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**DISTRICT GOALS: Improve Student Achievement, K-3 Literacy, On-Time Graduation**

**MEETING AGENDA**

**1. WELCOME**

- A. Call to Order
- B. Flag Salute

**2. AUDIENCE COMMENTS**

This is a time for citizens to address the Board. Public comments will need to be submitted to [ruth.hopkins@lebanon.k12.or.us](mailto:ruth.hopkins@lebanon.k12.or.us) by 4:00 PM on June 25, 2020. The Chair will read them into the record at this time.

**3. LEBANON HIGH SCHOOL UPDATE, pg 3** **Action: Informational**

**4. SUMMER SCHOOL UPDATE** **Action: Informational**

**5. PRELIMINARY PLAN FOR FALL OF 2020-21 SCHOOL YEAR** **Action: Informational**

**6. JULY MEETING DATE** **Action: Discussion**

**7. FISCAL YEAR 2020-21 BUDGET HEARING, pg 6** **Action: Approval Requested**

- A. Resolution #1920-06 Making Appropriation for the 2020-21 Budget
- B. Resolution #1920-07 Imposing and Categorizing the Tax

**8. CONSTRUCTION EXCISE TAX, pg 10** **Action: Approval Requested**

**9. CONSENT AGENDA, pg 18** **Action: Approval Requested**

- A. May 14, 2020 Meeting Minutes
- B. June 4, 2020 Special Meeting Minutes
- C. June 11, 2020 Budget Committee Meeting Minutes
  
- D. Policies – First Reading, **pg 32**

<b>CODE</b>	<b>TITLE</b>
JHH	Student Suicide Prevention
GBL	Personnel Records
GBLA	Disclosure of Information
GBN/JBA GBN/JBA – AR JBA/GBN JBA/GBN - AR	Sexual Harassment
GBN/JBA GBN/JBA – AR JBA/GBN JBAS/GBN - AR	Sexual Harassment DELETE OLD POLICIES
IGBAH-AR	Special Education – Evaluation and Eligibility Procedures

E. HIRING

<b>NAME</b>	<b>POSITION</b>	<b>FTE</b>	<b>START DATE</b>
Thomas VaVerka	JROTC Senior Army Instructor	1.0	7/1/2020

**10. DEPARTMENT REPORTS**

**Action: Informational**

- A. Operations
- B. Human Resource
- C. Finance, **pg 79**

**11. COMMUNICATION**

**Action: Informational**

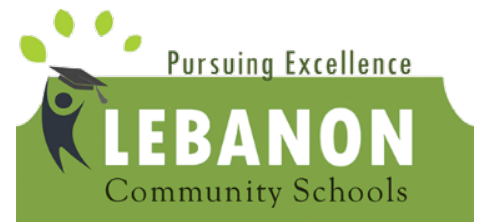
- A. Board
- B. Superintendent

**12. ADJOURNMENT**

*Agenda Item No. 3*

*Lebanon High School Update*

# BOARD MEMORANDUM



**To:** Board of Directors

**From:** Rachel Cannon, Director of Alternative Education

**Date:** 6/16/2020

**Meeting Date:** 6/25/2020

**Re:** Alternative Education Data 2019-2020

## **Background:**

### **Elementary SEL**

- Current Enrollment: 8 students
  - Total enrollment for 2019-2020 school year: 10 students
- Goals:
  - Increase Academic Rigor
  - Align Academics to the programs resident schools use
  - Behavior Professional Development
  - Family Support and partnership
- Future Goals:
  - Increase family support and partnerships with guardians
  - Specific behavior training on de-escalation practices

### **Tutoring/Supervised Independent Study (SIS):**

- Current Enrollment: SIS (2 students- both expelled) & Tutoring (4 students)
- Goals:
  - Lower # of students who need access to tutoring and SIS services
  - Increase Social Emotional Learning use during tutoring and SIS
- Future Goals:
  - Increase support and professional development in resident schools to lower the number of students accessing tutoring and SIS services.
  - Access to family support and partnership

