

Lowell School District

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

Board of Director's Meeting

December 15, 2014

Professional Development Center

6:00 pm – Study 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--6:00 pm Professional Development Center

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

2.0 STUDY SESSION

- 2.1 Lowell School Board Governance Manual—Presented by Dr. Hanline (Attachment)
- 2.2 Convene to Executive Session

3.0 EXECUTIVE SESSION

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

4.0 OPENING OF PUBLIC SESSION

- 4.1 Public Session Call to Order
- 4.2 Pledge of Allegiance
 - 4.2.1 Led by Chairman of the Board—Mr. McCallum
- 4.3 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

4.4 Approval of Agenda – December 15, 2014

Recommended Action: Approval of Agenda

MOTION: ___ 2nd: ___ AYES: ___ NOES: ___ ABSTAIN: ___

5.0 **COMMUNITY/SCHOOL PRESENTATIONS**

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

6.0 **PUBLIC COMMENT**

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

7.0 **CONSENT AGENDA—consolidated motion**

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

7.1 Board Minutes from Date Board Meeting (Attachment)

7.2 Check Register: 26324-26430 (Attachment)

7.3 Open Enrollment Form (Attachment)

7.4 OSBA Updates (Attachments)

MOTION: ___ 2nd: ___ AYES: ___ NOES: ___ ABSTAIN: ___

8.0 **ACTION DISCUSSION**

8.1 Approve Senior Trip—Presented by members of the Lowell High School Graduating Class of 2015

MOTION: ___ 2nd: ___ AYES: ___ NOES: ___ ABSTAIN: ___

8.2 Approve District Master Plan—Presented by Dr. Hanline (Attachment)

MOTION: ___ 2nd: ___ AYES: ___ NOES: ___ ABSTAIN: ___

8.3 Approve Board Policy approval process and charts—Presented by Dr. Hanline (Attachments)

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

8.4 Approval to move forward with the renovation of the LHS gym floor and football field—

Presented by Dr. Hanline

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

8.5 Approval of the transportation MOU between MVA and Lowell School District—Presented by Dr. Hanline (Attachment will be available at the meeting)

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

8.6 Approve Resolution 2014-15-04 to fund purchase of computers for the student body—Presented by Dr. Hanline (Attachment will be available at the meeting)

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

9.0 **INFORMATION AND STUDY**

9.1 Update on the Master Building Plan for Lowell School District—Presented by Dr. Hanline

9.2 Briefing on the school wide and classroom management system changes—Presented by Ms. Graham

9.3 Report on Graduation rates—Presented by Ms. Graham

9.4 Utility Report—Referred by Ms. McNamara

9.5 Mountain View Academy Charter School Report—Referred by Ms. McNamara

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

9.7 OSBA Conference report and feedback—Presented by attendees; referred by Dr. Hanline

9.8 Student Body Representative Report—Presented by Ms. Owsley

9.9 Principals Report—Presented by Ms. Graham

9.10 Superintendent's Report—Presented by Dr. Hanline

9.11 Board Members' Report

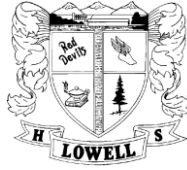
10.0 **ADJOURNMENT**

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

LANE COUNTY SCHOOL DISTRICT 71

Lowell/Fall Creek

www.lowell.k12.or.us



Board Operations Handbook

The Board of Education is entrusted by the community to uphold the Constitutions of Oregon and the United States, to protect the public interest in schools, and to ensure that a high quality education is provided to each student.

Board of Directors

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

Superintendent

Walt L. Hanline, Ed.D.

Unity of Purpose, Roles and Responsibilities, Norms, Agreements

This handbook reflects the governance team's work on creation of a framework for effective governance. This involves ongoing discussions about unity of purpose, roles, norms, and coming to agreement on protocols for formal structures that enable the governance team to continue to perform its responsibilities in a way that best benefits all children.

This Operations Handbook was developed in a Board Governance workshop conducted on August 17, 2013, with the assistance of Walt L. Hanline, Ed.D., Superintendent. The Operations **Handbook was approved on September 23, 2013**

Building a Governance Team

Unity of Purpose

School district governance is the act of transforming the needs, wishes, and desires of the community into policies that direct the community's schools.

In a school district, the Board and Superintendent work together as a governance team. For a governance team to work together effectively, members need to: Maintain a unity of purpose; agree on and govern within appropriate roles; create and sustain a positive governance culture and; create a supportive structure for effective governance.

What do we as a governance team want to accomplish? What do we stand for?

- Our shared purpose is to have the best learning environment for all students.
- We want to build trust and move the District forward.
- We want to be an effective team.
- We want to understand our individual jobs and collective responsibilities.
- We want to be a team with a common focused direction so we are not a distraction to the District or community, but a catalyst for the focused efforts of employees, so that the community can see evidence of this focused direction.
- We want to be partners with the staff in positive change.
- We want to oversee the creation and implementation of a first-rate program and first-rate facilities, making sure we continue to improve – never resting on our laurels.
- We want to perpetuate a legacy of positive culture as people come and go.

Roles and Responsibilities

Mutual agreement on the roles of the Board and Superintendent

The role of a Board member is to stay focused on the big picture while fulfilling five responsibilities in a series of job areas. These five responsibilities are:

1. We set the direction.
2. We establish the structure.
3. We provide support.
4. We ensure accountability.
5. We act as community leaders.

We carry out these responsibilities in each of the following job areas:

- Setting the District's Direction
- Student Learning and Achievement
- Finance
- Facilities
- Human Resources
- Policy
- Judicial Review
- Collective Bargaining
- Community Relations and Advocacy

The Superintendent assists the Board in carrying out its responsibilities in each of the job areas, and leads the staff toward the accomplishment of the agreed upon District vision and goals.

Creating and Sustaining a Positive Governance Team Culture

Culture is the positive or negative atmosphere created by the way people in an organization treat each other. Teams have unwritten (implicit) or written (explicit) agreements about how they will behave with each other and others. These behavioral ground rules, often called norms, enable teams to build and maintain a positive culture or shift a negative one.

Governance Norms

In addition to meeting the norms below in order to create a positive culture and atmosphere, we agree to act in ways that will help us meet the CSBA Professional Governance Standards.

WE AGREE TO –

- Keep from taking disagreements personally (individuality is embraced, respected).
- To show respect (never dismiss/devalue others).
- Make a commitment to effective deliberation, each listening openly while everyone is allowed to express his or her point of view.
- Make a commitment to open communication, honesty, no surprises.
- Commit the time necessary to govern effectively. This means being there, being knowledgeable, participating, understanding the full scope of being a Board Member, and being willing to take on all the responsibilities involved.
- Be collaborative (this is the way we operate)!
- Maintain confidentiality (builds trust).
- Look upon history as lessons learned; focus on the present and the future.

AND – ABOVE ALL –

- Focus on students' best interest – on what's best for the students! This is what we do! It is the touchstone that allows us to have our differences.

Board Protocols

Leadership Responsibility and Roles of the Board

The only authority to direct actions rests with the quorum of the Board sitting at the Board table. A majority vote sets such direction. Individuals can request action by bringing up a new idea, explaining their interest in a particular course of action, and working to get a Board majority to support moving in that direction. When a majority of the Board, sitting in a formal meeting, requests action, that request should be made in the context of the intended results, not the methods used to achieve those results.

As a Board, we recognize that no individual member of the Board, by virtue of holding office, shall exercise any administrative or investigatory responsibility with respect to the schools; nor as an individual, command the services of any employee. Board members are to channel their requests and/or concerns directly to the Superintendent (and, if necessary, through the Board President).

Board Policies of the District relate to the role and responsibility of the Board collectively and Board members individually.

In responding to concerns regarding the work of the District, Board members will:

- *Receive* the information, remembering that only one side of the story is being presented (listening)
- *Repeat* the information – paraphrase to ensure understanding
- *Remind* the individual that a Board member has no authority as an individual and share the appropriate line of command and process to follow to address their concern.
- *Re-Direct* – Thank them for sharing their thoughts and refer them to the appropriate staff member and, if necessary, encourage them to initiate the formal complaint process.
- *Report* – In a timely manner, inform the Superintendent.

When interacting with the public, Board members will hold to the highest level of professional conduct, including emphasizing the positive aspects of the District.

The Board's Role and Relationship with the Staff and Community

When individually visiting schools or departments, as a professional courtesy, Board members are encouraged to notify the Principal that they will be visiting a school or department. The Principal should be free to relate that the visit could be disruptive and suggest rescheduling the visit.

The Board member shall provide input to the Superintendent on issues or concerns that may arise from such a visit.

It is imperative that a staff member not provide any information to a Board member beyond the information that would be provided to any regular community member. Staff members are directed to relay requests from Board members to their supervisor to ensure that appropriate information is provided to all Board members.

Management staff are directed to relay requests from Board members to the Superintendent to ensure that appropriate information is provided to all Board members.

This protocol does not imply a censoring of any private and informal conversations.

Board Meetings and the Agenda

Meetings of the Board are held in public, but are not open-forum town hall meetings. Meetings will be conducted in such a way as to allow the public to provide input in the time allotted to ensure that multiple voices of the community inform Board deliberations; however, when the Board deliberates, it will be a time for the Board to listen and learn from each other, taking public input into consideration without re-engaging the public.

Board meetings will be on the Fourth Monday's of each month. Each Board meeting will begin with Closed Session at 6:00 pm. The Regular Public Meeting will begin at 7:00 pm. Study Sessions may be scheduled and shall be scheduled at the discretion of the Board.

Board Meetings and the Agenda (continued)

The Superintendent, with the support of staff, will create each Board Agenda. In advance of the preparation of the Board Agenda, Board members may request items to be placed on the agenda. The Board President and the Superintendent will discuss the contents of the agenda and the process that will be followed at the meeting, in advance of the Board Meeting.

The Board recognizes the importance of developing a system of internal control procedures in order to help fulfill its obligation to monitor and safeguard district resources and to ensure that invoices are paid expeditiously. The non-payroll check process protocol is as follows:

Step 1 - The Board shall receive, via email, each register of checks.

Step 2 - Each Board member shall review the check register, within 72 hours of receipt.

Step 3 - Each Board member shall communicate, via email, to the Superintendent the checks that are of concern. Said checks shall be held by the Superintendent and placed under a separate action item for the next Board meeting.

Step 4 - Staff will mail the remaining (not held) checks to each vendor, in advance of the next Board meeting. Said register of "not held checks" shall be placed and formally approved under the Consent Agenda of the next Board meeting.

Board member will make every effort to submit, prior to the meeting, questions they intend to ask so that the Superintendent and district staff has the opportunity to prepare to answer Board members' questions at Board meetings.

When an individual Board member requests information, that information will be provided to all Board members. If unforeseen questions arrive during the meeting, Board members will acknowledge their question or comment as spontaneous and that they understand that staff may not have the information on hand to answer the question.

Board Meetings and the Agenda (continued)

Individual Board members are expected to self-monitor compliance to the Public Meeting Law, including limiting Closed Session to the agenda item(s). Board members need equal access to information, and to operate within the Law. The use of email communication is subject to the Law. The Superintendent shall forward questions and answers to all Board members. Board members, when responding, shall not “reply to all.”

Board members will read the information provided to them and commit to ongoing professional development and training.

Board members, when attending professional development activities, shall provide a report of the activity at the next meeting. Out of state training shall be approved by the Board, in advance of the conference.

Each Board member has the obligation, in serving the community, to vote or abstain on items presented before the Board. When abstaining, the Board member must state the reason for the abstention.

The Board shall strive for brevity in deliberations, keeping remarks brief and to the point so that all opinions can be expressed and meetings can be efficient. Addressing each agenda item the Board shall, normally, adhere to the following process:

- Input from the Community
- Staff Presentation/addressing questions from the Board
- Board Discussion and Deliberation

Each Board member respects the right of other Board member to vote in the minority position. If so doing, each Board member agrees, as a courtesy to the team, to explain the reason for their minority vote, either during deliberation or after casting the vote.

The Board wishes to maintain a culture of professionalism, stay focused, and respect the need of Board members to be available to their families:

- Cell phones will be set for ‘silent’ or vibrate.
- If necessary to check cell phones, Board members will be discreet.

The Board's Role in Collective Bargaining

Board members will be actively involved in the collective bargaining process to ensure that the District is represented well by those selected to negotiate on behalf of the Board and the Community. The involvement of the Board will be to:

- Ensure that the ethical, fiscal and educational goals of the Community are represented in the actions taken throughout the collective bargaining process;
- Participate by providing direction and guidance to those selected to represent the Board (District Negotiation Team);
- Annually, the Board shall determine membership of the District's Negotiation teams. Establish the bargaining approach to be utilized by its negotiation team;
- Set the District's collective bargaining parameters for its negotiation team;
- Expect, as the representative of the Board, that the Superintendent will ensure that the Board, collectively and individually, is informed on the issues and strategies implemented within the collective bargaining process; and,
- The Superintendent or designee shall be the Collective Bargaining spokesperson for the Board to the community and the media.

The Board's Relationship with the Superintendent

The Board will commit to work through and with the Superintendent on issues regarding the running of the District. The Superintendent will inform the Board as soon as possible of:

- notable achievements
- serious safety concerns
- serious disciplinary action
- serious / unexpected personnel changes or disciplinary issues
- serious illness or death of a student, a staff member, or members of a staff member's immediate family
- legal or liability concerns
- serious issues involving school property

In all matters, the Board and Superintendent are expected to protect confidential information.

It is the Superintendent's responsibility to organize the staff in the manner that best serves the needs of the District. As a professional courtesy, the Superintendent shall provide appropriate notice to the Board in advance of action being taken.

The Board's Relationship with the Superintendent continued

As the norm, the Superintendent speaks on behalf of the District. The Board President is authorized to speak on behalf of the Board, when necessary.

The Superintendent will inform the Board when media contacts the Superintendent.

All conflicts between the Superintendent and the Board will be handled in Executive Session, with the Superintendent being in attendance, when appropriate and necessary.

Conflicts between individual Board members and/or the Superintendent will be addressed privately between those who hold the conflict and will not involve other members of the team.

The Board commits to complete an annual evaluation of the Superintendent. The Board will set aside at least one special meeting in January for the purpose of completing the annual evaluation of the Superintendent. In consultation with the Superintendent, the evaluation process and associated documents will be developed and approved by the Board, not later than the first Board meeting in September. The evaluation process and instrument is designed to bring about the collective view of the Board. Thus, the evaluation will reflect the majority view of the Board, as a whole.

The Ongoing Implementation of Board Approved Protocols

Within 90 days of the election/appointment of a new Board member or appointment of a new Superintendent, a Study Session of the whole Board will be held for the purpose of reviewing/updating the governance protocols of the Board.

Upon the request of two or more Board members, a special study session will be called for the purpose of reviewing/updating of the governance operations of the Board.

Lowell School District

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

Board of Director's Meeting

November 24, 2014

Professional Development Center

6:00 pm – Study Session; Executive Session to follow

7:00 pm - Public Session

MINUTES

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

1.0 OPENING BUSINESS—6:00 pm Professional Development Center

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

2.0 STUDY SESSION

- 2.1 Strategic Plan—Presented by Dr. Hanline (Attachment)
 - Obj. 1 Fiscal Integrity and Accountability
 - Set up Reserves for Equipment, SPED and Maintenance and Repair
 - Investigate Tax Initiative
 - Obj. 2 Monthly facility reports
 - Master Facility Plan
 - Survey on Custodial Services
 - Crisis Response Training and Lead
 - Obj. 4 Community Business Partnerships Established (Johnnie)
 - Obj. 13 Develop a List of Comparable Districts for Salary and Health Comparisons
 - Obj. 17 Master Equipment Plan
 - Obj. 18 Develop Graduation Participation Criteria
 - Obj. 19 Update Job Descriptions
- 2.2 Food Service Project—Dr. Hanline—Possible change for driveway and bus access
- 2.3 Convene to Executive Session

3.0 EXECUTIVE SESSION—Superintendent's Office Conference Room

- 3.1 Pursuant to ORS 192.660(2)(i)
 - To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing.
 - 3.1.1 Discussion of Superintendent's Annual Objectives and Evaluation Process
- 3.2 Pursuant to ORS 192.660 (2) (d).

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

3.3 Pursuant to ORS 192.660 (2)(f)

To consider records exempt by law from public inspection.

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

3.4 Return to Public Session

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

4.1 Public Session Call to Order

4.2 Pledge of Allegiance

4.2.1 Led by Chairman of the Board—Mr. McCallum

4.3 Attendance:

AB Dennis McCallum, Chair

___ Suzanne Kintzley, Vice-Chair

___ Mike Galvin

AB Leslie Brandt

___ Jim Chapman

___ Walt Hanline, Ed. D., Superintendent

___ Kay Graham, Principal

___ Marisa Owsley, Student Body Representative

___ Michelle Stephens, Assistant to the Superintendent

4.4 Approval of Agenda – November 24, 2014

Recommended Action: Approval of Agenda

MOTION: Jim Chapman 2nd: Mike Galvin AYES: 3 NOES: 0 ABSTAIN: 0

5.0 COMMUNITY/SCHOOL PRESENTATIONS

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

6.0 PUBLIC COMMENT

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

7.0 CONSENT AGENDA—consolidated motion

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

- 7.1 Board Minutes from October 27, 2014 Board Meeting (Attachment)
7.2 Ratification of Employment (Attachment)
7.3 Check Register: (Attachment)
7.4 Approval of OSBA Policies BBFA, BBFB, EEACA, GBC-R,GBN_JBA, GBNA, GBNA-R, IIA, IK, IKA, IKAB, ING-R, JFCEB, JGAB, LBE
MOTION: Jim Chapman 2nd: Mike Galvin AYES: 3 NOES: 0 ABSTAIN: 0

8.0 ACTION DISCUSSION

- 8.1 Approve Senior Class Trip—Presented by Sr. Class Representatives
Representatives were not able to attend. This item will be moved to the December meeting.
- 8.2 Approve the Board Policy Adoption Process—Presented by Dr. Hanline (Attachment)
MOTION: Mike Galvin 2nd: Suzanne Kintzley AYES: 3 NOES: 0 ABSTAIN: 0
- 8.3 Approve OASB Board Policies GBC, GCAB, JFCEB
MOTION: Suzanne Kintzley 2nd: Jim Chapman AYES: 3 NOES: 0 ABSTAIN: 0
- 8.4 Approve the Lowell-Fall Creek Education Foundation by laws—Presented by Dr. Hanline (Attachment)
Recommendation is to approve the foundation by laws; the Lowell School District (Board) will be responsible for appointing the Board of Directors (2.11) and the Lowell School District (Staff) will be responsible for paperwork, minutes, communication, etc. (3.10)
MOTION: Jim Chapman 2nd: Suzanne Kintzley AYES: 3 NOES: 0 ABSTAIN: 0
- 8.5 Approve the Lowell-Fall Creek Foundation Board Members—Presented by Dr. Hanline;
Information will be provided at the Board Meeting
MOTION: Jim Chapman 2nd: Mike Galvin AYES: 3 NOES: 0 ABSTAIN: 0
- 8.6 Approve Purchasing and Financing of Chrome books for all students—Presented by Dr. Hanline
Direction of project was discussed and there is no vote at this time.
- 8.7 Approve Resolution 2014-15-4 for financing of Chrome Books; not to exceed \$150,000—
Presented by Dr. Hanline (Resolution document will be available at the Board Meeting for review)
No vote due to the results of the results of item 8.6
- 8.8 Approval of 2014-15 Lowell School Board Calendar—Presented by Dr. Hanline (Attachment)
MOTION: Jim Chapman 2nd: Suzanne Kintzley AYES: 3 NOES: 0 ABSTAIN: 0
- 8.9 Approval of 2015-16 Lowell School Board Calendar—Presented by Dr. Hanline (Attachment)
MOTION: Jim Chapman 2nd: Mike Galvin AYES: 3 NOES: 0 ABSTAIN: 0

- 8.10 Approval of 2015-16 Lowell School District Calendar—Presented by Dr. Hanline (Attachment)

MOTION: Jim Chapman 2nd: Mike Galvin AYES: 3 NOES: 0 ABSTAIN: 0

- 8.11 Approve OSBA Resolution 1—Referred by OSBA (Attachment)

MOTION: Jim Chapman 2nd: Suzanne Kintzley AYES: 3 NOES: 0 ABSTAIN: 0

- 8.12 Approve OSBA Resolution 2—Referred by OSBA (Attachment)

MOTION: Jim Chapman 2nd: Suzanne Kintzley AYES: 3 NOES: 0 ABSTAIN: 0

- 8.13 Approve OSBA Resolution 3—Referred by OSBA (Attachment)

MOTION: Jim Chapman 2nd: Suzanne Kintzley AYES: 3 NOES: 0 ABSTAIN: 0

9.0 INFORMATION AND STUDY

- 9.1 1st reading of OSBA policy updates—presented by Dr. Hanline (Attachment)

- 9.2 OSBA Conference Report and Feedback—Presented by Attendees; Referred by Dr. Hanline

This item will be brought back at the next meeting when all board members will be present

- 9.3 Utility Report—Referred by Ms. Weathers (Attachment)

- 9.4 Financial Report—Referred by Mr. Standridge (Attachment)

- 9.5 Student Body Representative Report—Presented by Ms. Owsley

- 9.6 Principals Report—Presented by Ms. Graham

- 9.7 Superintendent's Report—Presented by Dr. Hanline

- 9.8 Board Members' Report

10.0 ADJOURNMENT

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

SUNGARD PENTAMATION
DATE: 12/09/2014
TIME: 10:22:18

LOWELL SCHOOL DISTRICT #71
CHECK REGISTER - BY FUND

PAGE NUMBER: 1
ACCTPA21

SELECTION CRITERIA: transact.ck_date between '11/01/2014' and '11/30/2014'
ACCOUNTING PERIOD: 6/15

FUND - 100 - GENERAL FUND

CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT
A101	26324	11/04/14	1626 LOWELL SCHOOL DISTR	100	A103	HS OFFICE PETTY CAS	0.00	500.00
A101	26325	11/05/14	2403 BRIAN BEARD	1001131000180000	420	MATH TEXTBOOK	0.00	17.53
A101	26326	11/05/14	2102 CAMFIL USA, INC	1002542000000000	410	BLDG AIR FILTERS	0.00	370.49
A101	26327	11/05/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	13.62
A101	26327	11/05/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	7.59
A101	26327	11/05/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	110.92
A101	26327	11/05/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	RETURN CREDIT	0.00	-44.78
A101	26327	11/05/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	202.26
TOTAL CHECK							0.00	289.61
A101	26328	11/05/14	2161 CHRIS ELLISON	1002552000000000	640	DRIVER TRAINING	0.00	147.00
A101	26329	11/05/14	1040 CITY OF LOWELL	1002554000000000	327	OCT WATER/SEWER	0.00	97.00
A101	26329	11/05/14	1040 CITY OF LOWELL	1002542000000000	327	OCT WATER/SEWER	0.00	643.25
TOTAL CHECK							0.00	740.25
A101	26330	11/05/14	1259 COASTWIDE LABORATOR	1002542000000000	410	CUSTODIAL SUPPLIES	0.00	5.58
A101	26330	11/05/14	1259 COASTWIDE LABORATOR	1002554000000000	410	CUSTODIAL SUPPLIES	0.00	42.84
TOTAL CHECK							0.00	48.42
A101	26332	11/05/14	2299 JAMES HEATING	1002542000000000	322	AIR FILTER CLEANING	0.00	190.00
A101	26334	11/05/14	1070 JERRY BROWN COMPANY	1002554000000000	411	VEHICLE FUEL	0.00	1,691.57
A101	26335	11/05/14	1071 JERRY'S BUILDING MA	1001131000550000	410	WOODSHOP SUPPLIES	0.00	27.74
A101	26335	11/05/14	1071 JERRY'S BUILDING MA	1002543000000000	410	WOODSHOP SUPPLIES	0.00	27.74
A101	26335	11/05/14	1071 JERRY'S BUILDING MA	1001131000550000	410	WOODSHOP MAINT	0.00	36.44
A101	26335	11/05/14	1071 JERRY'S BUILDING MA	1001131000550000	460	WOODSHOP DRILL	0.00	68.99
A101	26335	11/05/14	1071 JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINT	0.00	96.46
A101	26335	11/05/14	1071 JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINT	0.00	15.34
A101	26335	11/05/14	1071 JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINT	0.00	100.00
TOTAL CHECK							0.00	344.97
A101	26336	11/05/14	2105 JOHNNIE MATTHEWS	1002240000000000	312	PROF DEV MATTHEWS	0.00	600.00
A101	26337	11/05/14	1074 JOHNSTONE SUPPLY	1002542000000000	410	BOILER FILTERS	0.00	7.35
A101	26339	11/05/14	2354 KLERITEC	1002542000000000	410	CUSTODIAL SUPPLIES	0.00	997.38
A101	26341	11/05/14	1334 LANE COMMUNITY COLL	1002574000000000	355	PRINT 'THE BRIDGE'	0.00	267.70
A101	26342	11/05/14	1644 LANE ELECTRIC COOPE	1002554000000000	325	SEP/OCT ELECTRICITY	0.00	131.46
A101	26342	11/05/14	1644 LANE ELECTRIC COOPE	1002542000000000	325	SEP/OCT ELECTRICITY	0.00	1,913.89
TOTAL CHECK							0.00	2,045.35
A101	26343	11/05/14	1789 OREGON DEPARTMENT O	1002410000000000	640	BACKGROUND CHECK	0.00	5.00
A101	26344	11/05/14	1548 PACIFIC WINDS MUSIC	1001131000133000	410	MUSIC SUPPLIES	0.00	93.95
A101	26344	11/05/14	1548 PACIFIC WINDS MUSIC	1001131000133000	410	TROMBONE	0.00	82.55
TOTAL CHECK							0.00	172.50

