning needs and skill level(s) of your students?</p>	<p>Do you use OAKS or EasyCBM? You must use it for one of your goals. Did you use measures in at least 2 of the 3 categories? How will you provide opportunities to measure growth throughout the year? Are the measures valid and reliable? What support will be needed from the district on administration and interpretation of results?</p>	<p>Did you use the flow chart? See the following page.</p>	<p>Did you identify observable or documentable strategies? Are your strategies appropriate for learning content and skill level? Do you continually examine and adjust to better meet student needs?</p>

During the End of Year Review of SLGs, PPG and PRG, the teacher and administrator will determine if the goals were:

- **Highly Effective** level is reserved for truly outstanding teaching that meets very demanding criteria; there will be relatively few ratings at this level.
- The **Effective** level describes solid, expected professional performance; teachers should feel good about scoring at this level.
- **Improvement Necessary** indicates that performance has real deficiencies; no teacher should be content to remain at this level (although some novices might begin here).
- **Does Not Meet Standards** level is clearly unacceptable. (ratings taken from Kim Marshall)

STEP-BY-STEP SMART GOAL PROCESS



*Adapted for Kentucky from Stronge, J. H., & Grant, L. W. (2009). *Student achievement goal setting: Using data to improve teaching and learning*. Larchmont, NY: Eye on Education, Inc.

Sample SMART Goals for Student Growth

Specific – the goal is focused on a specific area of student need within the content.

Measurable – the goal will be assessed using an appropriate instrument.

Appropriate – the goal is standards-based and directly related to the responsibilities of the teacher.

Realistic – the goal is doable, while rigorous, stretching the outer bounds of what is attainable.

Time-bound – the goal contained to a simple school year/course.

*Note that analysis of pre-assessment data is needed to truly determine if the goal is SMART.

*You also want to make sure the goal meets the needs of all students in your classroom.

<p style="text-align: center;">Writing in any content area</p> <p>For the 2011 – 12 school year, 100% of students will make measurable progress in writing. Each student will improve by one performance level in two or more areas of the writing rubric (audience/purpose, idea development, organization & structure). Furthermore, 80% of the students will score a “3” or better overall.</p>	<p style="text-align: center;">Social Studies</p> <p>During this school year, 100% of my students will improve in analyzing primary and secondary source documents. Each student will increase his/her ability to analyze documents by at least one level on the rating rubric. Furthermore, 75% of students will score at “proficient” or above.</p>
<p style="text-align: center;">Basic Technical Drawing/Design/CAD</p> <p>During this school year, 100% of my students will demonstrate measurable progress in basic technical drawing. Each student will improve his or her own performance by at least 50% as evidenced by a performance assessment rubric. At least 85% of my students will score proficient on the end of the year performance assessment according to line quality, neatness, accuracy, and title block.</p>	<p style="text-align: center;">Math</p> <p>For the school year, all of my students will demonstrate measurable growth in mathematics. All students will meet typical growth identified by the MAP assessment. At least 80% of my students will meet or exceed “proficient” on the end of the year MAP assessment.</p>
<p style="text-align: center;">Physical Education</p> <p>During the 2012-2013 school year, each of my sixth-grade students will improve on the Presidential Fitness subtests (curl-ups, shuttle run, endurance run/walk, pull-ups, V-sit reach) by an overall average of 20%.</p>	<p style="text-align: center;">Literacy Design Collaborative teachers (LDC) (any content area)</p> <p>For the 2011 – 12 school year, 100% of students will make measurable progress in writing. Each student will improve by one performance level in three or more areas of the LDC argumentation rubric. Furthermore, 80% of the students will score a “3” or better overall.</p>