### **Teen Center:**

- Current Enrollment: 18 students (15 students expelled, 3 students placement changes)
  - Total enrollment for 2019-2020 school year: 42 students
- Goals:
  - Behavior Support
  - Social Emotional Learning
  - Hot lunches provided
- Future Goals:
  - Adult Roles Group
  - Specific time set aside for social emotional learning

**Ralston:**

- Current Enrollment: 57 students
  - Total enrollment for 2019-2020 school year: 73 students
- Goals:
  - Options for instruction
  - Skill building
  - Transition and career opportunities
- Future Goals:
  - Experiential learning opportunities cross curricular
  - Staff training in restorative practices and trauma informed practices
  - Strengthening Families program
  - Social Emotional Learning time
  - Create a more in depth PBIS plan

**3 year Alternative Education Graduation Data**

School Year	2017-2018	2018-2019	2019-2020
# of Drop Outs	43	26	8
# of Graduates	7	11	32/36
# of GED	14	12	1

**Recommendation**

None; this is an informational item only.

*Agenda Item No. 7*

*Fiscal Year 2020-21 Budget Hearing*

**RESOLUTION #1920-06 MAKING APPROPRIATION FOR THE 2020-2021 BUDGET**

BE IT RESOLVED that the amounts for the fiscal year beginning July 1, 2020, and for the purposes shown below are hereby appropriated:

**General Fund (100)**

Instruction.....	\$ 27,440,341
Support Services.....	\$ 16,716,523
Enterprise & Community..	\$ -
Other:	
Interest.....	\$ -
Transfers.....	\$ 2,100,000
Contingency.....	\$ 100,000
Unappropriated Ending Fund Balance	\$ 1,900,000
Total.....	<u>\$ 48,256,864</u>

**Special Revenue Funds (200's)**

Instruction.....	\$ 8,020,608
Support Services.....	\$ 3,234,499
Enterprise & Community..	\$ 2,613,639
Facilities Acquist./Const..	\$ 355,000
Transfers.....	\$ 300,000
Contingency.....	\$ -
Unappropriated Ending Fund Balance	\$ 2,914,125
Total.....	<u>\$ 17,437,871</u>

**Debt Service (300's)**

Debt Service.....	\$ 5,531,687
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**Capital Projects (400's)**

Facilities Acquist./Const..	\$ 2,474,249
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**Enterprise Fund (500's)**

Instruction.....	\$ 572,000
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**Internal Service (600's)**

Support Services.....	\$ 300,000
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**Total Appropriations, All Funds \$ 74,572,671**

**TOTAL ADOPTED BUDGET \$ 74,572,671**

Date: June 25, 2020

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Tom Oliver  
Chair, Board of Directors

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Bo Yates  
Superintendent

**RESOLUTION #1920-07 IMPOSING & CATEGORIZING THE TAX**

BE IT RESOLVED that the Board of the Lebanon Community School District #9 hereby imposes the taxes provided for in the adopted budget:

At the rate of 4.9925 per \$1,000 of assessed valued for operations;

In the amount of \$4,044,968 for bonds;

and that these taxes are hereby imposed and categorized for tax year 2020-2021 upon the assessed value of all taxable property within the district as follows:

<b>Education Limitations</b>	<b>Excluded from Limitations</b>
Permanent Rate Tax..... 4.9925 / \$1,000	
Debt Service Levy.....	\$ 4,044,968

Date: June 25, 2020

\_\_\_\_\_  
Tom Oliver  
Chair, Board of Directors

\_\_\_\_\_  
Bo Yates  
Interim Superintendent



**FORM ED-1**

**NOTICE OF BUDGET HEARING**

A public meeting of the Lebanon Community School District will be held on June 25, 2020 at 6:00 pm online via YouTube. The purpose of this meeting is to discuss the budget for the fiscal year beginning July 1, 2020 as approved by the Lebanon Community School District Budget Committee. A summary of the budget is presented below. A copy of the budget may be inspected or obtained at 485 S. Fifth Street, Lebanon, Oregon 97355 between the hours of 8:00 a.m. and 4:00 p.m., or online at <http://lebanon.k12.or.us>. This budget is for an annual budget period. This budget was prepared on a basis of accounting that is the same as the preceding year.