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT
A101	26345	11/05/14	1222 PLATT ELECTRIC SUPP	1002542000000000	410	BLDG MAINT	0.00	14.36
A101	26346	11/05/14	1239 SECURITY ALARM CORP	1002542000000000	329	ELEM ALARM SVC	0.00	49.75
A101	26346	11/05/14	1239 SECURITY ALARM CORP	1002542000000000	329	HS ALARM SVC	0.00	60.75
TOTAL CHECK							0.00	110.50
A101	26347	11/05/14	2370 SHERWIN-WILLIAMS	1002542000000000	410	PAINTING SUPPLIES	0.00	159.10
A101	26350	11/05/14	2301 WALT HANLINE	1002321000000000	340	BUSINESS MTG MEAL	0.00	35.34
A101	26350	11/05/14	2301 WALT HANLINE	1002321000000000	410	PRINTER INK CARTRID	0.00	241.96
A101	26350	11/05/14	2301 WALT HANLINE	1001111000000000	410	CLASSROOM SUPPLIES	0.00	164.59
A101	26350	11/05/14	2301 WALT HANLINE	1002310000000000	410	BOARD MTG BEVERAGES	0.00	37.06
TOTAL CHECK							0.00	478.95
A101	26351	11/12/14	2329 CDW GOVERNMENT	1001131000050000	480	CHROMEBOOK LICENSES	0.00	180.00
A101	26353	11/12/14	2353 FUELEDUCATION	1001131000210000	319	ONLINE INSTRUCTION	0.00	3,887.00
A101	26353	11/12/14	2353 FUELEDUCATION	1001131000180000	319	ONLINE INSTRUCTION	0.00	1,196.00
A101	26353	11/12/14	2353 FUELEDUCATION	1001131000120000	319	ONLINE INSTRUCTION	0.00	299.00
A101	26353	11/12/14	2353 FUELEDUCATION	1001131000050000	319	ONLINE INSTRUCTION	0.00	2,000.00
TOTAL CHECK							0.00	7,382.00
A101	26354	11/12/14	2418 HEATHER WOODHURST	1001210000000000	460	TAG SUPPLY CABINET	0.00	79.99
A101	26355	11/12/14	1914 HEYMAN'S SAFE, LOCK	1002542000000000	410	KEYS	0.00	33.60
A101	26355	11/12/14	1914 HEYMAN'S SAFE, LOCK	1002542000000000	410	KEYS/SUPPLIES	0.00	36.60
TOTAL CHECK							0.00	70.20
A101	26356	11/12/14	1071 JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINT	0.00	122.82
A101	26356	11/12/14	1071 JERRY'S BUILDING MA	1001131000550000	410	WASTE CANS	0.00	59.94
TOTAL CHECK							0.00	182.76
A101	26357	11/12/14	2317 LANE FOREST PRODUCT	1002542000000000	328	DUMP FEE	0.00	6.00
A101	26359	11/12/14	1202 OETC	1001111000000000	480	CHROMEBOOK CARTS	0.00	1,395.83
A101	26359	11/12/14	1202 OETC	1001131000050000	480	SERVER UPGRADE	0.00	20.00
A101	26359	11/12/14	1202 OETC	1001131000050000	480	CHROMEBOOK CARTS	0.00	1,395.83
TOTAL CHECK							0.00	2,811.66
A101	26360	11/12/14	2370 SHERWIN-WILLIAMS	1002542000000000	410	PAINTING SUPPLIES	0.00	57.41
A101	26364	11/19/14	1230 CENTURY LINK	1002542000000000	351	NOV TELEPHONE SVC	0.00	308.33
A101	26365	11/19/14	2263 ANTHONY NOLAN	1002542000000000	410	BLDG MAINT SUPPLIES	0.00	99.87
A101	26366	11/19/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	19.20
A101	26366	11/19/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	8.96
A101	26366	11/19/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	15.72
A101	26366	11/19/14	1032 CARQUEST AUTO PARTS	1002554000000000	410	FUEL CANS	0.00	35.98
TOTAL CHECK							0.00	79.86

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCT	DESCRIPTION	SALES TAX	AMOUNT
A101	26367	11/19/14 2329	CDW GOVERNMENT	1001131000050000	480	CHROMEBOOK COMPUTER	0.00	1,513.26
A101	26368	11/19/14 2233	COLLETTE ULLRICH	1002130000000000	640	CPR TRAINING	0.00	20.00
A101	26369	11/19/14 2127	DEBI MCNAMARA	1002520000000000	340	CONFERENCE TRAVEL	0.00	94.46
A101	26370	11/19/14 2419	E3 DIAGNOSTICS	1002130000000000	322	BELTONE CALIBRATION	0.00	68.00
A101	26371	11/19/14 1066	HUNGERFORD LAW FIRM	1002310000000000	382	OCT LEGAL SVCS	0.00	293.75
A101	26372	11/19/14 2315	INNOVATIVE AIR INC.	1002542000000000	322	PLUMBING REPAIRS	0.00	2,132.00
A101	26373	11/19/14 2042	JEFF WEST	1002130000000000	640	CPR/FIRST AID CLASS	0.00	175.00
A101	26374	11/19/14 1070	JERRY BROWN COMPANY	1002554000000000	410	DIESEL FLUID	0.00	145.75
A101	26375	11/19/14 1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINTENANCE	0.00	32.69
A101	26375	11/19/14 1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINTENANCE	0.00	73.47
TOTAL CHECK							0.00	106.16
A101	26376	11/19/14 1755	JUDY HAMPTON	1002120000000000	319	OCT GUIDANCE SVCS	0.00	202.50
A101	26377	11/19/14 2226	KANDAYCE DAY	1002410000000000	340	SECC TRAINING - DAY	0.00	253.57
A101	26378	11/19/14 2085	KAREN CARDWELL	1002222000000000	410	BOOK TAPE	0.00	32.43
A101	26381	11/19/14 2420	OREGON LIONS SIGHT	1002130000000000	390	VISION SCREENING	0.00	100.00
A101	26382	11/19/14 1211	OSBA	1002310000000000	640	POLICY PLUS NOV FEE	0.00	50.00
A101	26383	11/19/14 2126	PACIFIC OFFICE AUTO	1002520000000000	322	PRINTER REPAIR	0.00	160.00
A101	26383	11/19/14 2126	PACIFIC OFFICE AUTO	1002520000000000	410	PRINTER SUPPLIES	0.00	250.00
TOTAL CHECK							0.00	410.00
A101	26385	11/19/14 2345	PAULSEN ENVIRONMENT	1002542000000000	640	ASBESTOS INSPECTION	0.00	1,200.00
A101	26386	11/19/14 1227	PSAT/NMSQT	1002230000000000	410	PSAT TESTS	0.00	42.00
A101	26387	11/19/14 2015	RANDY DOAN	1002542000000000	410	BLDG MAINTENANCE	0.00	18.06
A101	26388	11/19/14 2422	ROBERTS SUPPLY	1002543000000000	410	LEAF BLOWER	0.00	413.95
A101	26389	11/19/14 2167	SANIPAC	1002542000000000	328	LUNDY GARBAGE OCT	0.00	259.30
A101	26389	11/19/14 2167	SANIPAC	1002542000000000	328	HS GARBAGE OCT	0.00	275.60
TOTAL CHECK							0.00	534.90
A101	26391	11/19/14 2423	TRIPLE J&S SIGNS	1002542000000000	410	WELCOME SIGNS	0.00	70.00
A101	26393	11/19/14 1166	VERIZON	1002542000000000	351	BOWERS TELEPHONE	0.00	358.81
A101	26394	11/19/14 1623	WILLAMETTE BSD	1002321000000000	470	PENTAMATION NOV	0.00	518.44

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CASH ACCT	CHECK NO	ISSUE DT	VENDOR	BUDGET CODE	ACCNT	DESCRIPTION	SALES TAX	AMOUNT
A101	26395	11/19/14	2301 WALT HANLINE	1002321000000000	340	OSBA CONF TRAVEL	0.00	1,021.77
A101	26396	11/19/14	1002 AFLAC	100	L472.125	DED:8010 AFLAC ACDN	0.00	65.39
A101	26396	11/19/14	1002 AFLAC	100	L472.125	DED:8017 AFLAC DSBL	0.00	23.40
A101	26396	11/19/14	1002 AFLAC	100	L472.125	DED:8011 AFLAC STD	0.00	42.43
A101	26396	11/19/14	1002 AFLAC	100	L472.125	DED:8108 AFLAC CNCR	0.00	168.01
A101	26396	11/19/14	1002 AFLAC	100	L472.125	DED:8106 AFLAC P/A	0.00	144.98
TOTAL CHECK							0.00	444.21
A101	26397	11/19/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7309 A/F CANCER	0.00	53.90
A101	26397	11/19/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7299 CANCER A/T	0.00	6.00
A101	26397	11/19/14	1701 AMERICAN FIDELITY A	100	L472.734	DED:7304 125 ACIDNT	0.00	41.90
A101	26397	11/19/14	1701 AMERICAN FIDELITY A	100	L472.734	DED:7310 A/F ACCIDE	0.00	33.40
A101	26397	11/19/14	1701 AMERICAN FIDELITY A	100	L472.730	DED:7300 A/F-DSBLTY	0.00	114.90
A101	26397	11/19/14	1701 AMERICAN FIDELITY A	100	L472.730	DED:7308 A.F. LIFE	0.00	179.00
A101	26397	11/19/14	1701 AMERICAN FIDELITY A	100	L472.731	DED:7301 A/F-CANCER	0.00	61.20
TOTAL CHECK							0.00	490.30
A101	26398	11/19/14	1795 AMERICAN FIDELITY A	100	L472.076	DED:7111 TSA AM/FID	0.00	580.69
A101	26398	11/19/14	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	26399	11/19/14	1710 AMERICAN FIDELITY A	100	L472.732	DED:7302 UNREMB MED	0.00	282.00
A101	26400 V	11/19/14	2321 AMERICAN FIDELITY H	100	L472.735	DED:7298 AM/FID HSA	0.00	-2,197.95
A101	26400	11/19/14	2321 AMERICAN FIDELITY H	100	L472.735	DED:7298 AM/FID HSA	0.00	2,197.95
TOTAL CHECK							0.00	0.00
A101	26401	11/19/14	1063 LOWELL S.D. SCHOLAR	100	L472.420	DED:8103 L. SCHOLAR	0.00	70.00
A101	26402	11/19/14	1206 OREGON DEPARTMENT O	100	L472.099	DED:0099 OR.DEPT.RV	0.00	372.67
A101	26403	11/19/14	1051 OREGON EDUCATION AS	100	L472.012	DED:8200 OEA	0.00	1,241.67
A101	26404	11/19/14	1052 OREGON SCHOOL EMPLO	100	L472.013	DED:8202 OSEA	0.00	524.40
A101	26405	11/19/14	1939 OSEA CHAPTER 118	100	L472.118	DED:8118 OSEA 118	0.00	9.50
A101	26406	11/19/14	2183 LEGAL SHIELD	100	L472.740	DED:7350 PP LEGAL	0.00	93.65
A101	26407	11/19/14	2342 TEXAS LIFE	100	L472.736	DED:7607 TEXAS LIFE	0.00	56.50
A101	26407	11/19/14	2342 TEXAS LIFE	100	L472.736	DED:7606 TEXAS LIFE	0.00	48.00
TOTAL CHECK							0.00	104.50
A101	26408	11/19/14	2321 AMERICAN FIDELITY H	100	L472.735	AM/FID HSA	0.00	1,681.29
A101	26409	11/20/14	2403 BRIAN BEARD	1001131000550000	410	WOODSHOP SUPPLIES	0.00	306.48
A101	26409	11/20/14	2403 BRIAN BEARD	1001131000120000	410	SCIENCE DEPT SUPPLI	0.00	21.09
A101	26409	11/20/14	2403 BRIAN BEARD	1001121000550000	410	EXPLORATION CLASS S	0.00	18.36
A101	26409	11/20/14	2403 BRIAN BEARD	1002542000000000	410	BLDG REPAIR	0.00	11.78
A101	26409	11/20/14	2403 BRIAN BEARD	1001131000550000	410	SHOP SUPPLIES	0.00	11.96
TOTAL CHECK							0.00	762.67

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A101	26410	11/20/14	2324	L D ELLISON	1002554000000000	340	TRANS. MTG LUNCH	0.00	26.76
A101	26410	11/20/14	2324	L D ELLISON	1002554000000000	410	PBIS CERTIFICATE	0.00	5.00
TOTAL CHECK							0.00	31.76	
A101	26411	11/20/14	1789	OREGON DEPARTMENT O	1002410000000000	640	BACKGROUND CHECK	0.00	5.00
A101	26413	11/25/14	2149	CENTURY LINK-LONG D	1002542000000000	351	TELEPHONE SERVICE	0.00	17.73
A101	26414	11/25/14	1031	CAROLINA BIOLOGICAL	1001131000120000	410	SCIENCE SUPPLIES	0.00	56.70
A101	26415	11/25/14	1032	CARQUEST AUTO PARTS	1002554000000000	410	VEHICLE PARTS	0.00	114.58
A101	26416	11/25/14	2424	COMPVIEW INC.	1001131000050000	480	PROJECTOR LAMP	0.00	191.00
A101	26417	11/25/14	2186	DE LAGE LANDEN PUBL	1002574000000000	355	COPIER SERVICE	0.00	710.53
A101	26419	11/25/14	1750	I5-GLASS COMPANY	1002542000000000	410	2 GLASS SHEETS	0.00	156.00
A101	26419	11/25/14	1750	I5-GLASS COMPANY	1002542000000000	410	CLEAR GLASS SHEET	0.00	21.00
TOTAL CHECK							0.00	177.00	
A101	26420	11/25/14	1070	JERRY BROWN COMPANY	1002554000000000	410	VEHICLE FUEL	0.00	1,005.78
A101	26421	11/25/14	1071	JERRY'S BUILDING MA	1002554000000000	410	MAINT SUPPLIES	0.00	39.93
A101	26421	11/25/14	1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINT SUPPLIES	0.00	31.94
A101	26421	11/25/14	1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINT SUPPLIES	0.00	126.28
A101	26421	11/25/14	1071	JERRY'S BUILDING MA	1002542000000000	410	BLDG MAINT SUPPLIES	0.00	96.25
TOTAL CHECK							0.00	294.40	
A101	26422	11/25/14	2303	JIM CHAPMAN	1002310000000000	340	OSBA CONF TRAVEL	0.00	146.72
A101	26425	11/25/14	2311	MICHELLE STEPHENS	1002310000000000	410	BOARD MTG SUPPLIES	0.00	14.70
A101	26425	11/25/14	2311	MICHELLE STEPHENS	1002310000000000	410	BOARD MTG SUPPLIES	0.00	11.15
A101	26425	11/25/14	2311	MICHELLE STEPHENS	1002310000000000	382	MAILING TO ATTY	0.00	24.77
TOTAL CHECK							0.00	50.62	
A101	26426	11/25/14	2398	MOUNTAIN VIEW ACADE	1001288000000000	360	NOV MVA PAYMENT	0.00	41,871.00
A101	26427	11/25/14	1548	PACIFIC WINDS MUSIC	1001131000133000	410	MUSIC CLASS SUPPLIE	0.00	46.90
A101	26427	11/25/14	1548	PACIFIC WINDS MUSIC	1001131000133000	460	SAXOPHONE MOUTHPIEC	0.00	77.95
TOTAL CHECK							0.00	124.85	
A101	26428	11/25/14	1225	POSTMASTER	1002574000000000	353	THE BRIDGE POSTAGE	0.00	177.53
A101	26431	11/25/14	1166	VERIZON	1002542000000000	351	BLDG MAINT TELEPHON	0.00	70.84
A101	26431	11/25/14	1166	VERIZON	1002554000000000	351	BUS CELL PHONES	0.00	64.13
TOTAL CHECK							0.00	134.97	
A101	26432	11/25/14	2301	WALT HANLINE	1002321000000000	340	BUSINESS MTG MEAL	0.00	28.66
A101	26433	11/25/14	1170	WESTERN BUS SALES	1002554000000000	410	VEHICLE PARTS	0.00	160.64

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CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCT	----DESCRIPTION----	SALES TAX	AMOUNT
TOTAL CASH ACCOUNT							0.00	83,048.94
TOTAL FUND							0.00	83,048.94

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FUND - 241 - SPR&I 14-15

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	-----DESCRIPTION----	SALES TAX	AMOUNT
A101	26331	11/05/14	1138 COSA	2412240000000000	340	CONF REGISTR HANSEN	0.00	294.00
TOTAL CASH ACCOUNT							0.00	294.00
TOTAL FUND							0.00	294.00

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FUND - 260 - YTP

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26333	11/05/14	1263 JEF JALOF	2602129000000000	410	GARDEN SUPPLIES	0.00	42.50
TOTAL CASH ACCOUNT							0.00	42.50
TOTAL FUND							0.00	42.50

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FUND - 277 - EBISS DEPTH 13-14

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26338	11/05/14	2310 KAY GRAHAM	2772120000000000	410	INCENTIVE PRIZES	0.00	64.67
TOTAL CASH ACCOUNT							0.00	64.67
TOTAL FUND							0.00	64.67

SUNGARD PENTAMATION
DATE: 12/09/2014
TIME: 10:22:18

LOWELL SCHOOL DISTRICT #71
CHECK REGISTER - BY FUND

PAGE NUMBER: 10
ACCTPA21

SELECTION CRITERIA: transact.ck_date between '11/01/2014' and '11/30/2014'
ACCOUNTING PERIOD: 6/15

FUND - 295 - ATHLETICS & ACTIVITIES

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	----DESCRIPTION----	SALES TAX	AMOUNT
A101	26322	11/04/14 2326	COMFORT SUITES	2951132000000720	340	VB TO STATE LODGING	0.00	990.00
A101	26323	11/04/14 1626	LOWELL SCHOOL DISTR	2951132000000720	340	VB TRAVEL TO STATE	0.00	768.00
A101	26358	11/12/14 1197	O S A A	2951132000000720	640	VB STATE PLAYOFF	0.00	886.00
A101	26362	11/12/14 2417	YONCALLA HIGH SCHOO	2951132000000735	640	BX TOURNEY FEE	0.00	150.00
A101	26362	11/12/14 2417	YONCALLA HIGH SCHOO	2951132000000730	640	BX TOURNEY FEE	0.00	150.00
TOTAL CHECK							0.00	300.00
A101	26380	11/19/14 1197	O S A A	2951132000000710	640	11/15 FB PLAYOFF GA	0.00	1,432.00
A101	26380	11/19/14 1197	O S A A	2951132000000710	640	11/7 FB PLAYOFF GAT	0.00	1,197.05
TOTAL CHECK							0.00	2,629.05
A101	26418	11/25/14 1124	EMERALD EMPIRE VB O	2951132000000720	380	VOLLEYBALL OFFICIAL	0.00	357.50
A101	26418	11/25/14 1124	EMERALD EMPIRE VB O	2951132000000720	380	VOLLEYBALL OFFICIAL	0.00	-125.00
A101	26418	11/25/14 1124	EMERALD EMPIRE VB O	2951132000000720	380	VOLLEYBALL OFFICIAL	0.00	57.00
TOTAL CHECK							0.00	289.50
A101	26423	11/25/14 1084	LANE COUNTY FOOTBAL	2951132000000710	380	FOOTBALL OFFICIALS	0.00	1,121.82
A101	26424	11/25/14 2133	MICHAEL NEET	2951132000000730	640	FINGERPRINTING FEE	0.00	15.00
TOTAL CASH ACCOUNT							0.00	6,999.37
TOTAL FUND							0.00	6,999.37

SUNGARD PENTAMATION
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TIME: 10:22:18

LOWELL SCHOOL DISTRICT #71
CHECK REGISTER - BY FUND

PAGE NUMBER: 11
ACCTPA21

SELECTION CRITERIA: transact.ck_date between '11/01/2014' and '11/30/2014'
ACCOUNTING PERIOD: 6/15

FUND - 297 - FOOD SERVICE FUND

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCT	-----DESCRIPTION----	SALES TAX	AMOUNT
A101	26348	11/05/14	1776	SYS CO FOOD SERVICES	2973100000000000 450	FOOD SUPPLIES	0.00	1,284.24
A101	26348	11/05/14	1776	SYS CO FOOD SERVICES	2973100000000000 450	FOOD SUPPLIES	0.00	983.50
TOTAL CHECK							0.00	2,267.74
A101	26349	11/05/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD SUPPLIES	0.00	162.99
A101	26349	11/05/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD SUPPLIES	0.00	72.30
A101	26349	11/05/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD SUPPLIES	0.00	324.45
TOTAL CHECK							0.00	559.74
A101	26352	11/12/14	2291	EARTH20	2973100000000000 450	BOTTLED WATER	0.00	28.95
A101	26361	11/12/14	1776	SYS CO FOOD SERVICES	2973100000000000 450	FOOD SUPPLIES	0.00	799.84
A101	26361	11/12/14	1776	SYS CO FOOD SERVICES	2973100000000000 450	FOOD SUPPLIES	0.00	1,114.86
TOTAL CHECK							0.00	1,914.70
A101	26390	11/19/14	1776	SYS CO FOOD SERVICES	2973100000000000 450	FOOD SUPPLIES	0.00	956.79
A101	26390	11/19/14	1776	SYS CO FOOD SERVICES	2973100000000000 450	FOOD CREDIT	0.00	-50.61
TOTAL CHECK							0.00	906.18
A101	26392	11/19/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD SUPPLIES	0.00	263.60
A101	26392	11/19/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD SUPPLIES	0.00	144.60
TOTAL CHECK							0.00	408.20
A101	26429	11/25/14	1776	SYS CO FOOD SERVICES	2973100000000000 450	FOOD SUPPLIES	0.00	817.35
A101	26430	11/25/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD CREDIT	0.00	-129.03
A101	26430	11/25/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD SUPPLIES	0.00	349.25
A101	26430	11/25/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD CREDIT	0.00	-66.68
A101	26430	11/25/14	2193	UMPQUA DAIRY	2973100000000000 450	FOOD SUPPLIES	0.00	145.05
TOTAL CHECK							0.00	298.59
TOTAL CASH ACCOUNT							0.00	7,201.45
TOTAL FUND							0.00	7,201.45

SUNGARD PENTAMATION
DATE: 12/09/2014
TIME: 10:22:18

LOWELL SCHOOL DISTRICT #71
CHECK REGISTER - BY FUND

PAGE NUMBER: 12
ACCTPA21

SELECTION CRITERIA: transact.ck_date between '11/01/2014' and '11/30/2014'
ACCOUNTING PERIOD: 6/15

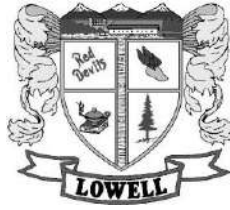
FUND - 400 - CAPITAL PROJECTS

CASH ACCT	CHECK NO	ISSUE DT	-----VENDOR-----	BUDGET CODE	ACCNT	-----DESCRIPTION-----	SALES TAX	AMOUNT
A101	26340	11/05/14	2416 L & L FOUNDATIONS,	4002540000000650	590	ANNOUNCER'S BOOTH	0.00	4,950.00
A101	26363	11/12/14	2385 THE CARPET COMPANY	4002540002000610	590	FINAL LUNDY CARPET	0.00	10,957.00
A101	26379	11/19/14	2416 L & L FOUNDATIONS,	4002540000000650	590	ANNOUNCER'S BOOTH	0.00	1,049.00
A101	26384	11/19/14	2421 PAINT THE TOWN, LLC	4002540002000602	590	LUNDY INTERIOR PAIN	0.00	2,295.00
A101	26384	11/19/14	2421 PAINT THE TOWN, LLC	4002540002000602	590	LUNDY EXTERIOR PAIN	0.00	3,700.00
TOTAL CHECK							0.00	5,995.00
A101	26412	11/20/14	2421 PAINT THE TOWN, LLC	4002540000000000	322	HS INT/EXT PAINTING	0.00	4,650.00
TOTAL CASH ACCOUNT							0.00	27,601.00
TOTAL FUND							0.00	27,601.00
TOTAL REPORT							0.00	125,251.93

LANE COUNTY SCHOOL DISTRICT 71

Lowell/Fall Creek

www.lowell.k12.or.us



OPEN ENROLLMENT TRANSFER REQUEST

If you wish to enroll your student in one of the educational options provided to parents and students within Lowell School District, please complete the following form and give to the principal of the school your child plans to attend. The Board of Trustees has acted, on December 15, 2014, to accept all students who wish to attend Lowell School District Schools.

Please note (with a check mark) the school you wish your child to attend:

Lundy Elementary School (Grades Kindergarten – 6th Grade) _____

Mountain View Academy (Grades Kindergarten – 8th Grade) _____

Lowell Jr./Sr. High School (Grades 7th – 12th Grade) _____

Please complete the following information:

Parent/Guardian Name(s): _____

Legal Resident Address: _____

Mailing Address (if different): _____

Phone Number: _____

Child for which transfer is being requested	2014-2015 Grade	Current School
_____	_____	_____
_____	_____	_____
_____	_____	_____

Present School District of residence: _____

Signature of Parent/Guardian: _____ Date: _____

Please return to the attention of the principal of the school of choice. The principal will contact each parent to discuss the transition of the student into the school of choice.

The Lowell School District is dedicated to educational achievement and the success of every student.