<p>Reading in any content area</p> <p>For the 2012-2013 school year, 100% of my students will make measurable progress in reading. Each student will improve in fluency, comprehension level, and vocabulary knowledge on the AIMSweb assessment. At least 75% of students will move up one performance level as reported by AIMSweb.</p>	<p>Science</p> <p>For the current school year, my students will improve their ability to use scientific inquiry processes. Each student will improve by one or more levels on the district science assessment rubric in the areas of developing hypotheses, investigative design, and data analysis.</p>
<p>Art</p> <p>During the 9-week course, students will improve their understanding of art techniques. Students will improve their performance in the areas of identifying art elements/principles and critical analysis of elements/principles by one or more levels on the district art rubric.</p>	<p>Reading in any content area</p> <p>During the 2011-2012 school year, students will improve their ability to analyze text critically and use textual based evidence in their writing. Students will improve their performance by one or more levels in both of these areas as evidenced by a district common assessment and rubric. Furthermore, 80% of students will perform at the proficient level overall on the post-assessment.</p>
<p>FMD – mid functioning</p> <p>For this school year, all my students will improve their ability to independently shop for basic needs: identify items on a list and locate them in a store, ask for and follow directions from a store clerk, and use money to pay for items. Students will improve their baseline number of items successfully identified, located, and paid for by at least double.</p>	<p>Math Design Collaborative teachers (MDC)</p> <p>For the course, students will improve ability in two of the common core mathematical practices: 1) make sense of problems and preserving in solving them and 2) construct viable arguments and critique the reasoning of others. All students will increase their own score by 40% as assessed using a common assessment developed by regional MDC teachers.</p>
<p>FMD – low functioning</p> <p>During the school year, all my students will improve their fine motor skills in the areas of dressing, preparing food, and communication, as assessed by a classroom performance assessment of fine motor skills and dexterity. Each student will improve his or her ability by one or more levels on the rubric.</p>	<p>Primary</p> <p>For the 2012-2013 school year, 100% of my primary students will meet their benchmark goal on the DIBELS <i>oral reading fluency</i> assessment. Furthermore, all students' DIBELS <i>retell score</i> will be at least 25% of the oral fluency score.</p>

Marshall Rubric: Possible Evidence

*The Oregon Framework for Teacher and Administrator Evaluation and Support Systems defines multiple measures as “the tools, instruments, protocols, assessments, and processes used to **collect evidence** on performance and effectiveness. (p20).” This evidence, in turn, becomes the basis for a teacher’s multiple measures upon which professional practice goals and professional responsibility goals will be assessed.*

While reviewing rubrics, the evaluation design team appreciated the clarity of language used in the evidence portion of Marzano’s teacher evaluation rubric. The team believed that aligning his “possible teacher evidence” and “possible student evidence” to the Marshall rubric would enrich and support the collection of evidence process for teachers.

Therefore, our evaluation design team aligned Marzano’s evidences with Marshall’s six domains of a teacher’s performance. Next, we reviewed the evidence questions for clarity in our context. Some items were added and others were deleted or modified. In this way, the following pieces of evidence were modified from Marzano’s Art and Science of Teaching Framework.

This list of evidence serves as a guideline and a starting point. If, during your practice, you discover more please let us know.

A.Planning and Preparation for Learning

Possible Teacher Evidence:

- 1) Teacher engages students in activities that require students to examine similarities and differences between content and deepen understanding
 - a) Comparison activities
 - b) Classifying activities
 - c) Analogy activities
 - d) Metaphor activities
 - e) Summarize activities
 - f) Explain their thinking
- 2) The teacher can describe the rationale for
 - a) how the content is organized
 - b) the sequence of instruction
 - c) how content is related to previous lessons, units or other content
 - d) how lessons within the unit progress toward deep understanding and transfer of content
- 3) The teacher can describe how learning will be extended for proficient students
- 4) The teacher can describe resources within the classroom, school and community that will be used to enhance students' understanding of the content
- 5) The teacher can articulate how current technology will be used to enhance student learning
- 6) The teacher can describe the accommodations and adaptations that must be made for individual ELL, 504 and IEP students or groups of students within a lesson
- 7) The teacher can articulate how the needs of students who come from home environments that offer little support for schooling will be addressed
- 8) The teacher can articulate the ways in which the students' family resources will be addressed when assigning homework
- 9) The teacher can articulate the ways in which communication with the home will take into consideration family and language resources