Contact: William Lewis, Business Director

Telephone: 541-259-8945

Email: [william.lewis@lebanon.k12.or.us](mailto:william.lewis@lebanon.k12.or.us)

<b>FINANCIAL SUMMARY - RESOURCES</b>			
<b>TOTAL OF ALL FUNDS</b>	Actual Amount Last Year 2018-19	Adopted Budget This Year 2019-20	Approved Budget Next Year 2020-21
Beginning Fund Balance	\$8,848,105	\$6,608,049	8,563,121
Current Year Property Taxes, other than Local Option Taxes	13,911,026	14,563,240	14,774,781
Current Year Local Option Property Taxes	0	0	0
Other Revenue from Local Sources	2,368,311	2,096,650	1,991,000
Revenue from Intermediate Sources	243,273	165,000	535,000
Revenue from State Sources	30,408,417	32,899,500	40,800,195
Revenue from Federal Sources	4,621,245	5,062,756	5,008,574
Interfund Transfers	2,776,742	2,035,000	2,400,000
All Other Budget Resources	99,847	377,000	500,000
<b>Total Resources</b>	<b>\$63,276,967</b>	<b>\$63,807,195</b>	<b>\$74,572,671</b>

<b>FINANCIAL SUMMARY - REQUIREMENTS BY OBJECT CLASSIFICATION</b>			
Salaries	\$23,826,190	\$24,827,026	\$26,619,932
Other Associated Payroll Costs	14,838,368	16,457,190	18,909,813
Purchased Services	6,325,801	6,707,044	7,769,443
Supplies & Materials	2,962,664	4,016,841	4,353,310
Capital Outlay	913,330	524,500	3,364,249
Other Objects (except debt service & interfund transfers)	471,759	610,935	700,113
Debt Service*	4,019,471	4,117,035	4,066,266
Interfund Transfers*	2,776,742	2,185,000	2,400,000
Operating Contingency	0	100,000	100,000
Unappropriated Ending Fund Balance & Reserves	7,142,643	4,261,625	6,289,546
<b>Total Requirements</b>	<b>\$63,276,967</b>	<b>\$63,807,195</b>	<b>\$74,572,671</b>

<b>FINANCIAL SUMMARY - REQUIREMENTS AND FULL-TIME EQUIVALENT EMPLOYEES (FTE) BY FUNCTION</b>			
1000 Instruction	\$29,481,231	\$31,518,130	\$35,460,949
FTE	342	330	382
2000 Support Services	17,656,418	19,115,269	20,241,021
FTE	173	170	175
3000 Enterprise & Community Service	2,022,331	2,440,137	2,613,639
FTE	21	22	22
4000 Facility Acquisition & Construction	178,131	70,000	3,401,249
FTE	0	0	0
5000 Other Uses	0	0	0
5100 Debt Service*	4,019,471	4,117,035	4,066,266
5200 Interfund Transfers*	2,776,742	2,185,000	2,400,000
6000 Contingency	0	100,000	100,000
7000 Unappropriated Ending Fund Balance	7,142,643	4,261,625	6,289,546
<b>Total Requirements</b>	<b>\$63,276,967</b>	<b>\$63,807,195</b>	<b>\$74,572,671</b>
<b>Total FTE</b>	<b>536</b>	<b>521</b>	<b>578</b>

\* not included in total 5000 Other Uses. To be appropriated separately from other 5000 expenditures.

<b>STATEMENT OF CHANGES IN ACTIVITIES and SOURCES OF FINANCING **</b>
During 2020-21 the district will receive a Seismic Rehabilitation Grant, additional funds from the State School Investment Act, and Federal Elementary and Secondary School Emergency Relief Funds.

<b>PROPERTY TAX LEVIES</b>			
	Rate or Amount Imposed	Rate or Amount Imposed	Rate or Amount Approved
Permanent Rate Levy (Rate Limit 4.9925 per \$1,000)	4.9925	4.9925	4.9925
Local Option Levy			
Levy For General Obligation Bonds	\$3,886,775	\$3,922,363	\$4,044,968

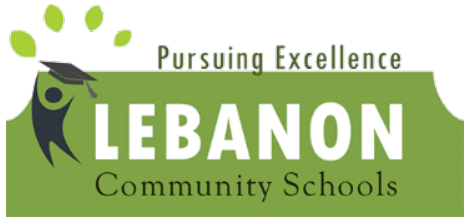
<b>STATEMENT OF INDEBTEDNESS</b>		
<b>LONG TERM DEBT</b>	Estimated Debt Outstanding on July 1	Estimated Debt Authorized, But Not Incurred on July 1
General Obligation Bonds	\$44,737,072	
Other Bonds	\$757,998	
Other Borrowings		
<b>Total</b>	<b>\$45,495,070</b>	

\*\* If more space is needed to complete any section of this form, insert lines (rows) on this sheet. You may delete blank lines.