USDA and the Lowell School District are equal opportunity providers and employers. Attachment 7.3

Oregon School Boards Association Selected Sample Policy

Code: **DJC**
Adopted:

Bidding Requirements (Version 2)

The Board declares its intention to purchase competitively without prejudice and to seek maximum educational value for every dollar expended. All public contracts for goods or services shall be based upon applicable competitive procurement provisions of Oregon Revised Statutes and adopted public contracting rules except:

1. Contracts between contracting agencies or between contracting agencies and the federal government;
2. Insurance and services contracts as provided for under state law;
3. Contracts for the procurement or distribution of textbooks;
4. Energy savings performance contracts;
5. Contracts made with qualified nonprofit agencies providing employment opportunities for disabled individuals;
6. Public improvement contracts exempted by the Local Contract Review Board (LCRB) upon findings that the award would not encourage favoritism or substantially diminish competition and would result in substantial cost savings and other substantial benefits to the contracting agency;
7. Special procurements exempted by the LCRB upon findings that the award would not encourage favoritism or substantially diminish competition and would result in substantial cost savings to the contracting agency;
8. Emergency contracts;
9. Any other public contract specifically exempted from the code by another provision or law.

The [Board] will serve as the LCRB for the district. All district purchasing shall be conducted in accordance with the [Board's] adopted rules¹.

The Board acting as its own LCRB adopts² [the *Oregon Attorney General's Model Public Contract Rules* OAR Chapter 137, Divisions 046 through 049,] [its own rules of procedure that will govern district

¹The Board may contract with another public agency to serve as its LCRB.

²Purchases shall be governed by ORS Chapter 279, 279A, 279B and 279C. Additionally, the Board may, as provided by ORS 279, 279A.065, adopt the Oregon Attorney General's Model Public Contract Rules, OAR Chapter 137 governing purchasing/bid procedures. The Board may also adopt the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125. The Board may adopt portions of those rules or adopt its own rules. A Board that creates its own LCRB but has not established its own rules of procedure for public contracts is subject to the model rules (OAR Chapter 137) adopted by the Attorney General.

purchasing. Consequently, the model rules adopted by the Attorney General shall not apply to the district. The district's rules may include portions of the *Oregon Attorney General's Model Public Contract Rules* OAR Chapter 137, Division 046 through 049,] in effect at the time this policy is adopted. These rules govern purchasing procedures, and other matters subject to public contracting provisions of law.

The district shall procure the construction manager/general contractor services in accordance with model rules the Attorney General adopts under ORS 279A.065(3).

Additionally, the Board may include as part of its rules portions of the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125, Divisions 246 through 249 in effect at the time this policy is adopted.

Where necessary, the Board has made the written findings required by law for exemptions from competitive bidding. Such findings shall be maintained by the district and made available on request.

The district shall review its rules each time the Attorney General adopts a modification of the model rules, as required by ORS 279A.065 (5)(b), to determine whether any modifications need to be made to district rules to ensure compliance with statutory changes. [Modifications will be made only following review by the district's legal counsel.] New rules, as necessary, will be adopted by the Board. In the event it is unnecessary to adopt new rules, Board minutes will reflect that the review process was completed as required. The Board recognizes that a public contracting agency that has not established its own rules of procedure as required by ORS 279A.065 (5) is subject to the model rules adopted by the Attorney General, including all modifications to the model rules that the Attorney General may adopt.

Opportunity will be provided to all responsible suppliers to do business with the district. The [business manager] will develop and maintain lists of potential vendors for various types of materials, equipment and supplies. Such lists may be used to develop a mailing list for distribution of specifications and solicitations for bids or proposals. Any supplier may be included in the list upon request.

Procurements estimated to be in excess of \$250,000 shall go through the cost analysis and feasibility process described in ORS 279B.

Records of bids, proposals and specifications will be kept in the district administration office and will conform with Oregon Revised Statutes and applicable records retention provisions of the *Oregon Attorney General's Model Public Contract Rules*.

END OF POLICY

Legal Reference(s):

[ORS Chapters 279A, 279B and 279C](#) [OAR Chapter 125](#), Divisions 246-249

OR. DEP'T OF JUSTICE, OR. ATT'Y GENERAL'S MODEL PUBLIC CONTRACT RULES MANUAL.

Oregon School Boards Association Selected Sample Policy

Code: **EBB**
Adopted:

Integrated Pest Management

To ensure the health and safety concerns of student, staff and community members, the district shall adopt an integrated pest management plan (IPM)¹ which emphasizes the least possible risk to students, staff and community members and shall adopt a list of low-impact pesticides for use with the IPM plan.

The IPM plan is a proactive strategy that:

1. Focuses on the long-term prevention or suppression of pest problems through economically sound measures that:
 - a. Protect the health and safety of students and staff;
 - b. Protect the integrity of district buildings and grounds;
 - c. Maintain a productive learning environment; and
 - d. Protect local ecosystem health.
2. Focuses on the prevention of pest problems by working to reduce or eliminate conditions of property construction, operation and maintenance that promote or allow for the establishment, feeding, breeding and proliferation of pest populations or other conditions that are conducive to pests or that create harborage for pests;
3. Incorporates the use of sanitation, structural remediation or habitat manipulation or of mechanical, biological and chemical pest control measures that present a reduced risk or have a low-impact and, for the purpose of mitigating a declared pest emergency, the application of pesticides that are not low-impact pesticides;
4. Includes regular monitoring and inspections to detect pests, pest damage and unsanctioned pesticide usage;
5. Evaluates the need for pest control by identifying acceptable pest population density levels;
6. Monitors and evaluates the effectiveness of pest control measures;
7. Excludes the application of pesticides on a routine schedule for purely preventive purposes, other than applications of pesticides designed to attract or be consumed by pests;
8. Excludes the application of pesticides for purely aesthetic purposes;
9. Includes school staff education about sanitation, monitoring, inspection and pest control measures;
10. Gives preference to the use of nonchemical pest control measures;

¹See Model Integrated Pest Management Plan for Oregon Schools at
http://www.ipmnet.org/tim/IPM_in_Schools/Model_School_IPM_Plan_Main_Page.html

11. Allows the use of low-impact pesticides if nonchemical pest control measures are ineffective; and
12. Allows the application of a pesticide that is not a low-impact pesticide only to mitigate a declared pest emergency or if the application is by, or at the direction or order of, a public health official.

The district shall designate the [Ben Selibi] as the Integrated Pest Management Plan Coordinator give them the authority for overall implementation and evaluation of the IPM plan.

Integrated Pest Management Plan Coordinator

The IPM Plan Coordinator shall:

13. Attend not less than six hours of IPM training each year. The training shall include at least a general review of integrated pest management principles and the requirements of IPM as required by Oregon statute;
14. Ensure appropriate prior notices are given and posted warnings have been placed when pesticide applications are scheduled;
15. Oversee pest prevention efforts;
16. Ensure identification and evaluation of pest situation;
17. Determine the means of appropriately managing pest damage that will cause the least possible hazard to people, property and the environment;
18. Ensure the proper use and application of pesticide applications when non-pesticide controls have been unsuccessful;
19. Evaluate pest management results; and
20. Keep for at least four years following the application date, records of applied pesticides that include:
 - a. A copy of the label;
 - b. A copy of the ~~Material Data~~ Safety ~~Data~~ Sheet (SDS);
 - c. The brand name and USEPA² registration number of the product;
 - d. The approximate amount and concentration of pesticide applied;
 - e. The location of where the pesticide was applied;
 - f. The type of application and whether the application was effective;
 - g. The name(s) of the person(s) applying the pesticide;
 - h. The pesticide applicator's license numbers and pesticide trainee or certificate numbers of the person applying the pesticide;
 - i. The dates and times for the placement and removal of warning signs; and
 - j. Copies of all required notices given, including the dates the IPM Coordinator gave the notices.
21. Respond to inquiries about the IPM plan and refer complainants to [Board policy KL - Public Complaints];
22. Conduct outreach to district staff about the district's IPM plan.

²U.S. Environmental Protection Agency

END OF POLICY

Legal Reference(s):

[ORS 634.116](#)

[ORS 634.700](#) to-750

Oregon School Boards Association Selected Sample Policy

Code: **EEA**
Adopted:

Student Transportation Services *

School transportation services will be provided for students to and from school [and for] [transporting students to and from curricular and extracurricular activities sponsored by the district] [transporting from one school or facility to another] [school-sponsored field trips that are extensions of classroom learning experiences]. Transportation will be provided for homeless students to and from the student's school of origin¹ as required by the No Child Left Behind Act of 2001 (NCLBA). These services shall be provided throughout the regularly scheduled year and during the regular school day as determined by the [Board].

[Elementary students [grades K-8] who live more than one mile from school will be transported. Secondary students [grades 9-12] who live more than one and one-half miles from school will be transported. Mileage exceptions for health, safety or disability will be made in accordance with the district's approved supplemental plan.]

Students attending any private, parochial or public charter school under the compulsory school attendance laws will, where the private, parochial or public charter school is along or near the bus route, be provided equally the riding privileges given to public school students.

Preschool students with disabilities who have transportation as a related service and children from birth to age three who are enrolled in an eligible program shall be provided home to school transportation.

A seat that fully supports each person and meets the minimum standards and specifications of law will be provided at all times. A person who weighs 40 pounds or less must be properly secured with a child safety system that meets the minimum standards and specifications established by the Oregon Department of Transportation under ORS 815.055. A person over 40 pounds or who has reached the upper weight limit for the forward-facing car seat must use a booster seat until he/she is four feet nine inches tall or age eight and the adult belt properly fits.² A person who is taller than four feet nine inches or eight years of age or older must be properly secured with a safety belt or harness that meets the requirements under ORS 815.055. In accordance with ORS 811.210 and 811.215 vehicles in excess of 10,000 pounds used for student transportation are exempt from statutory requirements unless they have been equipped with lap belts. Vehicles in excess of 10,000 pounds that have been equipped with lap belts must meet child car seat requirements as set forth in law.

School buses carrying students will be considered extensions of the school experience. All students using school transportation will abide by the code of conduct posted in each school bus [or school activity vehicle]. Violations of such code, as well as other conduct which is improper or which jeopardizes the

¹"School of origin" means the school that the student attended when permanently housed or the school in which the student was last enrolled.

²"Proper fit" means the lap belt of the safety belt or safety harness is positioned low across the thighs and the shoulder belt is positioned over the collarbone and away from the neck.

safety of self or others, will be reported by the school bus [or vehicle] driver to [the supervisor]. [The transportation supervisor] will, as soon as possible, inform the appropriate principal of such occurrence. Violators may be denied use of transportation for a period of time as deemed proper by the principal [and/or] transportation supervisor.

The [principal] or designee shall ensure transportation officials and drivers receive notification of students having special medical or behavioral protocols identified in student records.

Appropriate training related to specific protocols, including confidentiality requirements, will be provided to drivers.

The school bus [or vehicle] driver will be responsible for the school bus [or vehicle] at all times from departure until return. The driver will not participate in any activities that might impair his/her driving abilities.

Aides or assistants that ride a school bus shall receive training on emergency procedures and their role in the safe transportation of all students on the bus.

The district will comply with all state and federal laws and regulations pertaining to school bus transportation.

END OF POLICY

Legal Reference(s):

ORS 327.006	ORS 815.055	OAR 581-053-0031
ORS 327.033	ORS 815.080	OAR 581-053-0040
ORS 327.043	ORS 820.100 to-820.190	OAR 581-053-0053
ORS 332.405		OAR 581-053-0060
ORS 332.415	OAR 581-021-0050 to-0075	OAR 581-053-0070
ORS 339.240 to-339.250	OAR 581-022-1530	OAR 581-053-0210
ORS 343.155 to-343.246	OAR 581-023-0040	OAR 581-053-0220
ORS 343.533	OAR 581-053-0002	OAR 581-053-0230
ORS 343.155 to-343.243	OAR 581-053-0003	OAR 581-053-0240
ORS 811.210	OAR 581-053-0004	OAR 735-102-0010
ORS 811.215	OAR 581-053-0010	

No Child Left Behind Act of 2001, 20 U.S.C. §§ 6315, 7912.

Elementary and Secondary Education Act (ESEA) Flexibility Waiver, July 18, 2012.

McKinney-Vento Homeless Education Assistance Improvements Act of 2001, 42 U.S.C. §§ 11431-11435 (2005).

Oregon School Boards Association Selected Sample Policy

Code: **EEACA**
Adopted:

School Bus Driver Examination and Training (Version 1)

The district or transportation provider shall verify that a school bus driver's ~~must pass~~ physical examinations ~~administered~~ were certified by a medical examiner whose certificate was listed in the Federal Motor Carrier Safety Administration's National Registry of Certified Medical Examiners as of the date of the issuance of the school bus driver's examination certificate, and meets 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).

HR10/23/14|RS

Oregon School Boards Association Selected Sample Policy

Code: **EFA**
Adopted:

Local Wellness Program

The Board recognizes that childhood obesity has become an epidemic in Oregon as well as throughout the nation. Research indicates that obesity and many diseases associated with obesity are largely preventable through diet and regular physical activity. Additional research indicated that healthy eating patterns and increased physical activity are essential for students to achieve their academic potential, full physical and mental growth and lifelong health and well-being.

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

The input of staff (including but not limited to, physical education and school health professionals), students, parents, the public, representatives of the school food authority and public health professionals will be encouraged. The superintendent [or designee] will develop [administrative regulations] [guidelines] as necessary to implement the goals of this policy throughout the district.

Nutrition Promotion and Nutrition Education

Nutrition promotion supports the integration of nutrition education throughout the school environment. Nutrition education topics shall be integrated within the sequential, comprehensive health education program taught at every grade level, prekindergarten through grade 12, and coordinated with the district's nutrition and food services operation.

Nutrition Guidelines

It is the intent of the Board that district schools ~~take a~~ proactive effort to ~~in~~ encourage~~ing~~ students to make nutritious food choices. All food and beverage items ~~(except those as part of the United States Department of Agriculture's National School Lunch Program and/or School Breakfast Program or at times when the school is being used for school-related events or nonschool-related events for which parents and other adults are a significant part of an audience or are selling food or beverage items before, during, or after the event such as a sporting event, interscholastic activity, a play, band or choir concert)~~, sold in a K-12 public school as part of the regular or extended school day shall meet the minimum state and federal standards ~~as set forth in state law~~. Exceptions to this requirement include items that are part of the USDA National School Lunch Program or School Breakfast Program. Other exceptions are foods and beverages provided in the following instances:

1. When the school is the site of school-related events or events for which parents and other adults are a significant part of an audience; or
2. The sale of food or beverage items before, during or after a sporting event, interscholastic activity, a play, band or choir concert.

Although the Board believes that the district's nutrition and food services operation should be financially self-supporting, it recognizes, ~~however,~~ that the nutrition program is an essential educational and support activity. Therefore, budget neutrality or profit generation must not take precedence over the nutrition needs of its students. In compliance with federal law, the district's NSLP [and SBP] shall be nonprofit.

The superintendent is directed to develop administrative regulations to implement this policy, ~~including such provisions as may be necessary to~~ that address all food and beverages items sold and/or served to students at in district schools, including provisions for staff development, family and community involvement and program evaluation. These food and beverage items include (i.e., competitive foods, snacks and beverages sold from vending machines, and school stores, and similar food and beverage items from fund-raising activities and refreshments that are made available at school parties, celebrations and meetings), ~~including provisions for staff development, family and community involvement and program evaluation.~~

Physical [Education/]Activity

The Board realizes that a quality physical education program is an essential component for all students to learn about and participate in physical activity. [Every public school student in kindergarten through grade 8 shall participate in physical education for the entire school year. Students in kindergarten through grade 5 shall participate for a least 150 minutes during each school week and students in grades 6 through 8 for at least 225 minutes per school week. At least 50 percent of the weekly physical education class time shall be devoted to actual physical activity. Instruction, provided by adequately prepared teachers, will meet the state adopted academic content standards for physical education, ORS 329.045. Teachers of physical education shall regularly participate in professional development activities.

Students with disabilities shall have suitably adapted physical education incorporated as part of the individualized education program (IEP) developed for the student under ORS 343.151. A student who does not have an IEP but has chronic health problems, other disabling conditions or other special needs that preclude them from participating in regular physical education instruction, shall have suitably adapted physical education incorporated as part of an individualized health plan developed for the student by the district or public charter school.^{1]}

Physical activity should be included in a school's daily education program ~~from for~~ grades pre-K through 12. Physical activity should include regular instructional physical education as well as co-curricular activities, and recess. The district will develop and assess student performance standards [and program minute requirements]¹ in order to meet the Oregon Department of Education's physical education content standards [and state law]¹.

Reimbursable School Meals

The district may enter into an agreement with the Oregon Department of Education (ODE) to operate reimbursable school meal programs. The superintendent will develop administrative regulations as necessary to implement this policy and meet the requirements of state and federal law. These guidelines shall not be less restrictive than regulations and guidance issued by the Secretary of Agriculture pursuant to subsections (a) and (b) of section 10 of the Child Nutrition Act (42 U.S.C. 1779) and section 9(f)(1) and 17(a) of the Richard B. Russell National School Lunch Act (42 U.S.C. 1758(f)(1), 1766(a)(0).

¹HB 3141 (effective 2017-2018 school year)

[School Employee Wellness]²

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

The district will work with community partners to identify programs/services and resources to compliment and enrich employee wellness endeavors.]

Other School-Based Activities

The district will promote district and community-based activities that foster healthy eating and create environments that promote physical activity. Families and the community will be encouraged to provide healthy food choices in all situations where food is served. Educational workshops, screenings and literature related to healthy food choices and physical activity may be offered to families.

Evaluation of the Local Wellness Policy

The Board will involve staff (including but not limited to, physical education and school health professionals), parents, students, representatives of the school food authority, public health professionals, school administrators and the public in the development, implementation and periodic review and yearly update of this policy. [The Board shall establish a Wellness Advisory Committee to advise the district in the creation of the local wellness policy. The policy will be reviewed every [three years].]In an effort to measure the implementation of this policy the Board designates the [district principal] as the [person,] who will be responsible for ensuring each school meets the goals outlined in this policy. The district will make available to the public annually, an assessment of the implementation, including the extent to which the schools are in compliance with policy, how the policy compares to model policy and a description of the progress being made in attaining the goals of this policy.

END OF POLICY

²[This language is optional and is not required by state or federal law.]

Legal Reference(s):

[ORS 329.496](#)
[ORS 332.107](#)
[ORS 336.423](#)

[OAR 581-051-0100](#)
[OAR 581-051-0305](#)

[OAR 581-051-0310](#)
[OAR 581-051-0400](#)

National School Lunch Program, 7 C.F.R. Part 210 (2006).
School Breakfast Program, 7 C.F.R. Part 220 (2006).
Healthy, Hunger-Free Kids Act of 2010, Public Law 111-296 Section 204.

Oregon School Boards Association Selected Sample Policy

Code: **EFAA**
Adopted:

District Nutrition and Food Services

The district may enter into an agreement with the Oregon Department of Education (ODE) to operate the National School Lunch Program (NSLP) and the Commodity Food Distribution Program (CFDP) by signing a permanent Sponsor-ODE Agreement entitling the district to receive reimbursement for all meals that meet program requirements and to earn ~~commodity food~~ **USDA Food** entitlement based on the number of lunches served.

The permanent agreement shall be signed by the superintendent or other school official with authority to obligate the district to legally binding contracts, subject to annual ODE renewal and will include, at the district's option, an agreement to operate the School Breakfast Program (SBP), Summer Food Service Program (SFSP), the Child and Adult Care Food Program (CACFP) and the Special Milk Program (SMP). The district recognizes that meals and snacks served by the district will not be eligible for reimbursement until the annual program update is received and approved by ODE.

The permanent Sponsor-ODE Agreement shall include assurances by the district that it will follow all NSLP regulations regarding:

1. Free and reduced price process (updated annually);
2. Financial management of the nonprofit school food service;
3. Civil rights and confidentiality procedures;
4. **Meal pattern and N**utrition content of meals served;
5. Use and control of commodity foods;
6. Accuracy of reimbursement claims;
7. Food safety and sanitation inspections.

The superintendent will develop administrative regulations as necessary to implement this policy and meet the requirements of state and federal law. The regulation(s) will be reviewed and adopted by the Board as required by law.

END OF POLICY

Legal Reference(s):

[ORS 327.520 to -327.535](#)

[OAR 581-051-0305](#)

[OAR 581-051-0310](#)

[OAR 581-051-0100](#)

[OAR 581-051-0400](#)

Nondiscrimination on the Basis of Handicap in Programs or Activities Receiving Federal Financial Assistance, 7 C.F.R. Part 15b (2001).

U.S.D.A., ELIGIBILITY GUIDANCE FOR SCHOOL MEALS MANUAL.

U.S.D.A., FNS INSTRUCTION 765-7 REV. 2: HANDLING LOST, STOLEN AND MISUSED MEAL TICKETS.

Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. 1751 §§ 203, 205.

Oregon School Boards Association Selected Sample Policy

Code: **EFAA-AR**
Adopted:

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

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

Meal Pricing Procedures

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

Application Procedures

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

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

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

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

Financial Management of the Nonprofit School Food Service

1. The district will maintain a nonprofit school nutrition and food service operation.
2. Revenues earned by the school nutrition and food services will be used only for the operation or improvement of NSLP[,], [and] [SMP] [SBP].
3. Lunch and breakfast meals served to teachers, administrators, custodians and other adults not directly involved with the operation of the district's nutrition and food services will be priced to cover all direct and indirect cost of preparing and serving the meal.³
4. District nutrition and food services revenues will not be used to purchase land or buildings.
5. The district will limit its nutrition and food services net cash resources to an amount that does not exceed three months average expenditures.
6. The district will maintain effective control and accountability for, and adequately safeguard, all nutrition and food services' cash, real and personal property, equipment and other assets, and ensure they are used solely for nutrition and food services purposes.
7. The district will meet the requirements for allowable NSLP[,], [and] [SMP] [SBP] costs as described in the Office of Management and Budget (OMB) circular A-87 2 C.F.R. 200.

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

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

Civil Rights and Confidentiality Procedures

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

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

Nutrition and Menu Planning

1. Meals and snacks served for reimbursement will meet the recommendations of the most current *Dietary Guidelines for Americans*.
2. Meals [and snacks] served for reimbursement will meet at least the minimum NSLP [and SBP] requirements for food items and quantities.
3. Meals served for reimbursement will:
 - a. Meet all ~~minimum and maximum~~ calorie **range** requirements by grade level;
 - b. Meet the maximum standards set for saturated fat;
 - c. Meet the maximum standards set for sodium by grade level⁴; and
 - d. Meet the requirement for zero grams of trans fats.
4. The district will use the offer versus serve option when serving NSLP lunches to senior high school students. High school students must take at least three of five different food items including one-half cup of fruit or vegetable offered in program lunches.
5. [The district will use the offer versus serve option when serving program breakfasts to senior high school students. High school students must take at least three of four food items, including one-half cup of fruit or vegetable offered in program breakfasts.⁵]
6. [The district will use the offer versus serve option when serving program lunches to students below senior high school grades. Students below high school grades will be required to take three of the five food items, including one-half cup of fruit or vegetable offered in program lunches.]
7. [The district will use the offer versus serve option when serving program breakfasts to students below senior high school grades. Students below high school grades will be required to take three of the four food items, including one-half cup of fruit offered in program breakfasts.⁵]
8. A copy of the Board minutes adopting the offer versus serve policy for students below high school grades for program lunches and/or for all students in the district for program breakfasts, as applicable, will be made available upon request.⁶

Use and Control of Commodity Foods

⁴~~Implementation by the 2014-2015 school year.~~

⁵~~Implementation by the 2014-2015 school year.~~

⁶Modify the language of this item to be reflective of the options the district has selected for offer versus serve.

9. The district will accept and use commodity foods in as large a quantity as may be efficiently utilized in the reimbursable lunch [and breakfast] program.
10. The district will maintain necessary safeguards to prevent theft or spoilage of commodity foods.
11. The value of commodity foods used for any food production other than NSLP, SBP or snacks shall be replaced in the food service inventory.

Accuracy of Reimbursement Claims

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

Food Safety and Sanitation Inspections

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

General USDA NSLP/SBP/SMP Requirements

1. The district will ensure that no student is denied a meal as a disciplinary action.
2. Breakfast will be served in the morning hours, at or near the beginning of the student’s school day.
3. Lunch will be served between the hours of 10 a.m. and 2 p.m.
4. The district will provide substitute foods for students who are determined by a licensed physician to be legally disabled and whose disability restricts their diet. Substitutions will be provided only when

a medical statement from the licensed physician is on file at the school. The medical statement must state the nature of the child's disability and how the disability affects the child's nutrition needs, and it must provide a medical prescription for substitute foods or texture modification. The district will not charge more than the price of the school meal, as determined by the child's eligibility status, for substitute meals or foods.