Possible Student Evidence:

- 1) Students move easily about the classroom
- 2) Students make use of materials and learning centers
- 3) Students attend to examples of their work that are displayed
- 4) Students attend to information on the bulletin boards
- 5) Student artifacts indicate that their knowledge has been extended as a result of the activity
- 6) When asked about the activity, student responses indicate that they have deepened their understanding

Reflection Questions:

- 1) How are you organizing content and materials and activities so each new piece of information clearly builds on or connects to previous pieces?
- 2) How do you ensure that lessons and units include important content identified by the District and are based on the Common Core?

B. Classroom Management

Possible Teacher Evidence:

- Teacher provides cues or signals when a rule or procedure should be used
- Teacher organizes students into ad hoc groups for the lesson
 - Diads
 - Triads
 - Small groups up to about 5
- Teacher makes himself/herself available to students who need guidance or resources
 - Circulates around the room
 - Provides easy access to himself/herself
 - Eye Contact
 - Proximity
 - Tap on the desk
 - Shaking head, no
- Teacher notices when specific students or groups of students are not engaged or when the energy level in the room is low and reengages them in a variety of strategies:
 - Uses wait time
 - Uses response cards
 - Has students use hand signals to respond to questions
 - Uses choral response
 - Has students stand up and stretch or related activities when their energy is low
 - Vote with your feet
 - Go to the part of the room that represents the answer you agree with
 - Give-one-get-one activities that require students to move about the room
 - Nonverbal signals that a rule or procedure has been followed:
 - Smile
 - Nod of head
 - High Five
- Teacher uses positive reinforcement to:
 - Thank students for following a rule or procedure
 - Describe student behaviors that adhere to rule or procedure
 - Teacher notifies the home when a rule or procedure has been followed
 - Teacher uses tangible recognition when a rule or procedure has been followed:
 - Certificate of merit
 - Token economies
 - Teacher compliments students regarding academic and personal accomplishments
- Teacher creates a connection with student community:
 - Teacher engages in informal conversations with students that are not related to academics
 - Teacher uses humor with students when appropriate
 - Teacher smiles, nods, (etc.) at students when appropriate
 - Teacher does not exhibit extremes in positive or negative emotions
 - Teacher addresses inflammatory issues and events in a calm and controlled manner
 - Teacher interacts with all students in the same calm and controlled fashion
 - Teacher does not demonstrate personal offense at student misbehavior

- Teacher involves the home when appropriate (i.e. makes a call home to parents to help extinguish inappropriate behavior)

Possible Student Evidence:

- Students follow clear routines during class
- Students can describe established rules and procedures
- Students recognize cues and signals by the teacher
- Students regulate their own behavior
- Students ask for clarification when needed
- Students try to increase their level of engagement when prompted
- Students explain that the teacher expects high levels of engagement
- Multiple students or the entire class responds to questions posed by the teacher
- The students describe the teacher as in control of the class
- Students say that the teacher does not hold grudges or take things personally
- Students treat each other with respect
- Students accept consequences as part of the way class is conducted
- Students describe the teacher as fair in application of rules
- Students say the teacher expects everyone to participate

Reflection Question:

- How are you reflecting and adapting strategies to increase efficient classroom management?