5. The district will control the sale of ~~the following foods of minimal nutritional value (FMNV): carbonated beverages, water ices, chewing gum, hard candy, jelly and gum candies, marshmallow candy, fondant (candy corn type), licorice, cotton candy and candy-coated popcorn~~ competitive foods.
6. ~~The district will ensure that soda pop vending machines and sales of other FMNV will not be allowed in any school's dining site(s) during the time(s) when NSLP lunch meals or SBP breakfast meals are served or eaten. Dining sites are cafeterias and any other place where NSLP lunch meals or SBP breakfast meals are served or eaten.~~
6. The district will ensure that potable [drinking] water will be available to students, free of charge for consumption in the place where meals are served during meal service.⁷
7. The district ~~[allows no meal charges]~~ [will notify all households of its meal charge requirements early in the school year]. [The district's meal charging requirements are as follows:

A charge account for students paying full or reduced price for meals may be established with the district. Students may charge no more than [two] meals. Any student failing to keep his/her account current as required by the district shall not be allowed to charge the price of further meals until the account has been paid in full [but will be allowed to purchase a meal if the student pays for the meal when it is received]. At least one written warning shall be provided to a student ~~and his/her parent~~ prior to denying meals for exceeding the district's charge limit]. ~~Payment is due to the [district office] on the [] of each month.~~ At least one verbal or written warning will be provided to a student's parents prior to denying a meal for exceeding the district's charge limit. Students or parents of students may prepay meal costs.]⁸
8. The sale of foods ~~(other than FMNV)~~ in competition with the district's lunch (NSLP) or breakfast (SBP) programs will be allowed in dining sites during lunch and breakfast periods with Board approval only when all income from the food sales accrues to the benefit of the district's nutrition and food services or accrues to a school or student organization approved by the Board. A copy of the Board minutes approving and defining competitive food sales will be made available upon request.
9. ~~The district will not use nutrition and food services funds to purchase FMNV for sale unless the proceeds from the sale of those foods is deposited into the Nutrition and Food Services account in an amount sufficient to cover all direct and indirect costs relating to the purchase and service of the foods.~~
10. ~~Soda pop and any other FMNV will not be offered "at no additional cost" with NSLP lunch meals or SBP breakfast meals in any district school.~~

⁷New requirement under Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. 1751 §§ 203.

⁸[Language is suggested only.]Revise to reflect district's meal charging requirements and ensure information is communicated to students and parents.

Record Keeping

9. All currently approved and denied confidential applications for free and reduced price meals~~[-free milk]~~ and all current direct certification documents will be maintained for three years after the current school year. Records will be maintained longer in the event of an unresolved audit(s), until the audit(s) has been completed.
10. All currently approved and denied confidential applications for free and reduced price meals~~[-free milk]~~ and all current direct certification documents will be readily retrievable by school or site and made available to state or federal reviewers upon request.
11. The district will maintain financial records that account for all revenues and expenditures of the nonprofit school nutrition and food services programs for a period of three years after the school year to which they pertain.

Oregon School Boards Association Selected Sample Policy

Code: **IIBGA**
Adopted:

Electronic Communications System

The Board is committed to the development and establishment of a quality, equitable and cost-effective electronic communications system. The system's sole purpose shall be for the advancement and promotion of learning and teaching.

The district's system will be used to provide statewide, national and global communications opportunities for staff and students.

The superintendent will establish administrative regulations for the use of the district's system including compliance with the following provisions of the Children's Internet Protection Act:

1. Technology protection measures, installed and in continuous operation, that protect against Internet access by both adults and minors to visual depictions that are obscene, child pornography or, with respect to the use of the computers by minors, harmful to minors;
2. Educating minors about appropriate online behavior, including cyberbullying awareness and response, and how to interact with other individuals on social networking sites and in chat rooms;
3. Monitoring the online activities of minors;
4. Denying access by minors to inappropriate matter on the Internet and World Wide Web;
5. Ensuring the safety and security of minors when using e-mail, social media, chat rooms and other forms of direct electronic communications;
6. Prohibiting unauthorized access, including so-called "hacking" and other unlawful activities by minors online;
7. Prohibiting unauthorized disclosure, use and dissemination of personal information regarding minors;
8. Installing measures designed to restrict minors' access to materials harmful to minors.

The superintendent will establish administrative regulations for use of the district's system by staff using their own personal electronic devices to download and store district proprietary information including personally recognizable information about the district students or staff. Regulations shall insure compliance with privacy rights under applicable federal and state laws and regulations, including but not limited to the Age Discrimination in Employment Act of 1967 (ADEA), the Americans with Disabilities Act (ADA), the Genetic Information Nondiscrimination Act of 2008 (GINA) and the Health Insurance Portability and Accountability Act of 1996 (HIPPA).

The administrative regulations will be consistent with sound guidelines as may be provided by the education service district, the Oregon Department of Education and/or the Oregon Government Ethics Commission and will include a complaint procedure for reporting violations.

The superintendent will also establish administrative regulations for use of the district's electronic communications system to comply with copyright law.

Failure to abide by district policy and administrative regulations governing use of the district's system may result in the suspension and/or revocation of system access. Additionally, student violations will result in discipline up to and including expulsion. Staff violations will also result in discipline up to and including dismissal. Violations of law will be reported to law enforcement officials and may result in criminal or civil sanctions. Fees, fines or other charges may also be imposed.

END OF POLICY

Legal Reference(s):

ORS 30.765	ORS 167.080	ORS 339.270
ORS 133.739	ORS 167.087	
ORS 163.435	ORS 167.090	OAR 581-021-0050
ORS 164.345	ORS 167.095	OAR 581-021-0055
ORS 164.365	ORS Chapter 192	OAR 584-020-0040
ORS 167.060	ORS 332.107	OAR 584-020-0041
ORS 167.065	ORS 336.222	
ORS 167.070	ORS 339.250	

Children's Internet Protection Act, 47 U.S.C. Sections 254 (h) and (l) (2008); 47 CFR Section 54.520 (2001).
Copyrights, Title 17, as amended, United States Code; 19 CFR Part 133 (2000).
Oregon Attorney General's Public Records and Meetings Manual, pp. 24-26, Appendix H, Department of Justice (2001).
Safe and Drug-Free Schools and Communities Act, 20 U.S.C. Sections 7101-7117.
Drug-Free Workplace Act of 1988, 41 U.S.C. Sections 701-707; 34 CFR Part 85, Subpart F.
Controlled Substances Act, 21 U.S.C. Section 812, schedules I through V, 21 CFR 1308.11-1308.15 (2000).
Drug-Free Schools and Communities Act Amendments of 1989, P.L. 101-226, 103 Stat. 1928.
Americans with Disabilities Act of 1990, 42 U.S.C. Sections 12101-12213; 29 CFR Part 1630 (2000); 28 CFR Part 35 (2000).
Family Educational Rights and Privacy Act, 20 U.S.C. Section 1232g; 34 CFR Part 99 (2000).
Oregon Government Standards and Practices Commission, Advisory Opinion No. 98A-1003 (July 9, 1998).
No Child Left Behind Act of 2001, P.L. 107-110, Title II, Section 2441.
Americans with Disabilities Act Amendments Act of 2008.

Oregon School Boards Association Selected Sample Policy

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

Electronic Communications System

Definitions

1. “Technology protection measure,” as defined by the Children’s Internet Protection Act (CIPA), means a specific technology that blocks or filters Internet access to visual depictions that are:
 - a. Obscene, as that term is defined in Section 1460 of Title 18, United States Code;
 - b. Child pornography, as that term is defined in Section 2256 of Title 18, United States Code; or
 - c. Harmful to minors.
2. “Harmful to minors,” as defined by CIPA, means any picture, image, graphic image file or other visual depiction that:
 - a. Taken as a whole and with respect to minors, appeals to a prurient interest in nudity, sex or excretion;
 - b. Depicts, describes or represents, in a patently offensive way with respect to what is suitable for minors, an actual or simulated sexual act or sexual contact, actual or simulated normal or perverted sexual acts, or a lewd exhibition of the genitals; and
 - c. Taken as a whole, lacks serious literary, artistic, political or scientific value to minors.
3. “Sexual act; sexual contact,” as defined by CIPA, have the meanings given such terms in Section 2246 of Title 18, United States Code.
4. “Minor,” as defined by CIPA, means an individual who has not attained the age of 17. For the purposes of Board policy and this administrative regulation, minor will include all students enrolled in district schools.
5. “Inappropriate matter,” as defined by the district, means material that is inconsistent with general public education purposes, the district’s mission and goals.¹
6. “District proprietary information” is defined as any information created, produced or collected by district staff for the business or education purposes of the district including but not limited to student information, staff information, parent or patron information, curriculum, forms and like items used to conduct the district’s business.
7. “District software” is defined as any commercial or staff developed software acquired using district resources.

¹As inappropriate matter is not defined in the CIPA or regulations, districts should define the scope of what it will regard as inappropriate matter. The language provided in #5. is intended as a guide only.

General District Responsibilities

The district will:

1. Designate staff as necessary to ensure coordination and maintenance of the district's electronic communications system which includes all district computers, e-mail and Internet access;
2. Provide staff training in the appropriate use of the district's system including copies of district policy and administrative regulations. Staff will provide similar training to authorized system users;
3. Provide a system for authorizing staff use of personal electronic devices to download or access district proprietary information, that insures the protections of said information and insures its removal from the device when its use is no longer authorized;
4. Provide a system for obtaining prior written agreement from staff for the recovery of district proprietary information downloaded to staff personal electronic devices as necessary to accomplish district purposes, obligations or duties, and when the use on the personal electronic device is no longer authorized, to insure verification that information downloaded has been properly removed from the personal electronic device;
5. Cooperate fully with local, state or federal officials in any investigation relating to misuse of the district's system;
6. Use only properly licensed software, audio or video media purchased by the district or approved for use by the district. The district will comply with the requirements of law regarding the use, reproduction and distribution of copyrighted works and with applicable provisions of use or license agreements;
7. [Install and use desktop and/or server virus detection and removal software;]
8. Provide technology protection measures that protect against Internet access by both adults and minors to visual depictions that are obscene, child pornography, or with respect to the use of computers by minors, harmful to minors. A supervisor or other individual authorized by the principal may disable the technology protection measures to enable access for bona fide research or other lawful purposes, as deemed appropriate;
9. Prohibit access by minors, as defined by CIPA and this regulation, to inappropriate matter on the Internet and World Wide Web;
10. Provide staff supervision to monitor the online activities of students to prevent unauthorized access, including "hacking" and other unlawful activities online, and ensure the safety and security of minors when authorized to use e-mail, social media, chat rooms and other forms of direct electronic communication;
11. Provide student education about appropriate online behavior, including cyberbullying awareness and response, and how to interact with other individuals on social networking and social media websites and in chat rooms;
12. Determine which users and sites accessible as part of the district's system are most applicable to the curricular needs of the district and may restrict user access, accordingly;

13. [Determine which users will be provided access to the district's e-mail system;]
14. [Program its computers to display a message reinforcing key elements of the district's Electronic Communications System policy and regulation when accessed for use;]
15. Notify appropriate system users that:
 - a. The district retains ownership and control of its computers, hardware, software and data at all times. All communications and stored information transmitted, received or contained in the district's information system are the district's property and are to be used for authorized purposes only. Use of district equipment or software for unauthorized purposes is strictly prohibited. To maintain system integrity, monitor network etiquette and ensure that those authorized to use the district's system are in compliance with Board policy, administrative regulations and law, the school administrators may routinely review user files and communications;
 - b. Files and other information, including e-mail, sent or received, generated or stored on district servers are not private and may be subject to monitoring. By using the district's system, individuals consent to have that use monitored by authorized district personnel. The district reserves the right to access and disclose, as appropriate, all information and data contained on district computers and district-owned e-mail system;
 - c. [The district may establish a retention schedule for the removal of e-mail;]
 - d. [E-mail sent or received by a Board member or employee in connection with the transaction of public business may be a public record and subject to state archivist rules for retention and destruction;]
 - e. Information and data entered or stored on the district's computers and e-mail system may become discoverable evidence if a public records request is made or a lawsuit is filed against the district. "Deleted" or "purged" data from district computers or e-mail system may be retrieved for later public records disclosure or disciplinary purposes, as deemed necessary by the district;
 - f. [The district may set quotas for system disk usage. The district may allow system users to increase their quota by submitting a written request to the supervising teacher or system coordinator stating the need for the increase;]
 - g. Passwords used on the district's system are the property of the district and must be provided to their supervisor or designated district personnel, as appropriate. Passwords that have not been provided to the district are prohibited;
 - h. Transmission of any materials regarding political campaigns is prohibited.
16. Ensure all student[, staff] and nonschool system users complete and sign an agreement to abide by the district's electronic communications policy and administrative regulations. All such agreements will be maintained on file in the [school office];
17. Notify users of known copyright infringing activities and deny access to or remove the material.

System Access

1. Access to the district's system is authorized to:

Board members, district employees, students in grades [K-12], with parent approval and when under the direct supervision of staff, [and district volunteers, district contractors or other members of the public as authorized by the system coordinator or district administrators consistent with the district's policy governing use of district equipment and materials].

2. [Students, staff, Board members, volunteers, district contractors and other members of the public may be permitted to use the district's system for personal use, in addition to official district business, consistent with Board policy, general use prohibitions/guidelines/etiquette and other applicable provisions of this administrative regulation. Personal use of district-owned computers including Internet and e-mail access by employees is prohibited during the employee's work hours. Additionally, Board member and employee use of district-owned computers may be permitted only when such use does not violate the provisions of ORS 244.040 and use is under the same terms and conditions that access is provided to the general public under the district's policy governing use of district equipment and materials.]

General Use Prohibitions/Guidelines/Etiquette

Operation of the district's system relies upon the proper conduct and appropriate use of system users. Students, staff and others granted system access are responsible for adhering to the following prohibitions and guidelines which require legal, ethical and efficient utilization of the district's system.

1. Prohibitions

The following conduct is strictly prohibited:

- a. Attempts to use the district's system for:
 - (1) Unauthorized solicitation of funds;
 - (2) Distribution of chain letters;
 - (3) Unauthorized sale or purchase of merchandise and services;
 - (4) Collection of signatures;
 - (5) Membership drives;
 - (6) Transmission of any materials regarding political campaigns.
- b. Attempts to upload, download, use, reproduce or distribute information, data, software, or file share music, videos or other materials on the district's system in violation of copyright law or applicable provisions of use or license agreements;
- c. Attempts to degrade, disrupt or vandalize the district's equipment, software, materials or data or those of any other user of the district's system or any of the agencies or other networks connected to the district's system;
- d. Attempts to evade, change or exceed resource quotas or disk usage quotas;
- e. Attempts to send, intentionally access or download any text file or picture or engage in any communication that includes material which may be interpreted as:
 - (1) Harmful to minors;

- (2) Obscene or child pornography as defined by law or indecent, vulgar, profane or lewd as determined by the district;
 - (3) A product or service not permitted to minors by law;
 - (4) Harassment, intimidation, menacing, threatening or constitutes insulting or fighting words, the very expression of which injures or harasses others;
 - (5) A likelihood that, either because of its content or the manner of distribution, it will cause a material or substantial disruption of the proper and orderly operation of the school or school activity;
 - (6) Defamatory, libelous, reckless or maliciously false, potentially giving rise to civil liability, constituting or promoting discrimination, a criminal offense or otherwise violates any law, rule, regulation, Board policy and/or administrative regulation.
- f. Attempts to gain unauthorized access to any service via the district's system which has a cost involved or attempts to incur other types of costs without specific approval. The user accessing such services will be responsible for these costs;
 - g. Attempts to post or publish personal student contact information unless authorized by the system coordinator or teacher and consistent with applicable Board policy pertaining to student directory information and personally identifiable information. Personal contact information includes photograph, age, home, school, work or e-mail addresses or phone numbers or other unauthorized disclosure, use and dissemination of personal information regarding students;
 - h. Attempts to arrange student meetings with anyone on the district's system, unless authorized by the system coordinator or teacher and with prior parent approval;
 - i. Attempts to use the district's name in external communication forums such as chat rooms without prior district authorization;
 - j. Attempts to use another individual's account name or password, failure to provide the district with individual passwords or to access restricted information, resources or networks to which the user has not been given access.

2. Guidelines/Etiquette

[Appropriate system use etiquette is expected of all users and is explained in district training sessions.]

Complaints

Complaints regarding use of the district's Electronic Communications System may be made to the teacher, principal, employee's supervisor or system coordinator. The district's established complaint procedure will be used for complaints concerning violations of the district's Electronic Communications System policy and/or administrative regulation. See Board policy [KL - Public Complaints [and accompanying administrative regulation]].

Violations/Consequences

1. Students

- a. Students who violate general system user prohibitions shall be subject to discipline up to and including expulsion and/or revocation of district system access up to and including permanent loss of privileges.
- b. Violations of law will be reported to law enforcement officials and may result in criminal or civil sanctions.
- c. Disciplinary action may be appealed by parents, students and/or a representative in accordance with established district procedures.

2. Staff

- a. Staff who violate general system user prohibitions shall be subject to discipline up to and including dismissal in accordance with Board policy, collective bargaining agreements and applicable provisions of law.
- b. Violations of law will be reported to law enforcement officials and may result in criminal or civil sanctions.
- c. Violations of applicable Teacher Standards and Practices Commission (TSPC), Standards for Competent and Ethical Performance of Oregon Educators will be reported to TSPC as provided by OAR 584-020-0041.
- d. Violations of ORS 244.040 will be reported to OGEC.

3. Others

- a. Other guest users who violate general system user prohibitions shall be subject to suspension of system access up to and including permanent revocation of privileges.
- b. Violations of law will be reported to law enforcement officials or other agencies, as appropriate, and may result in criminal or civil sanctions.

Telephone/Membership/Other Charges

1. The district assumes no responsibility or liability for any membership or phone charges including, but not limited to, long distance charges, per minute (unit) surcharges and/or equipment or line costs incurred by any home usage of the district's system.

2. Any disputes or problems regarding phone services for home users of the district's system are strictly between the system user and their local phone company and/or long distance service provider.

Information Content/Third Party Supplied Information

1. System users and parents of student system users are advised that use of the district's system may provide access to materials that may be considered objectionable and inconsistent with the district's mission and goals. Parents should be aware of the existence of such materials and monitor their student's home usage of the district's system accordingly.
2. Opinions, advice, services and all other information expressed by system users, information providers, service providers or other third-party individuals are those of the providers and not the district.
3. System users may, with supervising teacher or system coordinator approval, order services or merchandise from other individuals and agencies that may be accessed through the district's system. These individuals and agencies are not affiliated with the district. All matters concerning merchandise and services ordered including, but not limited to, purchase terms, payment terms, warranties, guarantees and delivery are solely between the seller and the system user. The district makes no warranties or representation whatsoever with regard to any goods or services provided by the seller. District staff and administration shall not be a party to any such transaction or be liable for any costs or damages arising out of, either directly or indirectly, the actions or inactions of sellers.
4. The district does not warrant that the functions or services performed by or that the information or software contained on the system will meet the system user's requirements or that the system will be uninterrupted or error-free or that defects will be corrected. The district's system is provided on an "as is, as available" basis. The district does not make any warranties, whether express or implied including, without limitation, those of merchantability and fitness for a particular purpose with respect to any services provided by the system and any information or software contained therein.

Sample Parent Letter

Dear Parents:

Your student has [requested] [been selected] to participate in the district's electronic communications program and needs your permission to do so. Your student will be able to communicate with other schools, colleges, organizations and individuals around the world through the Internet and other electronic information systems/networks.

The Internet is a system which links networks creating a large and diverse communications network. Internet access allows your student the opportunity to reach out to many other people to share information, learn concepts and research subjects by the sending and receiving of messages using a computer, modem and phone lines.

With this educational opportunity also comes responsibility. It is important that you and your student read the enclosed district policy, administrative regulation and agreement form and discuss these requirements together. Inappropriate system use will result in discipline up to and including expulsion from school, suspension or revocation of your student's access to the district's system and/or referral to law enforcement officials.

Although the district is committed to practices that ensure the safety and welfare of system users, including the use of technology protection measures such as Internet filtering, please be aware that there may still be material or communications on the Internet that district staff, parents and students may find objectionable. While the district neither encourages nor condones access to such material, it is not possible for us to eliminate that access completely.

Attached to this letter are the following important documents:

1. An agreement for your student to read and sign stating his/her agreement to follow the district's Electronic Communications System policy and administrative regulation. This agreement requires your signature. It must be signed and renewed each year and will be kept on file at the school;
2. The district's Electronic Communications System policy and administrative regulation.

Please review these materials carefully with your student and return the attached agreement form to the [school office] indicating your permission or denial of permission for your student to participate in the district's electronic communications system.

Sincerely,

[System Coordinator/Administrator]

Student Agreement for an Electronic Communications System Account
Academic Year [2014-2015]

Student agreement must be renewed each academic year.

Student Section

Student Name _____ Grade _____

School _____

I have read the district's Electronic Communications System policy and administrative regulation and agree to abide by their provisions. I understand that violation of these provisions will result in discipline up to and including expulsion from school and/or suspension or revocation of system access and related privileges and/or referral to law enforcement officials.

Student Signature _____ Date _____

Sponsoring Parent

I have read the district's Electronic Communications System policy and administrative regulation. I will monitor my student's use of the system and his/her potential access to the Internet and will accept responsibility for supervision in that regard if and when my student's use is not in a school setting. In consideration for the privilege of using the district's Electronic Communications System and in consideration for having access to the public networks, I hereby release the district, its operators and any institutions with which they are affiliated from any and all claims and damages of any nature arising from my, or my student's use, or inability to use, the system including, without limitation, the type of damages identified in the district's policy and administrative regulation.

☐ I give my permission to issue an account for my student and certify that the information contained on this form is correct.

☐ I do not give my permission for my student to participate in the district's communications system.

Signature of Parent _____

Home Address _____

Date _____ Home Phone Number _____

This space reserved for System Coordinator

Assigned Username: _____ Assigned Password: _____

Agreement for an Electronic Communications System Account
(Nonschool System User)

I have read the district's Electronic Communications System policy and administrative regulation and agree to abide by their provisions. I understand that violation of these provisions will result in suspension or revocation of system access and related privileges and/or referral to law enforcement officials.

In consideration for the privilege of using the district's Electronic Communications System and in consideration for having access to the public networks, I hereby release the district, its operators and any institutions with which they are affiliated from any and all claims and damages of any nature arising from my use or inability to use the system including, without limitation, the type of damages identified in the district's policy and administrative regulation.

Signature _____

Home Address _____

Date _____ Home Phone Number _____

This space reserved for System Coordinator

Assigned Username: _____ Assigned Password: _____

Agreement for an Electronic Communications System Account
(Staff System User)

I have read the district's Electronic Communications System policy and administrative regulation and agree to abide by their provisions. I understand that violation of these provisions will result in suspension or revocation of system access and related privileges, and may include discipline, up to and including dismissal and/or referral to law enforcement officials.

I understand that I may use my personal electronic device (PED) for education related purposes and that certain district proprietary information may be downloaded to my PED. I agree that any district proprietary information downloaded on my PED will only be as necessary to accomplish district purposes, obligations or duties, and will be properly removed from my PED when the use on my PED is no longer authorized. I insure that the personal electronic device in use is owned by me, and I am in complete control of the device at all times.

In consideration for the privilege of using the district's Electronic Communications System and in consideration for having access to the public networks, I hereby release the district, its operators and any institutions with which they are affiliated from any and all claims and damages of any nature arising from my use or inability to use the system including, without limitation, the type of damages identified in the district's policy and administrative regulation.

Signature _____

Home Address _____

Date _____ Home Phone Number _____

This space reserved for System Coordinator

Assigned Username: _____ Assigned Password: _____

Oregon School Boards Association Selected Sample Policy

Code: **JECB**
Adopted:

Admission of Nonresident Students

The district may enroll nonresident students as follows:

1. **Interdistrict Transfer Agreement.** By written consent of the affected school boards. The student becomes a “resident pupil” of the attending district thereby allowing the attending district to receive State School Fund moneys;
2. **Open Enrollment.** By written consent from the school board with which the student has made application for admission. The student becomes a “resident pupil” of the attending district thereby allowing the attending district to receive State School Fund moneys;
3. **Tuition Paying Student.** By ~~unilaterally admitting with tuition~~ a nonresident student **with tuition**, whereby neither ~~affected districts~~ **is** eligible for State School Fund moneys;
4. **Court placement.** If a juvenile court determines it is in the student’s best interest, a student placed in a substitute care program outside the district will continue to be considered a resident student and allowed to attend the school the student attended prior to placement. The public agency placing the student in a substitute care program will be responsible for the transportation of the student, if public agency funds are available.

The Board shall deny regular school admission to nonresident students who are under expulsion from another district for a weapons policy violation. The Board ~~[will]~~ ~~[will not]~~ [may, based on district criteria,] deny [regular school] ~~[alternative education program]~~ admission to nonresident students who are under expulsion from another district for reasons other than a weapons policy violation.

Admission by Consent of Both the Affected Boards of a Nonresident Student by Interdistrict Transfer or Consent for Admission of a Tuition Paying Student

~~[Annually, by [date to be set by the Board¹], the Board shall establish the number of student transfer requests into the district, and out of the district, to which consent will be given for the upcoming school year.]~~

The Board reserves the right to accept/reject nonresident students based upon the availability of space; **and** resources, ~~personnel and appropriate programs~~. The Board may not consider nor ask for any information from the student about race, religion, sex, sexual orientation, ethnicity, national origins, disability, health, whether a student has an individual education program (IEP) or the terms of that IEP, identified as talented and gifted, income level, residence, proficiency in English, athletic ability or academic records. The Board

¹The district must annually make this determination by a date set by the Board. Insert the date set by the Board.

may not request or require the student to participate in an interview, tour any of the schools or facilities, or otherwise meet with any representatives of the school or district prior to the district deciding whether to give consent.

The Board may ask for the student's name, contact information, date of birth, grade level and whether the student is currently expelled.

If the number of students seeking consent exceeds the number of spaces, the Board will use an equitable lottery selection process. The process may give priority to students who have siblings currently enrolled in the district. [For the 2014-2015 school year only, this process may also give priority to nonresident students who received consent from the Board for the 2013-2014 school year.]

The Board may revise the maximum number of students to whom consent will be given at a time other than the annual date established by the Board if there are no pending applications for consent.