C. Delivery and Instruction

Possible Teacher Evidence:

- Teacher uses frontloading strategies:
 - Preview questions before reading
 - K-W-L strategy or variation of it
 - Outline
 - Graphic organizer
 - Students brainstorm
 - Anticipation guide
 - Motivational hook/launching activity
 - Anecdotes
 - Short selection from video
 - Word splash activity to connect vocabulary to upcoming content
 - SIOP strategies
 - Level of excitement
- Teacher stops at strategic points in a presentation
- Teacher uses effective questioning strategies to review information:
 - Explain and defend
 - Make elaborative inferences
 - Summary
 - Problem that must be solved using previous information
 - Questions that require a review of content
 - Demonstration
 - Brief practice test or exercise
- Teacher has a learning goal posted so that all students can see it
 - The learning goal is a clear statement of knowledge or information
- Teacher makes reference to the rubric and the learning goal throughout the lesson
- Teacher has a scale or rubric that relates to the learning goal posted so that all students can see it
- Teacher establishes the need to generate and test hypotheses
- Teacher develops impromptu games such as making a game out of which answer might be correct for a given question
- Teacher has students examine multiple perspectives and opinions about the content
- Teacher is aware of student interests and makes connections between these interests and class content
- Teacher structures activities that ask students to make connections between the content and their personal interests
- Teacher encourages students to identify interesting information about the content
- Teacher uses guest speakers to provide information about the content
- Teacher asks students to further explain their answers when they are incorrect
- Teacher rephrases and breaks a question into smaller and simpler parts when a student answers a question incorrectly

Possible Student Evidence:

- Students can make predictions, link prior knowledge, and provide a purpose to upcoming

content

- Student engagement:
 - Students volunteer answers to inferential questions
 - Students provide explanations and “proofs” for inferences
 - Students can describe the previous content on which new lesson is based
 - Student responses to class activities indicate that they recall previous content
- Group Work
 - Students explain how the group work supports their learning
 - While in groups students interact in explicit ways to deepen their knowledge of informational content or, practice a skill, strategy, or process
 - Asking each other questions
 - Obtaining feedback from their peers
 - Students explain how groups support their learning
 - Students use group activities to help them generate and test hypotheses

Reflection Question:

- How do you ensure that lessons and units include highly effective questioning strategies and best practices that guide students to a higher level of thinking?

D. Monitoring, Assessment, and Follow-Up

Possible Teacher Evidence:

- Teacher acknowledges and celebrates the final status and progress of the entire class
- Teacher uses a variety of ways to celebrate success
 - Show of hands
 - Certification of success
 - Parent notification
 - Round of applause
- Teacher employs formal group processing strategies
 - Jigsaw
 - Reciprocal Teaching
 - Concept attainment
- Teacher asks students to summarize the information they have learned
 - Graphic organizers
 - Pictures
 - Pictographs
 - Flow charts
 - Mnemonics
- Teacher asks students to self-assess their learning
- Teacher communicates a clear purpose for homework that allows students to practice and deepen their knowledge independently
- Teacher extends an activity that was begun in class to provide students with more time
- Teacher engages students in guided and independent practice
- Teacher guides review process for students
- The teacher provides opportunity for students to reflect upon lesson

Possible Student Evidence:

- Students can explain what they have just learned
- Students ask clarification questions
- Groups are actively discussing the content
- Students' summaries, notes and nonlinguistic representations (graphs, graphic organizers, sketch-to-stretch activity, etc.) include critical content
- Students perform the skill, strategy, or process with increased confidence and competence
- Students make corrections to information previously recorded about content

Reflection Question:

- How effective have your specific instructional techniques been regarding the achievement of students?

E. Family and Community Outreach

Possible Teacher Evidence:

- The teacher fosters collaborative partnerships with parents to enhance student success in a manner that demonstrates integrity, confidentiality, respect, flexibility, fairness and trust
- The teacher ensures consistent and timely communication with parents regarding student expectations, progress and/or concerns
- The teacher encourages parent involvement in classroom and school activities
- The teacher demonstrates awareness and sensitivity to social, cultural and language backgrounds of families
- The teacher uses multiple means and modalities to communicate with families
- The teacher responds to requests for support, assistance and/or clarification
- The teacher respects and maintains confidentiality of student/family information
- Students and parents can describe how the teacher interacted positively with them
- The teacher can describe situations in which he or she helped extinguish negative conversations about students and parents

Reflection Question:

- How do you communicate with students and parents to foster learning, promote positive home/school relationships and address parent concerns in a prompt, responsive manner?

F. Professional Responsibilities

Possible Teacher Evidence:

- The teacher works cooperatively with appropriate school personnel to address issues that impact student learning
- The teacher establishes working relationships that demonstrate integrity, confidentiality, respect, flexibility, fairness and trust
- The teacher accesses available expertise and resources to support students' learning needs
- The teacher can describe situations in which he or she interacts positively with colleagues to promote and support student learning
- The teacher keeps track of specific situations during which he or she has sought mentorship from others
- The teacher actively seeks help and input from appropriate school personnel to address issues that impact instruction
- The teacher keeps tracks of specific situations during which he or she mentored other teachers
- The teacher contributes and shares expertise and new ideas with colleagues to enhance student learning in formal and informal ways
- The teacher serves as an appropriate role model (mentor, coach, presenter, researcher) regarding specific classroom strategies and behaviors
- The teacher
 - performs assigned duties
 - follows policies
 - regulations and procedures
 - maintains accurate records
 - student progress
 - completion of assignments
 - non- instructional records
- The teacher fulfills responsibilities in a timely manner
- The teacher understands legal issues related to students and families
- The teacher demonstrates personal integrity
- The teacher participates in school activities and events as appropriate to support students and families
- The teacher serves on school and district committees
- The teacher participates in and keeps track of staff development opportunities and participation in school or district initiatives

Reflection Question:

- How do you interact and collaborate with other teachers, mentors and professionals regarding research, new ideas and planning?

InTASC Standards

These are the standards mandated by SB290. Kim Marshall's rubric, adopted by Lowell School District, has been aligned to these standards and approved by the state of Oregon.

Domain 1: The Learner and Learning

Standard #1: Learner Development

The teacher understands how learners grow and develop, recognizing that patterns of learning and development vary individually within and across the cognitive, linguistic, social, emotional, and physical areas, and designs and implements developmentally appropriate and challenging learning experiences.

Standard #2: Learning Differences

The teacher uses understanding of individual differences and diverse cultures and communities to ensure inclusive learning environments that enable each learner to meet high standards.

Standard #3: Learning Environments

The teacher works with others to create environments that support individual and collaborative learning, and that encourage positive social interaction, active engagement in learning, and self-motivation.

Domain 2: Content Knowledge

Standard #4: Content Knowledge

The teacher understands the central concepts, tools of inquiry, and structures of the discipline(s) he or she teaches and creates learning experiences that make these aspects of the discipline accessible and meaningful for learners to assure mastery of the content.

Standard #5: Application of Content

The teacher understands how to connect concepts and use differing perspectives to engage learners in critical thinking, creativity, and collaborative problem solving related to authentic local and global issues.

Domain 3: Instructional Practice

Standard #6: Assessment

The teacher understands and uses multiple methods of assessment to engage learners in their own growth, to monitor learner progress, and to guide the teacher's and learner's decision making.

Standard #7: Planning for Instruction

The teacher plans instruction that supports every student in meeting rigorous learning goals by drawing upon knowledge of content areas, curriculum, cross-disciplinary skills, and pedagogy, as well as knowledge of learners and the community context.

Standard #8: Instructional Strategies

The teacher understands and uses a variety of instructional strategies to encourage learners to develop deep understanding of content areas and their connections, and to build skills to apply knowledge in meaningful ways.

Domain 4: Professional Responsibility

Standard #9: Professional Learning and Ethical Practice

The teacher engages in ongoing professional learning and uses evidence to continually evaluate his/her practice, particularly the effects of his/her choices and actions on others (learners, families, other professionals, and the community), and adapts practice to meet the needs of each learner.