If the Board decides not to give consent to a student the Board must provide a written explanation to the student.

The Board may determine the length of time the consent is given. Any limitations in length of time must be applied consistently among all students to whom consent is given.

The district is not required to provide transportation outside the boundaries of the district. The student will be allowed to use existing bus routes and transportation services of the district. Transportation will be provided if required by federal law. The attending district is responsible for a free appropriate public education for those students on an IEP.

Consent by the Nonresident District Board for which the Student has applied for Admission (Open Enrollment)

Annually, by March 1, the Board shall establish the number of students to whom consent will be given for the upcoming school year. The Board may choose to limit consent based on school, grade or the combination of both. The Board may decide not to give consent to any person under this process.

Applications for consent shall be submitted to the district no later than April 1, for the following school year.

The Board may not deny consent, give priority nor request student information related to race, religion, sex, sexual orientation, ethnicity, national origin, disability, health, whether a student has an individual education program (IEP) or the terms of that IEP, income level, residence, proficiency in the English language, athletic ability, academic records or eligibility or participation in talented and gifted programs.

If the number of students seeking consent exceeds the number of students the Board has determined will be given consent, consent will be based on an equitable lottery selection process.

The district is not required to provide transportation outside the boundaries of the district. The student will be allowed to use existing bus routes and transportation services of the district. Transportation will be provided if required by federal law.

By May 1, the district shall provide written notification of admission of a nonresident student into the district, to the district of the student's legal residence.

END OF POLICY

Legal Reference(s):

[ORS 109.056](#)

[ORS 327.006](#)

[ORS 329.485](#)

[ORS 335.090](#)

[ORS 339.115 to -339.133](#)

[ORS 339.141](#)

[ORS 339.250](#)

[ORS 343.221](#)

[ORS 433.267](#)

Letter Opinions, Office of the OR Attorney General (March 15, April 18, June 30 1988).
OR. DEP'T OF EDUC., ODE EXECUTIVE MEMORANDA 23-1988-89, 42-1994-95.

Oregon School Boards Association Selected Sample Policy

Code: **JECB-AR(3)**
Revised/Reviewed:

Application for Nonresident Student Admission – Open Enrollment

(Consent by Nonresident District only)

School Year _____

For Office Use Only

Student ID# _____

Student Information

Legal Last Name _____ Legal First Name _____ Legal Middle Name _____

Mailing Address _____ Apartment # _____

City _____ State _____ Zip _____

Date of Birth _____ (MM/DD/YY) Student Grade Level in [2014-2015] _____

Primary Phone of Parent/Guardian _____ Secondary Phone _____

Email Address _____

Parent/Guardian Name (Person in Parental Relationship) _____

Is the student currently under expulsion? ☐ Yes ☐ No

If yes, what was the reason? _____

[Is there a sibling of this applicant currently attending in this district? ☐ Yes ☐ No

If yes, name of sibling and school attending: _____]

If my child is admitted, I hereby authorize the release of the student educational records to _____
(name of district) and certify that I am the parent or guardian in legal custody of the student.

Signature of Parent/Guardian _____ Date _____

For Office Use Only:

Final Action of Nonresident District: ☐ Approved ☐ Denied ☐ Lottery number _____

Reason for denial or comments: _____

Superintendent/Designee: _____ Date _____

9/05/14|PH

Oregon School Boards Association Selected Sample Policy

Code: **JECB-AR(4)**
Revised/Reviewed:

Application for Nonresident Student Admission – Interdistrict Transfer

Transfer requested for School Year _____

For Office Use Only

Student ID# _____

Student Information

Legal Last Name _____ Legal First Name _____ Legal Middle Name _____

Mailing Address _____ Apartment # _____

City _____ State _____ Zip _____

Date of Birth _____ (MM/DD/YY) Student Grade Level in [2014-2015] _____

Primary Phone of Parent/Guardian _____ Secondary Phone _____

E-mail Address _____

Parent/Guardian Name (Person in Parental Relationship) _____

Is the student currently under expulsion? ☐ Yes ☐ No

If yes, what was the reason? _____

[Is there a sibling of this applicant currently attending in this district? ☐ Yes ☐ No

If yes, name of sibling and school attending: _____]

[Does the student currently have a transfer for the 2013-2014 school year? ☐ Yes ☐ No]

Signature of Parent/Guardian _____ Date _____

For Office Use Only:

Final Action of Nonresident District: ☐ Approved ☐ Denied ☐ Lottery number _____

Reason for denial: _____

Superintendent/Designee: _____ Date _____

5/14/14|PH

Oregon School Boards Association Selected Sample Policy

Code: **JECB-AR(5)**
Revised/Reviewed:

Application for Nonresident Student Admission – Tuition Students

School Year _____

For Office Use Only

Student ID# _____

Nonresident District _____

Resident District _____

Student Information

Legal Last Name _____ Legal First Name _____ Legal Middle Name _____

Mailing Address _____ Apartment # _____

City _____ State _____ Zip _____

Date of Birth _____ (MM/DD/YY) Student Grade Level in [2014-2015] _____

Primary Phone of Parent/Guardian _____ Secondary Phone _____

Email Address _____

Parent/Guardian Name (Person in Parental Relationship) _____

Is the student currently under expulsion? ☐ Yes ☐ No

If yes, what was the reason? _____

If my child is admitted, I hereby authorize the release of the student educational records to _____
(name of district) and certify that I am the parent or guardian in legal custody of the student.

Signature of Parent/Guardian _____ Date _____

For Office Use Only:

Final Action of Nonresident District: ☐ Approved ☐ Denied

Reason for denial or comments: _____

Superintendent/Designee: _____ Date _____

9/05/14|PH

Oregon School Boards Association Selected Sample Policy

Code: **JECB-AR(6)**
Revised/Reviewed:

Request for Interdistrict Transfer Out of Resident District

School Year _____

For Office Use Only

Student ID# _____

Student Information

Legal Last Name _____ Legal First Name _____ Legal Middle Name _____

Mailing Address _____ Apt # _____

City _____ State _____ Zip _____

Date of Birth _____ (MM/DD/YY) Student Grade Level in [2014-2015] _____

Primary Phone of Parent/Guardian _____ Secondary Phone _____

E-mail address _____

Parent/Guardian Name (Person in Parental Relationship) _____

Signature of Parent/Guardian _____ Date _____

Granting the request does not guarantee acceptance to another district.

For Office Use Only:

Final Action of Resident District: ☐ Approved ☐ Denied

Reason for denial: _____

Superintendent/Designee: _____ Date _____

5/14/14|PH

Oregon School Boards Association Selected Sample Policy

Code: **JHCD**
Adopted:

~~Administering Noninjectable Medicines to Students~~ **Nonprescription Medication** **/*

The district recognizes that administering of **nonprescription** medication to students and/or self-medication may be necessary when the failure to take such medication ~~would jeopardize the health of the student or the student would not be able to attend school if medication was not made available during school hours,~~ would prevent the student from attending school. Consequently, students may be permitted to take ~~noninjectable prescription or~~ nonprescription medication at school, ~~on a temporary or regular basis.~~

The district reserves the right to reject a request to administer [or allow self administration of] a nonprescription medication when such medication is not necessary for the student to remain in school.

~~When directed by a physician or other licensed health care professional, students grades K-12 will be allowed to self-administer medication. A medical protocol regarding each student who self-administers medication will be developed, signed by a physician or other licensed health care professional [and parent] and kept on file. Permission for self-administered medication may be revoked at any time if the student violates policy or medical protocol.~~

~~All requests for the district to administer medication to a student shall be made by the parent in writing. Requests shall include the written instructions of the physician for the administration of a prescription medication to a student or the written instructions of the parent for the administration of a nonprescription medication to a student. A prescription label will be deemed sufficient to meet the requirements for written physician instructions.~~

[A request to the district to allow a student to self-medicate with a nonprescription medication shall include written permission and instruction from a parent or guardian, and shall include an assurance from the parent or guardian that the student has received appropriate instruction for its use.]

A request to the district to administer a nonprescription medication shall include written permission and instruction from a parent or guardian.

The district shall designate staff authorized to administer medication to students. Training shall be provided as required by law.

~~The district reserves the right to reject a request to administer prescription or nonprescription medication when such medication is not necessary for the student to remain in school.~~

This policy and administrative regulation shall not prohibit, in any way, the administration of recognized first aid to students by district employees in accordance with established state law, Board policy and procedures.

The superintendent shall develop administrative regulations as needed to meet the requirements of law, Oregon Administrative Rules and for the implementation of this policy. ~~Regulations will include provisions for student self-medication.~~

END OF POLICY

Legal Reference(s):

[ORS 109.640](#)

[ORS 339.866 to -339.871](#)

[ORS 339.867](#)

[ORS 339.869](#)

[ORS 339.870](#)

[ORS 433.800 to -433.830](#)

[ORS 475.005 to -475.285](#)

[OAR 166-400-0010\(17\)](#)

[OAR 166-400-0060\(29\)](#)

[OAR 581-021-0037](#)

[OAR 581-022-0705](#)

R10/23/14 | PH

Oregon School Boards Association Selected Sample Policy

Code: JHCD/JHCDA-AR
Revised/Reviewed:

Administering Noninjectable/Injectable Medicines to Students Prescription/Nonprescription Medication **/*

Students may, subject to the provisions of this regulation, have ~~noninjectable/injectable~~ prescription or nonprescription medication administered by designated, trained staff. Self-medication by students will ~~also~~ be permitted in accordance with this regulation and state law.

1. Definitions

- a. “Prescription medication” means any ~~noninjectable/injectable~~ drug, chemical compound, suspension or preparation in suitable form for use as a curative or remedial substance taken either internally or externally by a student under the written direction of a physician. Prescription medication includes any prescription for bronchodilators or autoinjectable epinephrine prescribed by a student’s Oregon licensed health care professional for asthma or severe allergies. Prescription medication does not include dietary food supplements.
- b. “Nonprescription medication” means only commercially prepared, nonalcohol-based medication to be taken at school that is necessary for the student to remain in school. This shall be limited to eye, nose and cough drops, cough suppressants, analgesics, decongestants, antihistamines, topical antibiotics, anti-inflammatories and antacids that do not require written or oral instructions from a physician. Nonprescription medication does not include dietary food supplements.
- c. “Physician” means a doctor of medicine or osteopathy, a physician assistant licensed to practice by the Board of Medical Examiners for the state of Oregon, a nurse practitioner with prescriptive authority licensed by the Oregon State Board of Nursing, a dentist licensed by the Board of Dentistry for the state of Oregon, an optometrist licensed by the Board of Optometry for the state of Oregon or a naturopathic physician licensed by the Board of Naturopathy for the state of Oregon.
- d. “Student self-medication” means a student must be able to administer medication to himself/herself without requiring a trained staff member to assist in the administration of the medication.
- e. “Age-appropriate guidelines” means the student must be able to demonstrate the ability, developmentally and behaviorally, to self-medicate with permission from parent ~~or~~ guardian, administrator and in the case of a prescription medication, a physician.
- f. “Training” means yearly instruction, by a qualified trainer, to be provided to designated staff on the administration of prescription and nonprescription medication, based on requirements set out in guidelines approved by the Oregon Department of Education (ODE), including discussion of applicable district policies, procedures and materials.
- g. “Qualified trainer” means a person who is familiar with the delivery of health services in a school setting and who is a registered nurse licensed by the Oregon State Board of Nursing, a physician, or a pharmacist licensed by the State Board of Pharmacy for the state of Oregon.

- h. “Severe allergy” means a life-threatening hypersensitivity to a specific substance such as food, pollen or dust.
- i. “Asthma” means a chronic inflammatory disorder of the airways that requires ongoing medical intervention.
- j. “Designated staff” means the staff person who is designated by the building principal to administer prescription or nonprescription medication.

2. Designated Staff/Training

- a. The principal will designate trained staff authorized to administer prescription or nonprescription medication to students within individual school buildings and while participating at school-sponsored activities on or off district property while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in before- or after-school care programs on school-owned property and in transit to or from school or school-sponsored activities. The principal will supervise and ensure building and activity practices and procedures are consistent with the requirements of law, rules and this regulation.
- b. The principal will ensure the training required by law and Oregon Administrative Rules is provided. Training must be conducted by a qualified trainer.
- c. Training will provide an overview of applicable provisions of Oregon law, administrative rules, district policy and administrative regulations and include, but not be limited to, the following: safe storage, handling, monitoring medication supplies, disposing of medications, record keeping and reporting of medication administration and errors in administration, emergency medical response for life-threatening side effects and allergic reactions, and student confidentiality. Materials as recommended and/or approved by the ODE will be used.
- d. Training will be provided yearly to designated staff authorized to administer medication to students.
- e. A copy of the district’s policy and administrative regulation will be provided to all staff authorized to administer medication to students and others, as appropriate.
- f. [A statement that the designated staff member has received the required training will be signed by the staff member and filed in the district office.]

3. Administering Premeasured Doses of Epinephrine to a Student or Other Individual

A premeasured dose of epinephrine may be administered by trained, designated district staff to any student or other individual on school premises who the personnel believe, in good faith, is experiencing a severe allergic reaction, regardless of whether the student or individual has a prescription for epinephrine.

4. Administering Medications to Students

- a. A Requests for designated staff to administer medication to a students may be approved by the district as follows and subject to the following:
 - (1) A written request for the district designated staff to administer prescription medication to a student, if because of the prescribed frequency for the medication, the medication must be given while the student is in school, at a school-sponsored activity, while under the supervision of school personnel, in before- or after-school care programs on school-

owned property and in transit to or from school or school-sponsored activities, must be submitted to the school office ~~to~~ and shall include:

- (a) The written signed permission of the parent or guardian;
- (b) The written instruction from the physician, physician assistant or nurse practitioner for the administration of the prescription medication to the student including:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) ~~Route~~ Method of administration;
 - (iv) Dosage;
 - (v) Frequency of administration; and
 - (vi) Other special instruction, if any.

The prescription label will be considered to meet this requirement if it contains the information listed in (a.i.)-(f.v.i.) above.

- (2) A written request for the district to administer nonprescription medication must be submitted to the school office ~~to~~ and shall include:

- (a) The written signed permission of the parent or guardian;
- (b) The written instruction from the parent or guardian for the administration of the nonprescription medication to the student including:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) ~~Route~~ Method of administration;
 - (iv) Dosage;
 - (v) Frequency of administration;
 - (vi) Other special instruction, if any.

- b. Medication is to be submitted in its original container;
- c. Medication is to be brought to and returned from the school by the parent;
- d. It is the parent's responsibility to ensure that an adequate amount of medication is on hand at the school for the duration of the student's need to take medication;
- e. It is the parent's responsibility to ensure that the school is informed in writing of any changes in medication instructions;
- f. In the event a student refuses medication, the parent will be notified immediately. No attempt will be made to administer medication to a student who refuses district-administered medication;
- g. Any error in administration of medication will be reported to the parent immediately [and documentation made on the district's Accident/Incident Report form]. Errors include, but are not limited to, administering medication to the wrong student, administering the wrong medication, dose, ~~time~~ frequency of administration, ~~route~~ method of administration, etc.;
- h. Medication shall not be administered or self-medication allowed until the necessary permission form and written instructions have been submitted as required by the district.

5. Student Self-medication of a Prescription [or Nonprescription] Medication

- a. Student Self-medication of prescription and nonprescription medication for by K-12 students, including students with asthma or severe allergies, will be allowed subject to the following:
- (1) A parent (or guardian) signed permission form and other documentation requested by the district must be submitted for self-medication of all prescription and nonprescription medications; In the case of prescription medications, permission from the physician or other licensed health care professional is also required. Such permission may be indicated on the prescription label.
 - (2) A prescription written by an Oregon licensed health care professional that includes A written treatment plan from a licensed health care professional for the managing of the student's asthma, diabetes and/or severe allergy, and will be required for use of medication by the student during school hours while the student is in school, at a school-sponsored activity, while under the supervision of school personnel, in before- or after-school care programs on school-owned property and in transit to or from school or school-sponsored activities, and acknowledgment the student has been instructed in the correct and responsible use of the medication;
 - (3) Principal permission is required for all self-medication of prescription medicine requests; is required.
- b. [Student self-medication of nonprescription medication by K-12 students may be allowed subject to the following:
- (1) A parent or guardian permission form and other documentation requested by the district must be submitted for self-medication of all nonprescription medications. The signed form from the parent or guardian will ensure the student has received proper instruction for use[;] [.]
 - (2) [[Principal] permission for all self-medication of nonprescription medicine requests is required.]]
- c. Students who are developmentally and/or behaviorally unable to self-medicate will be provided assistance by designated school staff. A permission form and written instructions will be required as provided in Section 34.a. and b. above;
- d. All prescription and nonprescription medication must be kept in its appropriately labeled, original container, as follows:
- (1) Prescription labels must specify the name of the student, name of the medication, dosage, route method of administration and frequency or time of administration and any other special instruction including student permission for the student to self-medicate;
 - (2) Nonprescription medication must have the student's name affixed to the original container.
- e. The student may have in his/her possession only the amount of medication needed for that school day, except for manufacture's packaging that contains multiple dosage, the student may carry one package, such as but not limited to, autoinjectable epinephrine or bronchodilators/inhalers;
- f. Sharing and/or borrowing of any medication with another student is strictly prohibited;

- g. [Any medication required for use longer than [10] school days will be permitted only upon the written request of the parent;]
- h. For students who have been prescribed bronchodilators or epinephrine, staff will request from the parent or guardian, that the parent or guardian provide backup medication for emergency use by that student. Backup medication, if provided by the parent or guardian, will be kept at the student's school in a location to which the student has immediate access in the event the student has an asthma and/or severe allergy emergency;
- i. Upon written parent request and with a physician's written statement that the lack of immediate access to a backup autoinjectable epinephrine may be life threatening to a student, and the location the school stores backup medication is not located in the student's classroom, a process shall be established to allow the backup autoinjectable epinephrine to be kept in a reasonably secure location in the student's classroom;
- j. Permission to self-medicate may be revoked if the student violates the Board's policies ~~JHCD – Administering Noninjectable Medicines to Student and JHCDA – Administering Injectable Medicines to Students~~ policy and/or these regulations. Additionally, students may be subject to discipline, up to and including expulsion, as appropriate.

6. Handling, Storage, Monitoring Medication Supplies

- a. Medication administered by designated staff ~~and~~ or self administered by the student, ~~medication~~ must be delivered by the parent to the school, in its original container, accompanied by the permission form and written instructions, as required above.
- b. Medication in capsule or tablet form and categorized as a sedative, stimulant, anticonvulsant, narcotic analgesic or psychotropic medication will be counted by designated staff in the presence of another district employee upon receipt, documented in the student's medication log and routinely monitored during storage and administration. Discrepancies will be reported to the principal immediately and documented in the student's medication log. For such medication not in capsule or tablet form, standard measuring and monitoring procedures will apply.
- c. Designated staff will follow the written instructions of the physician and parent and training guidelines as may be recommended by ODE for administering all forms of ~~noninjectable/injectable~~ prescription and/or nonprescription medications.
- d. Medication will be secured as follows:
 - (1) Nonrefrigerated medications will be stored in a locked cabinet, drawer or box [used solely for the storage of medication];
 - (2) Medications requiring refrigeration will be stored in a [locked box in a refrigerator] [separate refrigerator used solely for the storage of medication];
 - (3) Access to medication storage keys will be limited to the principal and designated school staff.
- e. Designated staff will be responsible for monitoring all medication supplies and for ensuring medication is secure at all times, not left unattended after administering and that the medication container is properly sealed and returned to storage.
- f. In the event medication is running low or an inadequate dosage is on hand to administer the medication, the designated staff will notify the parent immediately.

7. Emergency Response

- a. Designated staff will notify 911 or other appropriate emergency medical response systems and administer first aid, as necessary, in the event of life-threatening side effects that result from district-administered medication or from student self-medication **or allergic reactions**. The parent[, school nurse] and principal will be notified immediately.
- b. Minor adverse reactions that result from district-administered medication or from student self-medication will be reported to the parent immediately.

8. Disposal of Medications

- a. Medication not picked up by the parent at the end of the school year or within [five] school days of the end of the medication period, whichever is earlier, will be disposed of by designated staff in a nonrecoverable fashion as follows:
 - (1) Medication in capsule, tablet and liquid form will be removed from their original container (destroy any personal information). Crush solid medications, mix or dissolve in water (this applies to liquid as well) and mix with an undesirable substance such as coffee grounds, kitty litter, flour etc., and place it in impermeable non-descriptive containers such as empty cans or sealable bags, placing these containers in the trash. Flush prescriptions down the toilet **only** if the accompanying patient information specifically instructs it is safe to do so ~~(ONDCP Federal Government Guidelines February 20, 2007);~~
 - (2) Other medication will be disposed of in accordance with established training procedures including sharps and glass.
- b. All medication will be disposed of by designated staff in the presence of another school employee and documented as described in ~~89~~ a., below.

9. Documentation and Record Keeping

- a. A medication log will be maintained for each student administered medication by the district. The medication log will include, but not be limited to:
 - (1) The name, dose and route of medication administered, date, time of administration and name of the person administering the medication;
 - (2) Student refusals of medication;
 - (3) Errors in administration of medication¹;
 - (4) Emergency and minor adverse reaction incidents¹;
 - (5) Discrepancies in medication supply;
 - (6) Disposal of medication including date, quantity, manner in which the medication was destroyed and the signature of the staff involved.
- b. All records relating to administration of medicines, including permission slips and written instructions, will be maintained in a separate medical file apart from the student's education

¹Designated staff may note incident by symbol in medication log and attach detailed documentation as necessary.

records file unless otherwise related to the student's educational placement and/or individualized education program. Records will be retained in accordance with applicable provisions of OAR 166-400-0010(17) and OAR 166-400-0060(29).

- c. Student medical files will be kept confidential. Access shall be limited to those designated school staff authorized to administer medication to students, the student and his/her parents. Information may be shared with staff with a legitimate educational interest in the student or others as may be authorized by the parent in writing.

A school administrator, teacher or other district employee designated by the school administrator is not liable in a criminal action or for civil damages as a result of the administration of prescription and/or nonprescription medication as per ~~ORS 339.870~~ state law.

A school administrator, school nurse, teacher or other district employee designated by the school administrator, ~~the school district and members of the district board~~, are not liable in a criminal action or for civil damages as a result of a student's use of self-administration of medication, when that person in good faith assisted the student in self-administration of the medication, as per state law.

A school administrator, school nurse, teacher or other district employee are not liable in a criminal action or for civil damages, when in good faith administers autoinjectable epinephrine to a student or other individual with a severe allergy, who is unable to self administer the medication, as per state law.

A school district and the members of a school district board are not liable in a criminal action or for civil damages when a student or individual is unable to self-administer medication, when any person in good faith administers autoinjectable epinephrine to a student or individual, as per state law.

R10/23/14 | PH

Oregon School Boards Association Selected Sample Policy

Code: JHCDA
Adopted:

~~Administering Injectable Medicines to Students~~ Prescription Medication **/*

The district recognizes a need to ensure the health and well-being of students who require regular ~~injections~~ doses or injections of medication as a result of experiencing an severe allergic reaction or have a need to manage hypoglycemia, asthma or diabetes. ~~Therefore, in situations w~~ When a licensed health care professional is not immediately available, a designated trained staff member may administer to a students, ~~by means of injection,~~ epinephrine, glucagon or other medications as prescribed and allowed by Oregon law (OAR 851-047-0030).

When directed by a physician or other licensed health care professional, students in grades K-12 will be allowed to self-administer medication, including medication for asthma or severe allergy as defined by state law.

A ~~medical protocol regarding each~~ written treatment plan for a student who self administers injectable medication will be developed, and signed by a physician or other Oregon licensed health care professional ~~[and parent]~~ and kept on file. ~~Permission for self-administered medication may be revoked if the student violates policy or medical protocol.~~ A written request and permission form signed by a parent or guardian is required and will be kept on file. If the student is deemed to have violated Board policy or medical protocol by the district, the district may revoke the permission given to a student to self-administer medication.

All requests for the district to administer injectable prescription medication to a student shall ~~be made by the parent in writing~~ include the written permission of the parent or guardian. ~~Requests and shall be accompanied by the physician's order for administering epinephrine, glucagon, or other medication as allowed by law~~ by written instruction from a physician, physician assistant or nurse practitioner. A prescription label prepared by a pharmacist will be deemed sufficient to meet the requirements for a physician's order ~~for epinephrine, glucagon or other medication.~~

The district reserves the right to reject a request to administer or allow self administration of a medication when such medication is not necessary for the student to remain in school.

A premeasured dose of epinephrine may be administered by designated, trained district staff to any student or other individual on school premises who the personnel believe, in good faith, is experiencing a severe allergic reaction, regardless of whether the student or individual has a prescription for epinephrine.

A process shall be established by which, upon parent written request, a backup prescribed autoinjectable epinephrine ~~be is~~ kept at a reasonable, secured location in the student's classroom ~~as provided by state law.~~

~~The district may designate staff authorized to administer epinephrine and glucagon or other medication as allowed under Oregon law.~~ Training shall be provided to designated staff as required by law in accordance with approved protocols as established by Oregon Department of Human Services, Health

Services the Oregon Health Authority. Staff designated to receive training shall also receive bloodborne pathogens training. A current first-aid and CPR card will also be required.

Injectable Prescription medication will be handled, stored, monitored, disposed of and records maintained in accordance with established district regulations governing administering noninjectable/ or injectable, or prescription or nonprescription medicines to students including procedures for the disposal of sharps and glass.