Standard #10: Leadership and Collaboration

The teacher seeks appropriate leadership roles and opportunities to take responsibility for student learning, to collaborate with learners, families, colleagues, other school professionals, and community members to ensure learner growth, and to advance the profession.

Student Learning Goal 1 Evidence

Student Learning Goal 2 Evidence

Professional Practice Goal Evidence

Professional Responsibility Goal Evidence

Lowell School District #71

Board Calendar 2014-2015

Regular Board Meetings are scheduled for the 4th Monday of the month, with the Public Meeting beginning at 7:00 pm. When there is holiday on the 4th Monday, normally, the meeting will be held on the Third Monday. Study Session date are tentatively scheduled to provide the opportunity for the Board to meet to study an individual aspect of the District.

July – The Board will not hold a Regular July Meeting

August 25, 2014

September 8, 2014 (Update on Educational and Students Services of 2014-2015)

September 22, 2014

~~October 6, 2014 (Study Session – Team Building – How to Be a Functional Team – 4:00 – 9:00 pm)~~ **Postponed until 2015-2016**

October 27, 2014

~~November 3, 2014 (Study Session)~~ **Canceled**

November 24, 2014

*December 15, 2014

January 26, 2015 (Common Core Standards Report)

February 2, 2015 – (Study Session – Superintendent's Evaluation Process and Product and Strategic Plan Mid-course Report Provided)

February 23, 2015 – (Closed Session - Appraisal of Each Staff Member)

March 9, 2015 (Study Session – Professional Development and Educational Change Process for 2015/2016)

March 23, 2015

April 15, 2015 – (First Budget Committee Meeting)

April 27, 2015

May 4, 2015 – (Second Budget Committee Meeting)

*May 18, 2015 – (Community Forum – State of the District and Budget Presentation)

June 22, 2015

*July 6, 2015 – Board Organization Meeting

*Alternative Regular Board Meeting Day – Due to scheduling conflict or holidays

For the 2015/2016 school year, recognizing that we may have a new board member, the Board committed to deferring the 2014-2015 Study Session entitled, Team Building – How to Be a Functional Team– 4:00 – 9:00 pm, for the 2015/2016 Board. If we have a new board member, we will also review the Strategic Plan and Board Operations Handbook during the year.

Approved: February 24, 2014

Revised: June 23, 2014

Approved: July 14, 2014

Visa application Information

Request to apply for six VISA cards through Siuslaw Bank. We are requesting \$10,000 credit limits for the following employees:

Walt Hanline
Debi McNamara
Kay Graham
Nathan Bowers
Billy Reid

...and \$5,000 credit limit for Randy Doan.

The application is attached. The annual fee is \$25 per card, totaling \$150 per year.

Currently the district has three VISA cards through US Bank, one for Walt, one for the business office and one for the high school. There is a \$5,000 combined maximum on these cards, which is not enough to meet our needs.

We would like to get new VISA cards through Siuslaw Bank for the convenience of being able to make quick payments on our account if need be.

We would keep the high school US Bank VISA card, because the card name is "Lowell School District" only and can be used by our coaches and drivers for away games. The other two US Bank VISA cards would be cancelled.



Siuslaw Bank
Business Credit Card Application
Non-Profit/Government Entity



The terms and condition of our Business Credit Card Agreement and Disclosures Statement govern all accounts issued to non-business entities. Individual account numbers are assigned to each authorized individual. Individual credit lines are not to exceed, in aggregate, the total credit line established. Each individual card account has a \$25.00 annual fee.

As disclosed in the Cardholder Agreement and Disclosure Statement, the current Annual Percentage Rate is 13.50%. This rate is subject to change with the required advance notice.

Entity Name: Lowell School District #71		Date Established: <input checked="" type="checkbox"/> Government <input type="checkbox"/> Non-Profit	
Entity Name To Be Shown On Card: (21 Characters Max)* LOWELL SCHOOL DISTRICT		Type of Entity: School district	
Entity Address (Street, City, State, Zip Code) 65 S. Pioneer Street Lowell, OR 97452		Business Telephone Number: 541-937-8405	
Entity Checking Account Number: 47021055		Federal Tax ID Number: 93-6015591	

*Business Name as shown will be listed on line two of each card issued to the individuals included on page 2

Example: Joe Customer
Joe's Body Shop

References

With Siuslaw Bank (List type of account, opening date, branch)
With Other Financial Institutions (List name, address, account type)
Trade Suppliers (List name, address, phone number, contact name)
Others (List name, Address, phone number, contact name)
Please Provide The Following: <input type="checkbox"/> Last 2 Years' Financial Statements <input type="checkbox"/> Last 2 Years' Tax Returns

Officer(s) Acknowledgement

Acknowledgement and Amendments. The 'Entity' understands and agrees to the terms and conditions in this Agreement and the Cardholder Agreement and Disclosure Statement for Business Cards (collectively the "Agreements"). 'Entity' specifically and unconditionally authorizes Bank, or its authorized agent, to debit any overdue fees, costs, chargebacks, fines, penalties, expenses or obligations under the Agreement(s) and/or any contractual relationship with Bank from any 'Entity' checking account or other account(s) owned or controlled by the 'Entity.' The 'Entity' agrees to pay all costs and expenses of whatever nature, including attorneys' fees and other legal expenses, incurred by or on behalf of Bank in connection with the enforcement of the Agreements. It is understood and acknowledged that Agreements have been reviewed, authorized, and approved by Entity's Board of Directors. By signing this Agreement, the Entity's Officers are confirming this authority, but are not parties to the Agreements.

All Officers must be included below. By signing below, each Officer agrees to the above.

	Name	Title	% of Ownership	Signature
1				
2				
3				
4				
5				



Siuslaw Bank
Business Credit Card Application
Non-Profit/Government Entity



Names of Individuals to be Issued Cards

Mailing Address for Cards Issued (all entity and individually issued cards will be sent to this address):

Entity Name: <u>Lowell School District #71</u>	For Branch Use Only: Authorized Signature _____
Street: <u>65 S. Pioneer Street</u>	
City: <u>Lowell</u>	
State: <u>OR</u>	
Zip Code: <u>97452</u>	

First name, Middle Initial, Last Name, Title (if desired) (21 Characters Max) Individual name will appear on 1st line. Entity name listed on page 1 will appear on 2nd Line.	Individual Credit Line Requested	Individual Card Holder Signature
WALT HANLINE	\$ 10000	
DEBI MCNAMARA	\$ 10000	Debi McNamara
KAY GRAHAM	\$ 10000	
NATHAN BOWERS	\$ 10000	
BILLY REID	\$ 10000	
RANDY DOAN	\$ 5000	
	\$	
	\$	
	\$	
	\$	

Fiscal Services is *On the Move*, too!

Presentation by Debi McNamara

Exciting things are happening in our Fiscal Services/Human Resources department this year. Having Maureen Weathers on board has been a huge asset to our district and this additional help has resulted in our department to become far more organized and efficient. The Charter School books are set up and the system is working well.

After learning of my goal to eventually be our Business Manager, Dr. Hanline approved my participation of a three year training program called “New Business Manager Institute” through Oregon Association of School Business Officials. The cost for this program is \$4,200 and the curriculum consists of seven modules:

Year 1 - Four modules will be completed including Finance, Human Resources, Managing Yourself and Managing People

Year 2 - Three modules will be completed including Facilities, Risk Management and Other Services including Transportation, Food Service, etc.

Year 3 - will be a year where we simply try to keep folks connected to the group to share their insights and to assist them in staying on track for completion of the ASBO Int'l SFO Certification program (which requires completion of the 2 part exam and a minimum years of experience).