The superintendent will ensure student health management plans are developed as required by training protocols, maintained on file and pertinent health information is provided to district staff as appropriate.

Such plans will include provisions for administering medication and/or responding to emergency situations including those occurring during curricular and extracurricular activities held after regular school hours and on or off district property while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in before- or after-school care programs on school-owned property and in transit to or from school or school-sponsored activities.

This policy and administrative regulation shall not prohibit, in any way, the administration of recognized first aid to students by district employees in accordance with established state law, Board policy and procedures.

END OF POLICY

Legal Reference(s):

[ORS 109.640](#)
[ORS 339.866 to -339.871](#)
[ORS 339.866](#)
[ORS 339.870](#)
[ORS 339.871](#)

[ORS 433.800 to -433.830](#)
[ORS 475.005 to -475.285](#)

[OAR 166-400-0010\(17\)](#)
[OAR 166-400-0060\(29\)](#)

[OAR 333-055-0000 to -0035](#)
[OAR 581-021-0037](#)
[OAR 581-022-0705](#)
[OAR 851-047-0030](#)
[OAR 851-047-0040](#)

Oregon School Boards Association Selected Sample Policy

Code: **KL**
Adopted:

Public Complaints* (Version 5)

Board members recognize that complaints about schools will be voiced by employees, students and patrons from time-to-time. When such complaints are made to a Board member, he/she shall refer the person making the complaint to the appropriate administrator. A Board member shall not attempt to consider such complaints in any official capacity acting as an individual Board member.

If the person making the complaint does discuss the matter with the appropriate administrator, that administrator shall attempt to resolve the complaint or identify the reasons for not resolving the issue. ~~A Board member shall not attempt to consider such complaints in any official capacity acting as an individual Board member.~~

In the event a complaint is not resolved within [10] working days at the building level, the person complainant may file a formal, written complaint with the superintendent. The superintendent will attempt to resolve the complaint. If the complaint remains unresolved within [10] working days of receipt by the superintendent of the written complaint, the patron complainant may request to place the complaint on the Board agenda at the next regularly scheduled Board meeting. Any written complaint bearing the signature of a district patron, which is presented to the Board, may be considered by the entire Board. A final determination shall be made within [20] working days from receipt of the complaint by the Board.

Complaints alleging violation of standards for public elementary and secondary schools shall be made in writing and presented to the superintendent.

In the event that a complaint alleges a violation of state standards and is not resolved at the Board level, then the district will supply the complainant with appropriate information in order to file a direct appeal to the State Superintendent of Public Instruction as outlined in Oregon Administrative Rules.

END OF POLICY

Legal Reference(s):

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

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

Anderson v. Central Point Sch. Dist., 746 F.2d 505 (9th Cir. 1984).
Connick v. Myers, 461 U.S. 138 (1983).

Oregon School Boards Association Selected Sample Policy

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

Public Complaint Procedure (Version 3)

Initiating a Complaint: Step One

Any member of the public who wishes to express a complaint should discuss the matter with the school employee involved (~~teacher, counselor, assistant principal, secretary, etc.~~). It is the intent of the district to solve problems and address all complaints as close as possible to their origin.

The Administrator: Step Two

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

The Superintendent: Step Three

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

The superintendent shall investigate the complaint, confer with the complainant and the parties involved and prepare a written report of his/her findings and his/her conclusion within [10] working days after receiving the written complaint. ~~(Approximately one week in most cases will be required.)~~

The Board: Step Four

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

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

The complainant shall be informed of the Board's decision within [20] working days from the hearing of the appeal by the Board.

~~Superintendent of Public Instruction: Step Five~~

~~Persons may, after exhausting local complaint procedures, appeal in writing to the Superintendent of Public Instruction.~~

Lowell School District
COMPLAINT FORM

TO: _____ Name of School _____

Person Making Complaint _____

Telephone Number _____ Date _____

Nature of Complaint _____

Suggested Correction _____

Office Use: Disposition of Complaint: _____

Signature: _____ Date: _____

cc: District Office

Oregon School Boards Association Selected Sample Policy

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

Public Complaints – Athletic Complaint Procedure

Complainant's Name _____ Date _____

Sport _____

1. Describe your complaint.
2. Describe the problem that led to the complaint.
3. What steps have been taken to resolve the problem?
4. What adjustment is sought?

Signature of person initiating the complaint

Date

Signature of athletic director or coach

Date

Submitted to the principal for review on _____ (Date)

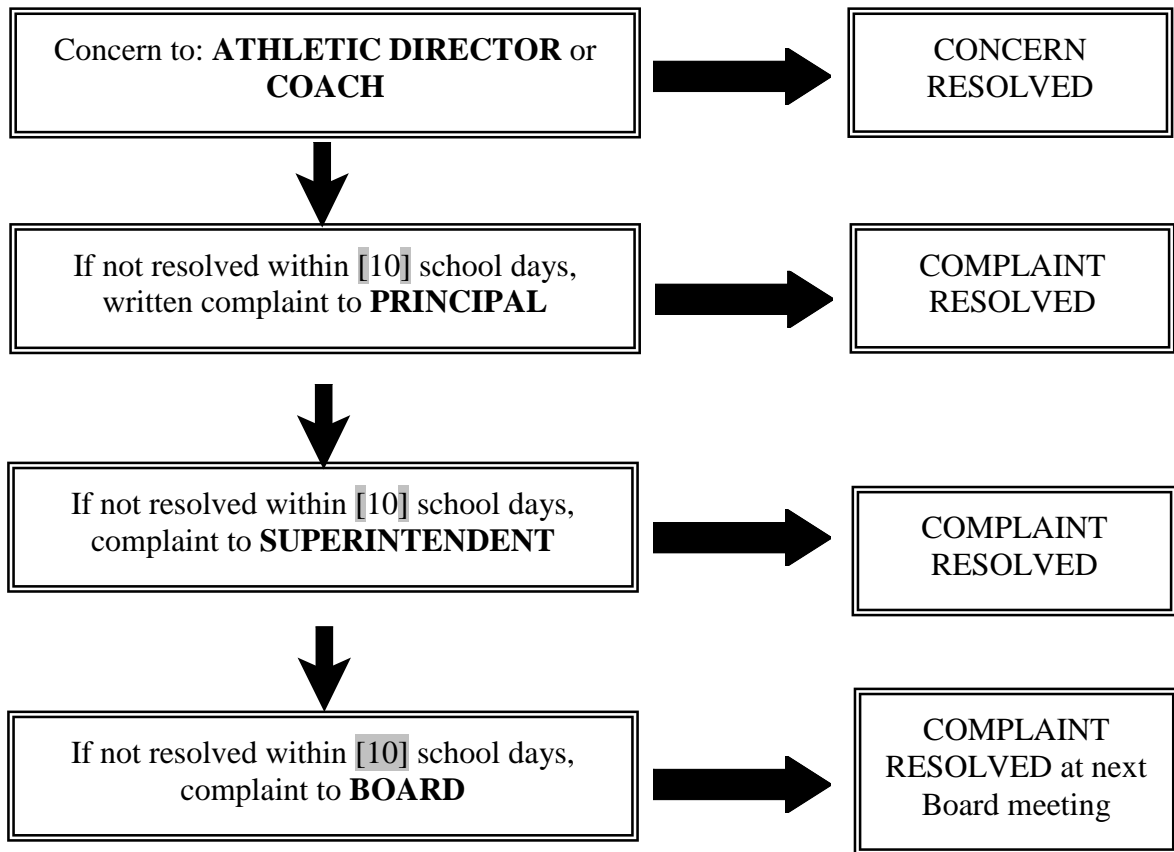
Principal's Recommendation: _____

Signature of principal

Date

Submitted to superintendent if not resolved at site _____ (Date)

ATHLETIC COMPLAINT PROCEDURE FLOW CHART



The flow chart above provides procedure for the handling of a patron athletic concerns in an orderly, timely and effective manner. As indicated, any patron who has a concern or complaint should: (1) take the concern directly to either the coach or the athletic director where the concern may be resolved; (2) if the concern is not resolved at step one with either the coach or the athletic director, the athletic director will assist the patron in completing the formal complaint. From this point on, the procedure is outlined in Board policy KL - Public Complaints.

Oregon School Boards Association Selected Sample Policy

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

Review of Administrative Decision

This form is to be used to request a review by the Board of an administrative decision or an interpretation of a procedure, policy or administrative regulation.

Submitted by: _____ Telephone: _____

Address: _____

State the decision, procedure, administrative regulation or policy questioned: _____

Describe in detail (use other pages as necessary) the nature of or reasons for concern:

Requested changes or suggested resolutions of the problem:

NOTE: You are invited to appear to personally address the Board or you may choose to submit only your written statement. You will be advised in writing of the Board's decision within [20] working days after the Board has heard the complaint.

I wish to appear before the Board: ☐ Yes ☐ No

Signature: _____ Date: _____

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Oregon School Boards Association Selected Sample Policy

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

Public Complaint Procedure *(New Version 2)*

The following procedure will be used for all **other** complaints:

1. A student or parent with a complaint shall generally first present it orally and informally to his/her teacher or the appropriate school employee;
2. If the complaint is not resolved, the complainant may formally present the complaint in writing (including all supporting statements and evidence) within [10] working days of the informal conference to the principal. The principal shall evaluate the evidence and render a decision within [five] working days after receiving the complaint;
3. If the complainant deems it desirable to carry the complaint beyond the decision reached by the principal, he/she may, within [five] working days, file the complaint with the superintendent or his/her designee. The superintendent or his/her designee shall evaluate the evidence and render a decision within [five] working days after receiving the appeal;
4. If the complainant deems it desirable to carry the complaint beyond the decision reached by the superintendent or his/her designee, he/she may within [five] working days request a review by the Board at its next regularly scheduled meeting. A final determination shall be made within [20] working days from receipt of the appeal by the Board;
5. Persons may, after exhausting local complaint procedures, appeal in writing to the Superintendent of Public Instruction.

Time

The number of days given at each level shall be regarded as a maximum and every effort will be made to expedite the process. The time limits stated may be extended by mutual agreement of the complainant and the administration.

Withdrawal

A complaint may be withdrawn by the complainant at any level without prejudice, reprisal or record.

Meetings and Decisions

At each of the levels the complainant shall be given the opportunity to be present and to be heard. All decisions at each level shall be in writing and include supporting rationale with the exception of the initial informal contact. Copies of all decisions and recommendations shall be furnished promptly to all parties of interest.

Suggestion, Complaint or Commendation Regarding an Employee, Program or Practice

The district is interested in suggestions, complaints and commendations involving employees or programs. When such is registered, we are interested in investigating the incident to see if there has been a misunderstanding or if some corrective action should be taken to improve the district. Commendations are of value to the district because they improve morale and encourage district employees to take pride in their work and do more than is ordinarily expected of them.

As both complaints and commendations are of value to the district, we welcome comments and request you fill in the information requested below.

Name of Employee/Program

Date of Suggestion, Complaint or Commendation

Nature of Suggestion, Complaint or Commendation: _____

Source of your information: _____

Justification of your feelings: _____

Remedy sought: _____

I have read the above but do not necessarily agree.

Signature: _____ Date: _____

Employee: _____ Date: _____

Address: _____

Immediate Supervisor: _____ Phone: _____ Date: _____

10/23/14 | PH

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 ~~{180 days prior to the proposed starting date}~~ [by March 31] ~~{insert district’s identified date}~~¹.

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)~~(y). A good faith determination of incompleteness is not a denial for purposes of requesting state board review under ORS 338.075;
- (27) In addition to the minimum requirements enumerated in ORS 338.045 (2)(a) - ~~(x)~~(y), the district, under ORS 338.045 (3), may require the applicant to submit any of the following information as necessary to add detail or clarity to the minimum requirements or that the Board considers relevant to the formation or operation of the public charter school:
 - (a) Curriculum, Instruction and Assessment
 - (i) [Description of a curriculum for each grade of students, which demonstrates in detail alignment with Oregon's academic content standards;
 - (ii) Description of instructional goals in relationship to Oregon's academic content standards and benchmarks;
 - (iii) A planned course statement for courses taught in the program, including related content standards, course criteria, assessment practices and state required work samples that will be collected;
 - (iv) Documentation that reflects consideration of credits for public charter school course work a student may perform at any other public school;
 - (v) Explanation of grading practices for all classes and how student performance is documented;
 - (vi) Explanation of how the proposed academic program will be aligned with that of the district. (If an applicant is proposing an elementary level public charter school, please describe how the curriculum is aligned at each grade level with the district's curriculum, including an explanation of how a student in the public charter school will be adequately prepared to re-enter the district's public school system after completing the charter school's program.);
 - (vii) Description of the student assessment system, including how student academic progress will be measured at each grade level and any specific assessment instruments that will be used;

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

(b) State and Federal Mandates/Special Education

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

- (viii) Explanation of how the public charter school will work with the district to manage IDEA 2004 mandates regarding eligibility, 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~~ 30 days. The Board may, with good cause, request an extension in the approval process timelines from the State Board of Education.

4. Terms of the Charter Agreement

- a. Upon Board approval of the proposal, the Board will become the sponsor of the public charter school. The district and the applicant must develop a written charter agreement, subject to Board approval, which shall act as the legal authorization for the establishment of the public charter school.
- b. The charter agreement shall be legally binding and must be in effect for a period of not more than five years but may be renewed by the district.
- c. The district and the public charter school may amend a charter agreement through joint agreement.
- d. It is the intent of the Board that the charter agreement be detailed and specific to protect the mutual interests of the public charter school and the district. The agreement shall incorporate the elements of the approved proposal and will address additional matters, statutes and rules not fully covered by law or the proposal that shall apply to the public charter school including, but not limited to, the following:
 - (1) [Sexual harassment (ORS 342.700, 342.704);]
 - (2) [Pregnant and parenting students (ORS 336.640);]
 - (3) [Special English classes for certain children (ORS 336.079);]
 - (4) [Student conduct (ORS 339.250);]
 - (5) [Alcohol and drug abuse program (ORS 336.222);]
 - (6) [Student records (ORS 326.565);]
 - (7) [Oregon Report Card (ORS 329.115);]
 - (8) [Recovery of costs associated with property damage (ORS 339.270);]
 - (9) [Use of school facilities (ORS 332.172);]
 - (10) Employment status of public charter school employees:
 - (a) Public charter school law requires the following:
 - (i) Employee assignment to a public charter school shall be voluntary;
 - (ii) A public charter school or the sponsor of the public charter school may be considered the employer of any employees of the public charter school;
 - (iii) If the Board is not the sponsor of the public charter school, it shall not be the employer and shall not collectively bargain with the employees;

- (iv) A public charter school employee may be a member of a labor organization or organize with other employees to bargain collectively. The bargaining unit may be separate from other bargaining units of the district;
 - (v) The public charter school governing body shall control the selection of employees at the public charter school;
 - (vi) The Board shall grant a leave of absence to any employee who chooses to work in the public charter school. The length and terms of the leave of absence shall be set by collective bargaining agreement or by Board policy; however, the length of leave of absence may not be less than two years unless:
 - 1) The charter of the public school is terminated or the public charter school is dissolved or closed during the leave of absence; or
 - 2) The employee and the Board have mutually agreed to a different length of time.
 - (vii) An employee of a public charter school operating within the district who is granted a leave of absence and returns to employment with the district shall retain seniority and benefits as an employee, pursuant to the terms of the leave of absence.
- (b) The terms and conditions of employment addressed in the agreement may include, but not limited to, the following provisions:
- (i) A proposed plan for the placement of teachers and other school employees upon termination or nonrenewal of the charter;
 - (ii) Arrangements for employees who choose not to be employed or participate in the public charter school, if a district school has been converted to a public charter school;
 - (iii) [Salary for professional staff or wages for classified staff;]
 - (iv) [Health benefits;]
 - (v) [Leaves, including timing, commencement and duration of leave; voluntary and involuntary termination and return to work; whether the leave is paid or unpaid; and a description of benefits upon termination of leave (i.e., same, similar or available position and salary schedule placement);]
 - (vi) [Work year;]
 - (vii) [Working hours;]
 - (viii) [Discipline and dismissal procedures;]
 - (ix) [Arrangements to secure substitutes;]
 - (x) [Arrangements to ensure that 50 percent of the total full-time equivalent teaching and administrative staff are licensed;]
 - (xi) [Hiring practices;]
 - (xii) [Evaluation procedures.]

- (11) Student enrollment, application procedures and whether the public charter school will admit nonresident students and on what basis:
- (a) Public charter school law requires the following:
 - (i) Student enrollment shall be voluntary. If the number of applicants exceeds the capacity, students shall be selected through a lottery process. [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) [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) ORS 192.410 to 192.505 (Public Records Law);
 - (3) ORS 192.610 to 192.690 (Public Meetings Law);
 - (4) ORS Chapters 279A, 279B and 279C (Public Contracting Code);
 - (5) ORS 326.565, 326.575 and 326.580 (student records);
 - (6) ORS 297.405 to 297.555 and 297.990 (Municipal Audit Law);
 - (7) ORS 181.534, 326.603, 326.607, 342.223 and 342.232 (criminal records checks);
 - (8) ORS 337.150 (textbooks);
 - (9) ORS 339.119 (considerations for educational services);
 - (10) ORS 336.840 (use of personal electronic devices);
 - (11) ORS 339.141, 339.147 and 339.155 (tuition and fees);
 - (12) ORS 659.850, 659.855 and 659.860 (discrimination);
 - (13) ORS 30.260 to 30.300 (tort claims);
 - (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) ORS 329.045 (academic content standards and instruction);
 - (19) Any statute or rule that establishes requirements for instructional time;
 - (20) ORS 339.250 (12) (prohibition of infliction of corporal punishment);
 - (21) ORS 339.370, 339.372, 339.388 and 339.400 (reporting of suspected abuse of a child and sexual conduct, and training on prevention and identification of abuse and sexual conduct);
 - (22) ORS 329.451 (diploma, modified diploma, extended diploma and alternative certificate standards);
 - (23) Statutes and rules that expressly apply to public charter schools;
 - (24) Statutes and rules that apply to special government body as defined in ORS 174.117, or public body as defined in 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:~~ Failure to maintain, for two or more consecutive years, a sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter under ORS 338.065;
 - (7) Failure to maintain the health and safety of the students.
- b. If a public charter school is terminated by the Board for any reason listed in sections a. (1) through a. (7), the following shall occur:
- (1) The district shall give the public charter school a 60-day written notification of its decision;
 - (2) If the grounds for termination include failure to maintain financial stability or failure to maintain a sound financial management system, the sponsor and the public charter school may agree to develop a plan to correct deficiencies. The plan to correct deficiencies will follow the process as per ORS 338.105;
 - (3) The district shall state the grounds for termination and deliver notification to the business office of the public charter school;
 - (4) The public charter school may request a hearing by the district. The request must be made in writing and delivered to the business address of the sponsor;
 - (5) Within 30 days of receiving the request for a hearing, the sponsor must provide the public charter school with the opportunity for a hearing on the proposed termination;
 - (6) The public charter school may appeal the decision to terminate to the State Board of Education;
 - (7) If the public charter school appeals the decision to terminate to the State Board of Education, the public charter school will remain open until the State Board issues its final order;
 - (8) If the State Board's final order upholds the decision to terminate and at least 60 days have passed since the notice of intent to terminate was received by the public charter school, the district's sponsorship of the public charter school will terminate;
 - (9) The final order of the State Board may be appealed under the provision of ORS 183.484;
 - (10) Throughout the ORS 183.484 judicial appeals process the public charter school shall remain closed;
 - (11) If terminated or dissolved, assets of the public charter school purchased by the public charter school with public funds, shall be given to the State Board of Education.
- c. If the public charter school is terminated by the Board for any reason related to student health or safety as provided in section a. (7), the following shall occur:
- (1) If the district reasonably believes that a public charter school is endangering the health or safety of the students enrolled in the public charter school, the district may act to immediately terminate the approved charter and close the public charter school without providing the notice required in section b. (1);
 - (2) A public charter school closed due to health or safety concerns may request a hearing by the sponsor. Such a request must be made in writing and delivered to the business address of the district;
 - (3) Within 10 days of receiving the request for a hearing, the district must provide the public charter school with the opportunity for a hearing on the termination;
 - (4) If the district acts to terminate the charter following the hearing, the public charter school may appeal the decision to the State Board of Education;
 - (5) The State Board will hold a hearing on the appeal within 10 days of receiving the request;

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

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

10. District Immunity

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

Master Facility Improvement Plan

Total Financial Commitment

Trade Assignment Responsibility: M = Maintenance, C = Contractor, P = Painting, G = Grounds, M/T = Maintenance/Technology, Business Office

Priority	Description of Issue	Estimated Budget	Funding Source	Trade Area
0	Install new benches in locker rooms and paint existing benches that are not removed	3,000	Annual Budget	M
1	Repair roof in wrestling building	1,500	Annual Budget	C
1	Renovate Lowell Gym Concession Stand	1,000	Annual Budget	C
1	Extend Trophy Cases at Lowell High to cover empty slots (Woodshop Project ?)	500	Annual Budget	M
1	Renovate AD's Office and Shift Nathan and AD's Offices to Create a Clean and Professional Locker Room for Officials and Pat Todd	500	Annual Budget	M
1	Place or Sale Basketball Backboard that are on Lundy Stage	500	Annual Budget	M
1	Complete the installation of Cameras in both Schools	3,000	Annual Budget	T
2	Renovate Lowell Outside Concession Stand - Install new window serving windows in LHS Outside Concession Stand. Remove Concession Stand Windows and Replace with Wooden Shutters	1,000	Annual Budget	C
2	Extend lunch room cabinets by door at Lundy	1,500	Annual Budget	M
2	Remove cabinets in Lowell High Cafeteria prior to painting	500	Annual Budget	M
2	Remove Gazebo by high school football field	250	Annual Budget	M
3	Purchase new rolling office chairs in Lowell Computer Lab	2,000	Annual Budget	B

4	Office and Front Door Security System at Both Schools	5,000	Bond Funding	C
3	Construct 2 MVA Classrooms, and Two Preschool Classrooms at Lundy	750,000	Bond Funding	C
4	Install Drop Ceiling in Lundy Classrooms	50,000	Bond Funding	C
4	Replace stairs leading out to shop and old weight room	25,000	Bond Funding	C
4	Remove asbestos tiles and replace flooring at Lowell High School	200,000	Bond Funding	C
4	Build Community Center and Performing Arts Venue – Joint City and District Possible Project	4,000,000	Bond Funding	C
4	Build a New Gym and Use Old Gym as Wrestling Room, and Convert Wrestling Room to Weight Room	3,000,000	Bond Funding	C
4	Construct 4 additional classrooms at Lowell High	750,000	Bond Funding	C
4	Renovate Drainage Under LHS Music Room and Cafeteria	25,000	Bond Funding	C
4	Renovate or Replace Portable Buildings (2 Classrooms)	250,000	Bond Funding	C
4	Replace all lockers in Lowell High and Lundy	25,000	Bond Funding	C
4	Replace flooring on steps at Lowell High, including North entrance, locker rooms and weight room.	2,500	Bond Funding	C
4	Research and implement solution that would create modernized ventilation at LHS Gym	10,000	Bond Funding	M
0	Install Driveway and Food Service Area at Lundy Elementary and install combination walk-in and waste disposal equipment	274,000	Food Service Funding	C
1	Purchase Electric Sign for Front of Lowell High	15,000	Foundation	B
1	Resurface Track at Lowell High	5,000	Foundation	C
1	Replace curtains on stage	5,000	Foundation	C
1	Landscape Front of Lundy Elementary	4,000	Foundation	G
4	Install Sprinter Track at Lundy Elementary	30,000	Foundation	C

0	Purchase 2 Cafeteria Tables for Lundy and New Tables and Chairs for LHS Cafeteria	5,000	General Fund Reserves	B
1	Lundy Boiler Boom roof needs to be replaced	1,000	General Fund Reserves	C
1	Grade and build sidewalk area between wrestling room, classrooms, and gym entrance	30,000	General Fund Reserves	C
1	Woodshop Roof Needs Replacing, including the removal of the cement overhang roof.	8,000	General Fund Reserves	C
1	Repair, replace fence around the baseball diamond	3,500	General Fund Reserves	C
1	Replace Announcers Booth and Install Retaining Wall and New Fencing Along Football Field, including Announcers Booth	20,000	General Fund Reserves	C
1	Replace broken wood and fixtures in Lundy Gym prior to painting	4,000	General Fund Reserves	M
1	Boiler Rooms Pipe and Trap Renovation for Both School Sites	3,000	General Fund Reserves	M
1	Paint kitchen in Cafeteria at Lundy	2,000	General Fund Reserves	p
1	Paint Kitchen in Cafeteria at Lowell High	2,000	General Fund Reserves	P
1	Paint Lowell High Classrooms	3,000	General Fund Reserves	P
2	Install Roofs over the LHS Locker Rooms	10,000	General Fund Reserves	C
2	Resurface all asphalt surfaces	100,000	General Fund Reserves	C

2	Remove higher portion of the Chimney at LHS Gym	2,500	General Fund Reserves	C
2	Replace electric heaters in North Wing of LHS with H/VAC Units	25,000	General Fund Reserves	C
2	Resurface LHS Football Field	5,000	General Fund Reserves	G
2	Paint Lundy Gym	3,000	General Fund Reserves	P
3	Install sprinkler system for LHS Football Field	30,000	General Fund Reserves	G
3	Remove and/or repair Brick Chimney at Lundy	2,000	General Fund Reserves	C
3	Replace and improve the Lake Water Pump System to the School	3,500	General Fund Reserves	C
3	Replace Roof on LHS Gym	20,000	General Fund Reserves	C
3	Fix flooring in Room 12	2,000	General Fund Reserves	C
3	Paint and improve Bus Garage and Shop Areas to be More Professional in Appearance	10,000	General Fund Reserves	C
4	Air Conditioning in all Classrooms	250,000	General Fund Reserves	B
1	Paint the Exterior of the Rental Properties	10,000	Rental Fund Reserves	P
		9,995,250		

Master Facility Improvement Plan

By Funding Source (December 15, 2014)

Trade Assignment Responsibility: M = Maintenance, C = Contractor, P = Painting, G = Grounds, M/T = Maintenance/Technology, Business Office

Priority	Description of Issue	Estimated Budget	Funding Source	Trade Area
0	Install new benches in locker rooms and paint existing benches that are not removed	3,000	Annual Budget	M
1	Repair roof in wrestling building	1,500	Annual Budget	C
1	Renovate Lowell Gym Concession Stand	1,000	Annual Budget	C
1	Extend Trophy Cases at Lowell High to cover empty slots (Woodshop Project ?)	500	Annual Budget	M
1	Renovate AD's Office and Shift Nathan and AD's Offices to Create a Clean and Professional Locker Room for Officials and Pat Todd	500	Annual Budget	M
1	Place or Sale Basketball Backboard that are on Lundy Stage	500	Annual Budget	M
1	Complete the installation of Cameras in both Schools	3,000	Annual Budget	T
2	Renovate Lowell Outside Concession Stand - Install new window serving windows in LHS Outside Concession Stand. Remove Concession Stand Windows and Replace with Wooden Shutters	1,000	Annual Budget	C
2	Extend lunch room cabinets by door at Lundy	1,500	Annual Budget	M
2	Remove cabinets in Lowell High Cafeteria prior to painting	500	Annual Budget	M
2	Remove Gazebo by high school football field	250	Annual Budget	M
3	Purchase new rolling office chairs in Lowell Computer Lab	2,000	Annual Budget	B
		15,250		

4	Office and Front Door Security System at Both Schools	5,000	Bond Funding	C
3	Construct 2 MVA Classrooms, and Two Preschool Classrooms at Lundy	750,000	Bond Funding	C
4	Install Drop Ceiling in Lundy Classrooms	50,000	Bond Funding	C
4	Replace stairs leading out to shop and old weight room	25,000	Bond Funding	C
4	Remove asbestos tiles and replace flooring at Lowell High School	200,000	Bond Funding	C
4	Build Community Center and Performing Arts Venue – Joint City and District Possible Project	4,000,000	Bond Funding	C
4	Build a New Gym and Use Old Gym as Wrestling Room, and Convert Wrestling Room to Weight Room	3,000,000	Bond Funding	C
4	Construct 4 additional classrooms at Lowell High	750,000	Bond Funding	C
4	Renovate Drainage Under LHS Music Room and Cafeteria	25,000	Bond Funding	C
4	Renovate or Replace Portable Buildings (2 Classrooms)	250,000	Bond Funding	C
4	Replace all lockers in Lowell High and Lundy	25,000	Bond Funding	C
4	Replace flooring on steps at Lowell High, including North entrance, locker rooms and weight room.	2,500	Bond Funding	C
4	Research and implement solution that would create modernized ventilation at LHS Gym	10,000	Bond Funding	M
		9,123,000		

0	Install Driveway and Food Service Area at Lundy Elementary and install combination walk-in and waste disposal equipment	274,000	Food Service Funding	C
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1	Purchase Electric Sign for Front of Lowell High	15,000	Foundation	B
1	Resurface Track at Lowell High	5,000	Foundation	C
1	Replace curtains on stage	5,000	Foundation	C
1	Landscape Front of Lundy Elementary	4,000	Foundation	G
4	Install Sprinter Track at Lundy Elementary	30,000	Foundation	C
		59,000		

0	Purchase 2 Cafeteria Tables for Lundy and New Tables and Chairs for LHS Cafeteria	5,000	General Fund Reserves	B
1	Lundy Boiler Boom roof needs to be replaced	1,000	General Fund Reserves	C
1	Grade and build sidewalk area between wrestling room, classrooms, and gym entrance	30,000	General Fund Reserves	C
1	Woodshop Roof Needs Replacing, including the removal of the cement overhang roof.	8,000	General Fund Reserves	C
1	Repair, replace fence around the baseball diamond	3,500	General Fund Reserves	C
1	Replace Announcers Booth and Install Retaining Wall and New Fencing Along Football Field, including Announcers Booth	20,000	General Fund Reserves	C
1	Replace broken wood and fixtures in Lundy Gym prior to painting	4,000	General Fund Reserves	M
1	Boiler Rooms Pipe and Trap Renovation for Both School Sites	3,000	General Fund Reserves	M

1	Paint kitchen in Cafeteria at Lundy	2,000	General Fund Reserves	p
1	Paint Kitchen in Cafeteria at Lowell High	2,000	General Fund Reserves	P
1	Paint Lowell High Classrooms	3,000	General Fund Reserves	P
2	Install Roofs over the LHS Locker Rooms	10,000	General Fund Reserves	C
2	Resurface all asphalt surfaces	100,000	General Fund Reserves	C
2	Remove higher portion of the Chimney at LHS Gym	2,500	General Fund Reserves	C
2	Replace electric heaters in North Wing of LHS with H/VAC Units	25,000	General Fund Reserves	C
2	Resurface LHS Football Field	5,000	General Fund Reserves	G
2	Paint Lundy Gym	3,000	General Fund Reserves	P
3	Install sprinkler system for LHS Football Field	30,000	General Fund Reserves	G
3	Remove and/or repair Brick Chimney at Lundy	2,000	General Fund Reserves	C
3	Replace and improve the Lake Water Pump System to the School	3,500	General Fund Reserves	C
3	Replace Roof on LHS Gym	20,000	General Fund Reserves	C

3	Fix flooring in Room 12	2,000	General Fund Reserves	C
3	Paint and improve Bus Garage and Shop Areas to be More Professional in Appearance	10,000	General Fund Reserves	C
4	Air Conditioning in all Classrooms	250,000	General Fund Reserves	B
1	Paint the Exterior of the Rental Properties	10,000	Rental Fund Reserves	P
		554,500		

Board Policy Approval Process

The basic foundation to the following Board policy adoption process is that there are no revelations or last minute surprises to either the Board or the administration. Board members are to do their homework and provide input and concerns to the administration in advance of the Board meetings.

Step	Action To Be Taken	Board Action
Step 1	Michelle and Walt receive OSBA Policy revisions and Michelle provides hard copy of the revisions, with notes and options to Walt for his review.	No action is needed
Step 2	Walt reviews policies and makes hand written changes or deletion notations on the policy, which represent his recommendation regarding the each specific policy.	No action is needed.
Step 3	Walt provides his handwritten notated policies to Michelle to place on the upcoming Board meeting.	No action is needed
Step 4 Board Meeting One – First Reading	The OSBA Policies, with Walt’s handwritten recommended notation, are presented in the Board Packet under the Report Section of the Agenda.	Board members are to read the policies provided in the Board Packet and to come prepared to the meeting with a written list of policies that the Board member would want to discuss at the NEXT Board meeting. The list would be provided to Michelle. The policies <u>that are not of question</u> will be brought to the next Board for approval under the Consent Agenda.
Step 5 Board Meeting Two	Before the Board meeting, the written list of policies that a Board member wants to discuss will be provided to Walt by Michelle. If the Board member has not expressed concerns /suggested changes to Walt, Walt will contact the Board member to determine what are the concerns or suggested changes and be prepared to address the concerns at the next Board meeting.	No action is needed
Step 6 Board Meeting Two	Michelle organizes the policies into two agenda items . The policies that ARE NOT of question or concern shall be placed under the Consent Agenda as Second Reading and Approval. The policies that are of question or concern shall be placed under the Action/Discussion Agenda Items as Second Reading for Discussion/Approval .	Board approves the packet of policies either through the Consent and/or Action/Discussion Agenda (Please note that this action would take place at least 45 days after the District received the Policies. In many cases, depending upon timing, it may take up to 75 days to complete the process.)

Approved; November 24, 2014

Chart of Policy Revision Process

Step 1

District Receives Policy Update Packet from OSBA

Step 2

Administrative Assistant Prints Policies for Superintendent Review and Comments

Step 3

**Superintendent Reviews Updated Recommended Policy Changes
Superintendent provides to the Board at Board Meeting 1, in handwritten form, appropriate
comments and edits.**

Step 4 - Board Meeting 1

The Original Packet of Updated Policies, with the handwritten comments from the Superintendent, is placed on the Board Agenda (Board Meeting 1), under Reports and Information, and is considered as First Reading by the Board

Step 5 – Board Meeting 1

Before the Board meeting, if a Board member would like to discuss one or more of the policies provided, the Board member will request specific said policies be pulled for discussion at the next Board Meeting (Board Meeting 2) and placed under the Action Section of the Agenda	The policies presented to the Board, on which they have no concerns or questions, will be placed under the Consent Agenda (Second Reading and for Approval) at the next Board Meeting (Board Meeting 2) for action.
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Step 6 - Board Meeting 2

The policies requested by individual Board members to be discussed shall be place under the Action Section of the Board Agenda (Second Reading and Approval) Discussion will take place prior to a motion to approve said policies.	The policies presented to the Board, on which they have no concerns or questions, will be placed under the Consent Agenda (Second Reading and for Approval) for action.
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Lundy Elementary Heating Fuel Purchases

Lundy Elementary Square Footage: 38,062

MVA Charter West Wing Estimated Square Footage: 6,090 (16%)

Fiscal Year 2013-14					Fiscal Year 2014-15					Over/ (Under)
Delivered:	Gallons	Amount	Price/Gal	YTD Amt	Delivered:	Gallons	Amount	Price/Gal	YTD Amt	
9/25/2013	1,500	\$4,651.25	\$3.10083	\$4,651.25	9/24/2014	2,412	\$7,379.51	\$3.05950	\$7,379.51	\$2,728.26
11/26/2013	1,500	\$4,649.25	\$3.09950	\$9,300.50			\$0.00		\$7,379.51	
12/24/2013	2,200	\$7,041.83	\$3.20083	\$16,342.33			\$0.00		\$7,379.51	
1/22/2014	1,500	\$4,711.25	\$3.14083	\$21,053.58			\$0.00		\$7,379.51	
3/19/2014	1,500	\$4,711.25	\$3.14083	\$25,764.83			\$0.00		\$7,379.51	
Totals	8,200	\$25,764.83	\$3.14205		Totals	2,412	\$7,379.51	\$3.05950		

Lowell High School Heating Fuel Purchases

Lowell High School Square Footage: 27,966

Fiscal Year 2013-14					Fiscal Year 2014-15					Over/ (Under)
Delivered:	Gallons	Amount	Price/Gal	YTD Amt	Delivered:	Gallons	Amount	Price/Gal	YTD Amt	
9/25/2013	3,000	\$9,302.50	\$3.10083	\$9,302.50	9/24/2014	2,249	\$6,880.82	\$3.05950	\$6,880.82	-\$2,421.68
11/26/2013	2,000	\$6,199.00	\$3.09950	\$15,501.50			\$0.00		\$6,880.82	
12/24/2013	2,300	\$7,361.92	\$3.20083	\$22,863.41			\$0.00		\$6,880.82	
1/22/2014	3,000	\$9,422.50	\$3.14083	\$32,285.91			\$0.00		\$6,880.82	
3/19/2014	3,000	\$9,422.50	\$3.14083	\$41,708.41			\$0.00		\$6,880.82	
Totals	13,300	\$41,708.41	\$3.13597		Totals	2,249	\$6,880.82	\$3.05950		

Lundy Elementary Electricity Costs

Meter: 50288

Lundy Buildings excluding Cafeteria and Professional Development Center

Fiscal Year 2013-14				Fiscal Year 2014-15				Over/ (Under)
End date	Usage	Amount	YTD Amt	End date	Usage	Amount	YTD Amt	
8/14/2013	2,720	\$276.25	\$276.25	8/14/2014	5,000	\$483.99	\$483.99	\$207.74
9/12/2013	4,960	\$470.00	\$746.25	9/15/2014	6,080	\$579.05	\$1,063.04	\$316.79
10/14/2013	7,960	\$729.49	\$1,475.74	10/15/2014	7,720	\$723.42	\$1,786.46	\$310.72
11/13/2013	9,480	\$860.96	\$2,336.70	11/15/2014	10,080	\$931.16	\$2,717.62	\$380.92
12/12/2013	10,040	\$909.40	\$3,246.10				\$2,717.62	
1/15/2014	11,320	\$1,020.12	\$4,266.22				\$2,717.62	
2/12/2014	11,080	\$999.35	\$5,265.57				\$2,717.62	
3/13/2014	10,560	\$954.38	\$6,219.95				\$2,717.62	
4/14/2014	8,640	\$788.30	\$7,008.25				\$2,717.62	
5/14/2014	8,920	\$829.06	\$7,837.31				\$2,717.62	
6/16/2014	6,400	\$607.23	\$8,444.54				\$2,717.62	
7/14/2014	6,080	\$579.05	\$9,023.59				\$2,717.62	
Totals	98,160	\$9,023.59		Totals	28,880	\$2,717.62		

Lundy Elementary Electricity Costs

Meter: 71082

Lundy Cafeteria and Professional Development Center

Fiscal Year 2013-14				Fiscal Year 2014-15				Over/ (Under)
End date	Usage	Amount	YTD Amt	End date	Usage	Amount	YTD Amt	
8/14/2013	354	\$43.89	\$43.89	8/14/2014	1,341	\$133.07	\$133.07	\$89.18
9/12/2013	1,648	\$152.80	\$196.69	9/15/2014	2,156	\$209.53	\$342.60	\$145.91
10/14/2013	2,158	\$197.80	\$394.49	10/15/2014	2,361	\$229.06	\$571.66	\$177.17
11/13/2013	2,160	\$193.57	\$588.06	11/15/2014	2,102	\$199.88	\$771.54	\$183.48
12/12/2013	1,925	\$173.31	\$761.37				\$771.54	
1/15/2014	1,837	\$175.21	\$936.58				\$771.54	
2/12/2014	1,999	\$190.29	\$1,126.87				\$771.54	
3/13/2014	2,238	\$212.55	\$1,339.42				\$771.54	
4/14/2014	2,453	\$232.57	\$1,571.99				\$771.54	
5/14/2014	2,360	\$228.96	\$1,800.95				\$771.54	
6/16/2014	2,379	\$230.78	\$2,031.73				\$771.54	
7/14/2014	1,430	\$140.88	\$2,172.61				\$771.54	
Totals	22,941	\$2,172.61		Totals	7,960	\$771.54		

Lowell High School Electricity Costs

Meters: 61924, 70132, 61910, 50287

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

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

Fiscal Year 2013-14				Fiscal Year 2014-15				Over/ (Under)
End date	Usage	Amount	YTD	End date	Usage	Amount	YTD	
8/14/2013	4,310	\$419.91	\$419.91	8/14/2014	6,368	\$629.62	\$629.62	\$209.71
9/12/2013	7,319	\$677.65	\$1,097.56	9/15/2014	8,318	\$809.66	\$1,439.28	\$341.72
10/14/2013	11,688	\$1,041.62	\$2,139.18	10/15/2014	9,839	\$950.69	\$2,389.97	\$250.79
11/13/2013	13,879	\$1,202.40	\$3,341.58	11/15/2014	11,715	\$1,092.63	\$3,482.60	\$141.02
12/12/2013	25,651	\$2,218.25	\$5,559.83				\$3,482.60	
1/15/2014	26,127	\$2,230.29	\$7,790.12				\$3,482.60	
2/12/2014	25,481	\$2,196.18	\$9,986.30				\$3,482.60	
3/13/2014	15,010	\$1,346.80	\$11,333.10				\$3,482.60	
4/14/2014	12,092	\$1,106.98	\$12,440.08				\$3,482.60	
5/14/2014	9,788	\$932.80	\$13,372.88				\$3,482.60	
6/16/2014	6,927	\$691.18	\$14,064.06				\$3,482.60	
7/14/2014	5,288	\$531.29	\$14,595.35				\$3,482.60	
Totals	163,560	\$14,595.35		Totals	36,240	\$3,482.60		

Mountain View Academy
Financial Statement Review
November 1-30, 2014

General Fund Revenue Highlights:

- No extraordinary items to report.

General Fund Expenditure Highlights:

- PERS was budgeted at 20.29% for all ten employees but is currently being paid at 26.29% (20.29% + 6% pickup) for the four eligible employees. The other six employees will become PERS eligible with the March payroll.
- State unemployment insurance (3.1% on all salaries) was not included in the budget. The rate will be lowered to 2.9% in 2015.
- Workers' compensation expense is over budget because the actual includes the daily Workers' Benefit Fund assessment of \$.0165 per hour but not the Workers' Compensation premium amount (\$.47 per \$100 of payroll).
- Curriculum/textbooks and supplies are distributed 90% to elementary and 10% to middle/junior high grades. The State requires us to split elementary grade expenses from the middle school/junior high grade expenses. The 90/10 split is roughly the percentage of students in grades K-6 / grade 7.

General comments:

- Five of the twelve months, or 42% of the year has passed. Expenditures are 29.7% of the budget to date.
- State School Revenue Funding is only 34% of budget because the State pays 25% of the budget in May.

Special Revenue Fund Highlights:

- 93% of the Activity Fees have been spent totaling \$6,632 with just \$8,905 collected to date.

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Accrual Basis

Mt. View Academy
Balance Sheet
As of November 30, 2014

	<u>Nov 30, 14</u>
ASSETS	
Current Assets	
Checking/Savings	
100-101 - Siuslaw Checking	58,813.02
100-102 - Selco Checking	300.05
Total Checking/Savings	<u>59,113.07</u>
Total Current Assets	<u>59,113.07</u>
TOTAL ASSETS	<u>59,113.07</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
100-471.001 Federal Withhold	1,332.00
100-471.004 Soc Sec Emp	2,060.38
100-471.005 WBF Assess Emp	41.77
100-473.004 Workers' Comp	-384.34
24000 - Payroll Liabilities	7,087.16
Total Other Current Liabilities	<u>10,136.97</u>
Total Current Liabilities	<u>10,136.97</u>
Total Liabilities	10,136.97
Equity	
32000 - Unrestricted Net Assets	12,785.17
Net Income	36,190.93
Total Equity	<u>48,976.10</u>
TOTAL LIABILITIES & EQUITY	<u>59,113.07</u>

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Accrual Basis

Mt. View Academy
Profit & Loss
 July through November 2014

	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	TOTAL
Income						
100 - Revenues						
1510 - Interest Income	1.19	2.37	5.07	4.80	4.51	17.94
1920 - Donations	13,000.00	0.00	0.00	0.00	0.00	13,000.00
3101 - State School Fund Grant	0.00	0.00	79,972.16	42,763.00	41,871.00	164,606.16
Total 100 - Revenues	13,001.19	2.37	79,977.23	42,767.80	41,875.51	177,624.10
200 - Special Revenues						
1740 - Fees	2,150.00	1,875.00	2,815.00	1,630.00	435.00	8,905.00
Total 200 - Special Revenues	2,150.00	1,875.00	2,815.00	1,630.00	435.00	8,905.00
Total Income	15,151.19	1,877.37	82,792.23	44,397.80	42,310.51	186,529.10
Expense						
100 - Expenditures						
1111 - Elementary						
111 - Licensed Salaries	0.00	0.00	17,566.65	17,566.65	17,566.65	52,699.95
112 - Classified Salaries	0.00	0.00	505.00	935.00	1,190.00	2,630.00
121 - Substitute - Licensed	0.00	0.00	0.00	0.00	514.50	514.50
211 - PERS	0.00	0.00	2,234.64	2,234.64	2,234.64	6,703.92
220 - FICA	0.00	0.00	1,382.48	1,415.38	1,474.26	4,272.12
231 - Workers' Compensation	0.00	0.00	84.25	100.68	105.82	290.75
232 - Unemployment Insurance	0.00	0.00	560.21	573.58	597.40	1,731.19
410 - Supplies	0.00	3,705.52	1,271.45	28.96	127.65	5,133.58
420 - Textbooks	0.00	1,722.29	6,442.82	2,644.89	2,626.46	13,436.46
Total 1111 - Elementary	0.00	5,427.81	30,047.50	25,499.78	26,437.38	87,412.47
1121 - Middle/Junior High						
111 - Licensed Salaries	0.00	0.00	2,833.33	2,833.33	2,833.33	8,499.99
220 - FICA	0.00	0.00	216.75	216.75	216.75	650.25
231 - Workers' Compensation	0.00	0.00	0.00	15.34	13.32	28.66
232 - Unemployment Insurance	0.00	0.00	87.83	87.84	89.97	265.64
410 - Supplies	0.00	411.72	117.98	0.00	14.18	543.88
420 - Textbooks	0.00	191.37	505.04	286.21	291.83	1,274.45
Total 1121 - Middle/Junior High	0.00	603.09	3,760.93	3,439.47	3,459.38	11,262.87
2240 - Professional Development						
312 - Instructional Prog. Impr.	0.00	107.55	0.00	360.00	0.00	467.55
318 - Non-instructional Prg Imp	0.00	0.00	0.00	0.00	75.00	75.00
Total 2240 - Professional Development	0.00	107.55	0.00	360.00	75.00	542.55
2310 - Board of Education						
651 - Liability Insurance	0.00	0.00	3,044.67	153.67	153.67	3,352.01
Total 2310 - Board of Education	0.00	0.00	3,044.67	153.67	153.67	3,352.01

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Accrual Basis

Mt. View Academy
Profit & Loss
 July through November 2014

	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	TOTAL
2321 - Executive Administration						
113 - Administrative Salaries	0.00	0.00	2,833.33	2,833.33	2,833.33	8,499.99
114 - Managerial-Confidential	0.00	0.00	1,600.50	1,995.00	1,995.00	5,590.50
211 - PERS	0.00	0.00	744.88	744.88	744.88	2,234.64
220 - FICA	0.00	0.00	339.19	369.36	369.37	1,077.92
231 - Workers' Compensation	0.00	0.00	21.80	26.98	27.10	75.88
232 - Unemployment Insurance	0.00	0.00	137.45	149.68	149.68	436.81
353 - Postage	0.00	9.80	0.00	52.04	61.65	123.49
354 - Advertising	0.00	0.00	463.66	0.00	0.00	463.66
410 - Supplies	15.00	534.80	765.61	234.58	186.72	1,736.71
640 - Dues and Fees	0.00	0.00	327.84	178.04	59.00	564.88
Total 2321 - Executive Administration	15.00	544.60	7,234.26	6,583.89	6,426.73	20,804.48
2520 - Fiscal Services						
389 - Other Professional Svcs	0.00	0.00	4,000.00	2,000.00	2,000.00	8,000.00
410 - Supplies	0.00	0.00	198.43	0.00	0.00	198.43
Total 2520 - Fiscal Services	0.00	0.00	4,198.43	2,000.00	2,000.00	8,198.43
2542 - Building Maintenance						
321 - Cleaning Services	0.00	0.00	240.00	300.00	240.00	780.00
324 - Rentals	0.00	0.00	3,450.00	2,300.00	2,300.00	8,050.00
325 - Electricity	0.00	0.00	0.00	500.00	250.00	750.00
351 - Telephone	0.00	0.00	0.00	286.86	93.22	380.08
410 - Supplies	0.00	333.11	381.83	260.44	192.49	1,167.87
Total 2542 - Building Maintenance	0.00	333.11	4,071.83	3,647.30	3,075.71	11,127.95
2574 - Printing Services						
324 - Copier Rental	0.00	0.00	0.00	401.33	178.00	579.33
355 - Printing	0.00	0.00	0.00	0.00	426.19	426.19
Total 2574 - Printing Services	0.00	0.00	0.00	401.33	604.19	1,005.52
Total 100 - Expenditures	15.00	7,016.16	52,357.62	42,085.44	42,232.06	143,706.28
200 - Activity Expenditures						
1111 - Elementary						
410 - Supplies	0.00	504.13	2,312.73	1,157.52	2,657.51	6,631.89
Total 1111 - Elementary	0.00	504.13	2,312.73	1,157.52	2,657.51	6,631.89
Total 200 - Activity Expenditures	0.00	504.13	2,312.73	1,157.52	2,657.51	6,631.89
66000 - Payroll Expenses	0.00	0.00	0.00	0.00	0.00	0.00
Total Expense	15.00	7,520.29	54,670.35	43,242.96	44,889.57	150,338.17
Net Income	15,136.19	-5,642.92	28,121.88	1,154.84	-2,579.06	36,190.93