The program includes all of the conference fees as noted above for years 1 and 2; it includes online access to curriculum and virtual meetings every two weeks during the time each module is being completed. We will continue to provide mentors and as much assistance and resource material as we can.

Additionally, I won a \$1,500 scholarship to attend the Association of School Business Officials 4-day conference in Kissimmee, Florida last month! I will be discussing the workshops that I attended at this conference, as well as the OASBO Summer Conference that I attended in July. Topics will include:

- *Time management
- *School Security
- *Sustainable building resources and practices—going green!
- *Staff and student wellness programs

Lowell School District #71
2014-15 General Fund Financial Summary
September 30, 2014

	Budget	Actual: Jul-Sep		Projected: Oct-Jun		Projected for Year	Over/(Under) Budget	
Resources								
State School Fund	2,855,000	864,645	30.4%	1,981,020	69.6%	2,845,665	(9,335)	-0.3%
Property Tax	871,400	3,355	0.4%	867,950	99.6%	871,305	(95)	0.0%
Miscellaneous/Local Revenues	40,000	12,225	29.7%	29,000	70.3%	41,225	1,225	3.1%
Common School Funds	28,000	-	0.0%	29,786	100.0%	29,786	1,786	6.4%
Rent	27,000	3,450	14.3%	20,700	85.7%	24,150	(2,850)	-10.6%
Small High School Grant	14,000	-	0.0%	14,000	100.0%	14,000	-	0.0%
Indirect Fees on Grants	5,000	3	0.1%	4,997	99.9%	5,000	-	0.0%
County School Funds	4,000	-	0.0%	4,000	100.0%	4,000	-	0.0%
Business Services to Charter	-	4,000	20.0%	16,000	80.0%	20,000	20,000	-
Interest	3,400	1,003	27.0%	2,718	73.0%	3,721	321	9.4%
Total Revenues	3,847,800	888,681	23.0%	2,970,171	77.0%	3,858,852	11,052	0.3%
Beginning Fund Balance	245,000	385,000	100.0%	-	0.0%	385,000	140,000	57.1%
Total Resources	4,092,800	1,273,681	30.0%	2,970,171	70.0%	4,243,852	151,052	3.7%
Requirements								
Salaries	1,407,399	205,481	15.0%	1,160,505	85.0%	1,365,986	(41,413)	-2.9%
Benefits	980,030	130,555	14.7%	758,229	85.3%	888,784	(91,246)	-9.3%
Purchased Services	417,010	41,464	10.0%	374,125	90.0%	415,589	(1,421)	-0.3%
Supplies and Materials	275,325	99,386	35.6%	180,164	64.4%	279,550	4,225	1.5%
Capital Outlay	10,000	-	-	10,000	100.0%	10,000	-	-
Other	70,560	71,258	89.6%	8,280	10.4%	79,538	8,978	12.7%
Charter School Payments	538,000	69,072	13.6%	440,654	86.4%	509,726	(28,274)	-5.3%
Transfers	228,539	-	0.0%	228,539	100.0%	228,539	-	0.0%
Total Expenditures	3,926,863	617,216	16.3%	3,160,496	83.7%	3,777,712	(149,151)	-3.8%
Contingency/Carryover	165,937	-	0.0%	-	0.0%	466,141	300,204	180.9%
Total Requirements	4,092,800	617,216	14.5%	3,160,496	74.5%	4,243,852	151,052	3.7%

(1) Revenue that was received after the budget was prepared exceeded expectations. The May SSF estimate/reconciliation was \$79,000 more than anticipated. The year end payments from districts for the Lowell students in their charter schools were also more than anticipated.

(2) Significant health care savings due to employees' personal health insurance decisions and staff FTE being charged to funds outside of the general fund.

(3) Based on current ADMr figure of 84 and 19 students from other districts without open enrollment agreements.