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Accrual Basis

Mt. View Academy

Transaction Detail by Account

November 2014

Type	Date	Num	Name	Memo	Amount
100 - Revenues					
1510 - Interest Income					
Deposit	11/28/2014			November interest	4.47
Deposit	11/30/2014			November interest	0.04
Total 1510 - Interest Income					4.51
3101 - State School Fund Grant					
Deposit	11/26/2014			November SSF payment	41,871.00
Total 3101 - State School Fund Grant					41,871.00
Total 100 - Revenues					41,875.51
200 - Special Revenues					
1740 - Fees					
Deposit	11/05/2014			Activity fees	285.00
Check	11/12/2014	1064	Cory Graham	Refund Activity Fee - Graham	-200.00
Deposit	11/13/2014			Activity fee	300.00
Deposit	11/26/2014			Activity fee	50.00
Total 1740 - Fees					435.00
Total 200 - Special Revenues					435.00
100 - Expenditures					
1111 - Elementary					
111 - Licensed Salaries					
Paycheck	11/25/2014	DD1001	Barreau, Amy E.	Direct Deposit	-2,833.33
Paycheck	11/25/2014	DD1002	Cardwell, Jessica K.	Direct Deposit	-2,833.33
Paycheck	11/25/2014	DD1003	Cardwell, Kirsten C.	Direct Deposit	-2,833.33
Paycheck	11/25/2014	DD1005	Chapman, Jill R.	Direct Deposit	-2,833.33
Paycheck	11/25/2014	DD1010	Trimble, Carmen A.	Direct Deposit	-2,833.33
Paycheck	11/25/2014	DD1011	Mikulich, Erin D.	Direct Deposit	-3,400.00
Total 111 - Licensed Salaries					-17,566.65
112 - Classified Salaries					
Paycheck	11/25/2014	DD1006	Corwin, Amanda	Direct Deposit	-242.50
Paycheck	11/25/2014	DD1009	Smith, Dana R.	Direct Deposit	-947.50
Total 112 - Classified Salaries					-1,190.00
121 - Substitute - Licensed					
Paycheck	11/25/2014	1074	Carter, Lucinda S		-171.50
Paycheck	11/25/2014	1075	Holmes, Terry L		-171.50
Paycheck	11/25/2014	1080	Comstock, Diane J	Direct Deposit	-171.50
Total 121 - Substitute - Licensed					-514.50
211 - PERS					
General Jou...	11/25/2014	2015-6		Nov PERS	-2,234.64
Total 211 - PERS					-2,234.64
220 - FICA					
General Jou...	11/25/2014	2015-6		Nov FICA	-1,474.26
Total 220 - FICA					-1,474.26
231 - Workers' Compensation					
General Jou...	11/25/2014	2015-6		Nov WBF	-15.22
General Jou...	11/25/2014	2015-6		Nov WC	-90.60
Total 231 - Workers' Compensation					-105.82
232 - Unemployment Insurance					
General Jou...	11/25/2014	2015-6		Nov UI	-597.40
Total 232 - Unemployment Insurance					-597.40
410 - Supplies					
General Jou...	11/28/2014	2015-7		Accrue Nov AMEX	-127.65
Total 410 - Supplies					-127.65

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Accrual Basis

Mt. View Academy

Transaction Detail by Account

November 2014

Type	Date	Num	Name	Memo	Amount
420 - Textbooks					
General Jou...	11/01/2014	2015-5R		Accrue Oct Amex payment	2,575.89
Check	11/04/2014		American Express	October AMEX charges	-2,575.89
Check	11/18/2014	1071	McGraw Hill Education	Curriculum	-384.12
General Jou...	11/28/2014	2015-7		Accrue Nov AMEX	-2,242.34
Total 420 - Textbooks					-2,626.46
Total 1111 - Elementary					-26,437.38
1121 - Middle/Junior High					
111 - Licensed Salaries					
Paycheck	11/25/2014	DD1008	Miles, Robert H.	Direct Deposit	-2,833.33
Total 111 - Licensed Salaries					-2,833.33
220 - FICA					
General Jou...	11/25/2014	2015-6		Nov FICA	-216.75
Total 220 - FICA					-216.75
231 - Workers' Compensation					
General Jou...	11/25/2014	2015-6		Nov WC	-13.32
Total 231 - Workers' Compensation					-13.32
232 - Unemployment Insurance					
General Jou...	11/25/2014	2015-6		Nov UI	-87.83
General Jou...	11/25/2014	2015-6		Nov WBF	-2.14
Total 232 - Unemployment Insurance					-89.97
410 - Supplies					
General Jou...	11/28/2014	2015-7		Accrue Nov AMEX	-14.18
Total 410 - Supplies					-14.18
420 - Textbooks					
General Jou...	11/01/2014	2015-5R		Accrue Oct Amex payment	286.21
Check	11/04/2014		American Express	October AMEX charges	-286.21
Check	11/18/2014	1071	McGraw Hill Education	Curriculum	-42.68
General Jou...	11/28/2014	2015-7		Accrue Nov AMEX	-249.15
Total 420 - Textbooks					-291.83
Total 1121 - Middle/Junior High					-3,459.38
2240 - Professional Development					
318 - Non-instructional Prg Imp					
Check	11/12/2014	1061	Willamette ESD	SOUP Conference - Harris	-75.00
Total 318 - Non-instructional Prg Imp					-75.00
Total 2240 - Professional Development					-75.00
2310 - Board of Education					
651 - Liability Insurance					
Check	11/18/2014	1066	Great American Insuran...	Liability insurance	-153.67
Total 651 - Liability Insurance					-153.67
Total 2310 - Board of Education					-153.67
2321 - Executive Administration					
113 - Administrative Salaries					
Paycheck	11/25/2014	DD1004	Cardwell, Laurie K.	Direct Deposit	-2,833.33
Total 113 - Administrative Salaries					-2,833.33
114 - Managerial-Confidential					
Paycheck	11/25/2014	DD1007	Harris, Kelly L.	Direct Deposit	-1,995.00
Total 114 - Managerial-Confidential					-1,995.00
211 - PERS					
General Jou...	11/25/2014	2015-6		Nov PERS	-744.88
Total 211 - PERS					-744.88

Mt. View Academy

Transaction Detail by Account

November 2014

Type	Date	Num	Name	Memo	Amount
220 - FICA					
General Jou...	11/25/2014	2015-6		Nov FICA	-369.37
Total 220 - FICA					-369.37
231 - Workers' Compensation					
General Jou...	11/25/2014	2015-6		Nov WBF	-4.40
General Jou...	11/25/2014	2015-6		Nov WC	-22.70
Total 231 - Workers' Compensation					-27.10
232 - Unemployment Insurance					
General Jou...	11/25/2014	2015-6		Nov UI	-149.68
Total 232 - Unemployment Insurance					-149.68
353 - Postage					
Check	11/12/2014	1056	Harris, Kelly L.	Box Tops postage	-12.65
Check	11/18/2014	1068	Harris, Kelly L.	Stamps	-49.00
Total 353 - Postage					-61.65
410 - Supplies					
General Jou...	11/28/2014	2015-7		Accrue Nov AMEX	-186.72
Total 410 - Supplies					-186.72
640 - Dues and Fees					
General Jou...	11/01/2014	2015-5R		Accrue Oct Amex payment	23.04
Check	11/04/2014		American Express	October AMEX charges	-23.04
Check	11/12/2014	1058	Oregon Dept. of Educat...	Fingerprinting	-59.00
Total 640 - Dues and Fees					-59.00
Total 2321 - Executive Administration					-6,426.73
2520 - Fiscal Services					
389 - Other Professional Svcs					
Check	11/21/2014	1078	Lowell School District	Nov. business services	-2,000.00
Total 389 - Other Professional Svcs					-2,000.00
Total 2520 - Fiscal Services					-2,000.00
2542 - Building Maintenance					
321 - Cleaning Services					
Check	11/21/2014	1077	Christina Poggemeyer	Nov. janitorial services	-240.00
Total 321 - Cleaning Services					-240.00
324 - Rentals					
Check	11/21/2014	1078	Lowell School District	Nov. rent	-2,300.00
Total 324 - Rentals					-2,300.00
325 - Electricity					
Check	11/21/2014	1078	Lowell School District	Nov. utilities	-250.00
Total 325 - Electricity					-250.00
351 - Telephone					
General Jou...	11/01/2014	2015-5R		Accrue Oct Amex payment	286.86
Check	11/04/2014		American Express	October AMEX charges	-286.86
Check	11/18/2014	1073	Verizon Wireless	Oct. phone charges	-93.22
Total 351 - Telephone					-93.22
410 - Supplies					
General Jou...	11/01/2014	2015-5R		Accrue Oct Amex payment	10.44
Check	11/04/2014		American Express	October AMEX charges	-10.44
Check	11/12/2014	1059	Coastwide Laboratories	Inv. 2715162 - Custodial supplies	-78.68
General Jou...	11/28/2014	2015-7		Accrue Nov AMEX	-113.81
Total 410 - Supplies					-192.49
Total 2542 - Building Maintenance					-3,075.71

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Accrual Basis

Mt. View Academy

Transaction Detail by Account

November 2014

Type	Date	Num	Name	Memo	Amount
2574 - Printing Services					
324 - Copier Rental					
Check	11/12/2014	1060	GE Capital	Inv. 61613567 - Copier rental	-178.00
Total 324 - Copier Rental					-178.00
355 - Printing					
Check	11/12/2014	1063	National Photocopy	Inv. IN2020 - Copies	-277.35
Check	11/21/2014	1079	National Photocopy	Inv. IN2817 - Copies	-148.84
Total 355 - Printing					-426.19
Total 2574 - Printing Services					-604.19
Total 100 - Expenditures					-42,232.06
200 - Activity Expenditures					
1111 - Elementary					
410 - Supplies					
General Jou...	11/01/2014	2015-5R		Reverse of GJE 2015-5 -- Accrue Am...	212.62
Check	11/04/2014		American Express	October AMEX charges	-212.62
Check	11/12/2014	1054	Salem First Baptist Chu...	SeaKrest Lodge deposit	-200.00
Check	11/12/2014	1055	Barreau, Amy E.	K/1 Snacks & Harvest Party	-97.77
Check	11/12/2014	1057	Cardwell, Laurie K.	Aquarium Lab Fee	-135.00
Check	11/12/2014	1062	Ultimate Team Spirit	Inv. 135 - Student Logo Shirts	-1,022.48
Check	11/18/2014	1065	Mikulich, Erin D.	Craft class supplies	-37.80
Check	11/18/2014	1067	Chapman, Jill R.	PJ day/Box top reward	-15.99
Check	11/18/2014	1069	Cardwell, Laurie K.	Skate World fee	-209.00
Check	11/18/2014	1070	Lowell School District	Skate World trip	-64.08
Check	11/18/2014	1070	Lowell School District	Northern Lights trip	-54.72
General Jou...	11/28/2014	2015-7		Accrue Nov AMEX	-820.67
Total 410 - Supplies					-2,657.51
Total 1111 - Elementary					-2,657.51
Total 200 - Activity Expenditures					-2,657.51
66000 - Payroll Expenses					
Paycheck	11/25/2014	1074	Carter, Lucinda S		-0.12
Paycheck	11/25/2014	1074	Carter, Lucinda S		-10.63
Paycheck	11/25/2014	1074	Carter, Lucinda S		-2.49
Paycheck	11/25/2014	1074	Carter, Lucinda S		-5.32
Paycheck	11/25/2014	1074	Carter, Lucinda S		-0.81
Paycheck	11/25/2014	1075	Holmes, Terry L		-0.12
Paycheck	11/25/2014	1075	Holmes, Terry L		-10.63
Paycheck	11/25/2014	1075	Holmes, Terry L		-2.49
Paycheck	11/25/2014	1075	Holmes, Terry L		-5.32
Paycheck	11/25/2014	1075	Holmes, Terry L		-0.81
Paycheck	11/25/2014	DD1001	Barreau, Amy E.	Direct Deposit	-744.88
Paycheck	11/25/2014	DD1001	Barreau, Amy E.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1001	Barreau, Amy E.	Direct Deposit	-175.67
Paycheck	11/25/2014	DD1001	Barreau, Amy E.	Direct Deposit	-41.08
Paycheck	11/25/2014	DD1001	Barreau, Amy E.	Direct Deposit	-87.83
Paycheck	11/25/2014	DD1001	Barreau, Amy E.	Direct Deposit	-13.32
Paycheck	11/25/2014	DD1002	Cardwell, Jessica K.	Direct Deposit	-744.88
Paycheck	11/25/2014	DD1002	Cardwell, Jessica K.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1002	Cardwell, Jessica K.	Direct Deposit	-175.67
Paycheck	11/25/2014	DD1002	Cardwell, Jessica K.	Direct Deposit	-41.08
Paycheck	11/25/2014	DD1002	Cardwell, Jessica K.	Direct Deposit	-87.83
Paycheck	11/25/2014	DD1002	Cardwell, Jessica K.	Direct Deposit	-13.32
Paycheck	11/25/2014	DD1003	Cardwell, Kirsten C.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1003	Cardwell, Kirsten C.	Direct Deposit	-175.67
Paycheck	11/25/2014	DD1003	Cardwell, Kirsten C.	Direct Deposit	-41.08
Paycheck	11/25/2014	DD1003	Cardwell, Kirsten C.	Direct Deposit	-87.83
Paycheck	11/25/2014	DD1003	Cardwell, Kirsten C.	Direct Deposit	-13.32
Paycheck	11/25/2014	DD1004	Cardwell, Laurie K.	Direct Deposit	-744.88
Paycheck	11/25/2014	DD1004	Cardwell, Laurie K.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1004	Cardwell, Laurie K.	Direct Deposit	-175.67
Paycheck	11/25/2014	DD1004	Cardwell, Laurie K.	Direct Deposit	-41.08
Paycheck	11/25/2014	DD1004	Cardwell, Laurie K.	Direct Deposit	-87.83

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Accrual Basis

Mt. View Academy

Transaction Detail by Account

November 2014

Type	Date	Num	Name	Memo	Amount
Paycheck	11/25/2014	DD1004	Cardwell, Laurie K.	Direct Deposit	-13.32
Paycheck	11/25/2014	DD1005	Chapman, Jill R.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1005	Chapman, Jill R.	Direct Deposit	-175.67
Paycheck	11/25/2014	DD1005	Chapman, Jill R.	Direct Deposit	-41.08
Paycheck	11/25/2014	DD1005	Chapman, Jill R.	Direct Deposit	-87.83
Paycheck	11/25/2014	DD1005	Chapman, Jill R.	Direct Deposit	-13.32
Paycheck	11/25/2014	DD1006	Corwin, Amanda	Direct Deposit	-0.41
Paycheck	11/25/2014	DD1006	Corwin, Amanda	Direct Deposit	-15.04
Paycheck	11/25/2014	DD1006	Corwin, Amanda	Direct Deposit	-3.52
Paycheck	11/25/2014	DD1006	Corwin, Amanda	Direct Deposit	-7.52
Paycheck	11/25/2014	DD1006	Corwin, Amanda	Direct Deposit	-1.14
Paycheck	11/25/2014	DD1007	Harris, Kelly L.	Direct Deposit	-2.26
Paycheck	11/25/2014	DD1007	Harris, Kelly L.	Direct Deposit	-123.69
Paycheck	11/25/2014	DD1007	Harris, Kelly L.	Direct Deposit	-28.93
Paycheck	11/25/2014	DD1007	Harris, Kelly L.	Direct Deposit	-61.85
Paycheck	11/25/2014	DD1007	Harris, Kelly L.	Direct Deposit	-9.38
Paycheck	11/25/2014	DD1008	Miles, Robert H.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1008	Miles, Robert H.	Direct Deposit	-175.67
Paycheck	11/25/2014	DD1008	Miles, Robert H.	Direct Deposit	-41.08
Paycheck	11/25/2014	DD1008	Miles, Robert H.	Direct Deposit	-87.83
Paycheck	11/25/2014	DD1008	Miles, Robert H.	Direct Deposit	-13.32
Paycheck	11/25/2014	DD1009	Smith, Dana R.	Direct Deposit	-1.61
Paycheck	11/25/2014	DD1009	Smith, Dana R.	Direct Deposit	-58.75
Paycheck	11/25/2014	DD1009	Smith, Dana R.	Direct Deposit	-13.74
Paycheck	11/25/2014	DD1009	Smith, Dana R.	Direct Deposit	-29.37
Paycheck	11/25/2014	DD1009	Smith, Dana R.	Direct Deposit	-4.45
Paycheck	11/25/2014	DD1010	Trimble, Carmen A.	Direct Deposit	-744.88
Paycheck	11/25/2014	DD1010	Trimble, Carmen A.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1010	Trimble, Carmen A.	Direct Deposit	-175.67
Paycheck	11/25/2014	DD1010	Trimble, Carmen A.	Direct Deposit	-41.08
Paycheck	11/25/2014	DD1010	Trimble, Carmen A.	Direct Deposit	-87.83
Paycheck	11/25/2014	DD1010	Trimble, Carmen A.	Direct Deposit	-13.32
Paycheck	11/25/2014	DD1011	Mikulich, Erin D.	Direct Deposit	-2.14
Paycheck	11/25/2014	DD1011	Mikulich, Erin D.	Direct Deposit	-210.80
Paycheck	11/25/2014	DD1011	Mikulich, Erin D.	Direct Deposit	-49.30
Paycheck	11/25/2014	DD1011	Mikulich, Erin D.	Direct Deposit	-105.40
Paycheck	11/25/2014	DD1011	Mikulich, Erin D.	Direct Deposit	-15.98
Paycheck	11/25/2014	1080	Comstock, Diane J	Direct Deposit	-0.12
Paycheck	11/25/2014	1080	Comstock, Diane J	Direct Deposit	-10.63
Paycheck	11/25/2014	1080	Comstock, Diane J	Direct Deposit	-2.49
Paycheck	11/25/2014	1080	Comstock, Diane J	Direct Deposit	-5.32
Paycheck	11/25/2014	1080	Comstock, Diane J	Direct Deposit	-0.81
General Jou...	11/25/2014	2015-6		Allocate payroll liabilities	6,023.19
Total 66000 · Payroll Expenses					0.00
TOTAL					-2,579.06

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Accrual Basis

Mt. View Academy
Profit & Loss Budget vs. Actual
July through November 2014

	Jul - Nov 14	Budget	\$ Over Budget	% of Budget
Income				
100 - Revenues				
1510 - Interest Income	17.94			
1760 - Fundraising	0.00	5,000.00	-5,000.00	0.0%
1920 - Donations	13,000.00	15,000.00	-2,000.00	86.7%
3101 - State School Fund Grant	164,606.16	484,555.20	-319,949.04	34.0%
Total 100 - Revenues	177,624.10	504,555.20	-326,931.10	35.2%
200 - Special Revenues				
1740 - Fees	8,905.00	23,750.00	-14,845.00	37.5%
Total 200 - Special Revenues	8,905.00	23,750.00	-14,845.00	37.5%
Total Income	186,529.10	528,305.20	-341,776.10	35.3%
Expense				
100 - Expenditures				
1111 - Elementary				
111 - Licensed Salaries	52,699.95	204,000.00	-151,300.05	25.8%
112 - Classified Salaries	2,630.00	8,280.00	-5,650.00	31.8%
121 - Substitute - Licensed	514.50	5,985.00	-5,470.50	8.6%
211 - PERS	6,703.92	41,391.60	-34,687.68	16.2%
220 - FICA	4,272.12	16,697.27	-12,425.15	25.6%
231 - Workers' Compensation	290.75	125.61	165.14	231.5%
232 - Unemployment Insurance	1,731.19			
410 - Supplies	5,133.58	10,341.25	-5,207.67	49.6%
420 - Textbooks	13,436.46	12,682.50	753.96	105.9%
Total 1111 - Elementary	87,412.47	299,503.23	-212,090.76	29.2%
1121 - Middle/Junior High				
111 - Licensed Salaries	8,499.99	34,000.00	-25,500.01	25.0%
121 - Substitute - Licensed	0.00	855.00	-855.00	0.0%
211 - PERS	0.00	6,898.60	-6,898.60	0.0%
220 - FICA	650.25	2,666.41	-2,016.16	24.4%
231 - Workers' Compensation	28.66	20.45	8.21	140.1%
232 - Unemployment Insurance	265.64			
410 - Supplies	543.88	1,283.75	-739.87	42.4%
420 - Textbooks	1,274.45	1,567.50	-293.05	81.3%
Total 1121 - Middle/Junior High	11,262.87	47,291.71	-36,028.84	23.8%
2240 - Professional Development				
312 - Instructional Prog. Impr.	467.55	9,400.00	-8,932.45	5.0%
318 - Non-instructional Prg Imp	75.00			
Total 2240 - Professional Development	542.55	9,400.00	-8,857.45	5.8%
2310 - Board of Education				
651 - Liability Insurance	3,352.01	2,000.00	1,352.01	167.6%
Total 2310 - Board of Education	3,352.01	2,000.00	1,352.01	167.6%
2321 - Executive Administration				
113 - Administrative Salaries	8,499.99	34,000.00	-25,500.01	25.0%
114 - Managerial-Confidential	5,590.50	15,960.00	-10,369.50	35.0%
211 - PERS	2,234.64	10,136.88	-7,902.24	22.0%
220 - FICA	1,077.92	3,821.94	-2,744.02	28.2%
231 - Workers' Compensation	75.88	39.93	35.95	190.0%
232 - Unemployment Insurance	436.81			
353 - Postage	123.49			
354 - Advertising	463.66			
410 - Supplies	1,736.71	2,000.00	-263.29	86.8%
640 - Dues and Fees	564.88			
Total 2321 - Executive Administration	20,804.48	65,958.75	-45,154.27	31.5%
2520 - Fiscal Services				
389 - Other Professional Svcs	8,000.00	20,000.00	-12,000.00	40.0%
410 - Supplies	198.43			
Total 2520 - Fiscal Services	8,198.43	20,000.00	-11,801.57	41.0%

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Accrual Basis

Mt. View Academy
Profit & Loss Budget vs. Actual
 July through November 2014

	Jul - Nov 14	Budget	\$ Over Budget	% of Budget
2542 - Building Maintenance				
321 - Cleaning Services	780.00	3,200.00	-2,420.00	24.4%
324 - Rentals	8,050.00	27,600.00	-19,550.00	29.2%
325 - Electricity	750.00	2,500.00	-1,750.00	30.0%
328 - Garbage	0.00	500.00	-500.00	0.0%
351 - Telephone	380.08	859.00	-478.92	44.2%
410 - Supplies	1,167.87	1,800.00	-632.13	64.9%
Total 2542 - Building Maintenance	11,127.95	36,459.00	-25,331.05	30.5%
2574 - Printing Services				
324 - Copier Rental	579.33			
355 - Printing	426.19	3,000.00	-2,573.81	14.2%
Total 2574 - Printing Services	1,005.52	3,000.00	-1,994.48	33.5%
2661 - Technology Services				
310 - Instr, Prof & Tech Svcs	0.00	400.00	-400.00	0.0%
Total 2661 - Technology Services	0.00	400.00	-400.00	0.0%
Total 100 - Expenditures	143,706.28	484,012.69	-340,306.41	29.7%
200 - Activity Expenditures				
1111 - Elementary				
410 - Supplies	6,631.89	7,125.00	-493.11	93.1%
Total 1111 - Elementary	6,631.89	7,125.00	-493.11	93.1%
Total 200 - Activity Expenditures	6,631.89	7,125.00	-493.11	93.1%
66000 - Payroll Expenses	0.00			
Total Expense	150,338.17	491,137.69	-340,799.52	30.6%
Net Income	36,190.93	37,167.51	-976.58	97.4%

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

	Budget	Actual: Jul-Nov		Projected: Dec-Jun		Projected for Year	Over/(Under) Budget		
Resources									
State School Fund	2,855,000	1,296,925	46.2%	1,511,953	53.8%	2,808,878	(46,122)	-1.6%	(1)
Property Tax	871,400	551,469	60.8%	355,024	39.2%	906,493	35,093	4.0%	(1)
Miscellaneous/Local Revenues	40,000	23,036	57.5%	17,000	42.5%	40,036	36	0.1%	
Common School Funds	28,000	-	0.0%	29,786	100.0%	29,786	1,786	6.4%	
Rent	27,000	8,800	33.0%	17,850	67.0%	26,650	(350)	-1.3%	
Small High School Grant	14,000	-	0.0%	14,000	100.0%	14,000	-	0.0%	
Indirect Fees on Grants	5,000	811	16.2%	4,189	83.8%	5,000	-	0.0%	
County School Funds	4,000	-	0.0%	4,000	100.0%	4,000	-	0.0%	
Business Services to Charter	-	8,000	40.0%	12,000	60.0%	20,000	20,000	-	
Interest	3,400	1,483	37.7%	2,450	62.3%	3,933	533	15.7%	
Total Revenues	3,847,800	1,890,524	49.0%	1,968,251	51.0%	3,858,775	10,975	0.3%	
Beginning Fund Balance	245,000	385,000	100.0%	-	0.0%	385,000	140,000	57.1%	(2)
Total Resources	4,092,800	2,275,524	53.6%	1,968,251	46.4%	4,243,775	150,975	3.7%	
Requirements									
Salaries	1,407,399	449,355	31.9%	959,898	68.1%	1,409,253	1,854	0.1%	
Benefits	980,030	277,985	31.1%	614,545	68.9%	892,530	(87,500)	-8.9%	(3)
Purchased Services	417,010	92,087	22.3%	320,925	77.7%	413,012	(3,998)	-1.0%	
Supplies and Materials	275,325	148,567	53.3%	130,031	46.7%	278,598	3,273	1.2%	
Capital Outlay	10,000	-	-	10,000	100.0%	10,000	-	-	
Other	70,560	76,245	95.6%	3,500	4.4%	79,745	9,185	13.0%	
Charter School Payments	538,000	164,606	32.1%	347,989	67.9%	512,595	(25,405)	-4.7%	(4)
Transfers	228,539	-	0.0%	228,539	100.0%	228,539	-	0.0%	
Total Expenditures	3,926,863	1,208,845	31.6%	2,615,426	68.4%	3,824,271	(102,592)	-2.6%	
Contingency/Carryover	165,937	-	0.0%	-	0.0%	419,504	253,567	152.8%	
Total Requirements	4,092,800	1,208,845	28.5%	2,615,426	61.6%	4,243,775	150,975	3.7%	

(1) Assessed valuation increased 5.4% over the prior year. The additional local revenue reduces the amount from the state school fund.

(2) 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.

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

(4) Based on current averagee ADMr figure of 85 and 19 students from other districts without open enrollment agreements.