*Agenda Item No. 8*

*Construction Excise Tax*

# BOARD MEMORANDUM



**To:** The Honorable Chair and Members  
Lebanon Community School District Board of Directors

**From:** William H. Lewis III, Business Director

**Date:** June 23, 2020

**Meeting Date:** June 25, 2020

**Re:** CET Update

**Construction Excise Tax Update**

As reported in our monthly financial report administration has been working with Linn County on the construction excise tax intergovernmental agreement. The district received the long awaited draft of the IGA on Thursday afternoon June 18. Upon review of the IGA administration in consultation with the district’s attorney revised the district’s CET implementation strategy. State statute does not require approval by all local governments at the same time. Administration recommends the board approve the intergovernmental agreement between the City of Lebanon and the school district. The approval of this document is one of the last key steps towards implementation of the construction excise tax with the City. Upon approval the district will finalize all CET details with the City of Lebanon.

The school district will continue to work with Linn County toward an intergovernmental agreement where both organizations work in partnership to implement the construction excise tax.

# BOARD RESOLUTION

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**To:** The Honorable Chair and Members  
Lebanon Community School District Board of Directors

**From:** William H. Lewis III, Business Director

**Date:** June 23, 2020

**Meeting Date:** June 25, 2020

**Re:** Imposition of Construction Excise Tax

## **Background**

In 2007 the Oregon Legislature passed Senate Bill 1036, a law that provides a financial tool to help school districts pay for capital improvements, expanded facilities, and equipment needed as a result of community growth. The law authorizes a school district, in cooperation with cities and counties, to tax new residential and non-residential development.

## **Recommendation**

It is recommended that the Board approve the Imposition of Construction Excise Tax.

## **Resolution #1920-8 Imposition of Construction Excise Tax**

**Whereas:** the District has a critical need to build new facilities and improve existing school facilities; and

**Whereas:** the Oregon Legislative Assembly passed Senate Bill 1036, authorizing school districts to impose construction excise taxes to fund capital improvements to school facilities; and

**Whereas:** pursuant to Section 5 of Senate Bill 1036 (2007), the District has entered into an intergovernmental agreement with The City of Lebanon; and

**Whereas:** pursuant to Section 5 of Senate Bill 1036 (2007), this intergovernmental agreement

establishes: (a) collection duties and responsibilities; (b) the Lebanon Community School District #9 account into which construction tax revenues are to be deposited and the frequency of such deposits; and (c) the amount of the administrative fee of 4% that the entity collecting the tax may retain to recoup its expenses in collecting the tax.

**Be It Resolved** as follows:

1. The rates of tax, imposed only on improvements to real property that result in a new structure or additional square footage in an existing structure, with the exemptions outlined in Senate Bill 1036, are:
  - (a) Amount not exceeding \$1.25 per square foot on structures or portions of structures intended for residential use, including but not limited to single-unit or multiple-unit housing; and
  - (b) Amount not exceeding \$0.62 per square foot on structures or portions of structures intended for nonresidential use, not including multiple-unit housing of any kind.
2. In addition, a construction tax imposed on structures intended for nonresidential use will not exceed \$33,700 per building permit or \$33,700 per structure, whichever is less.
3. For years beginning on or after June 30, 2020, the tax rates stated in this resolution shall be adjusted for changes in construction costs. The Oregon Department of Revenue will determine the adjusted rate limitations and report to the District.
4. The construction excise tax shall be assessed and collected pursuant to the provisions of Senate Bill 1036 (2007).
5. This resolution takes effect on July 1, 2020.

Approved: \_\_\_\_\_  
Date

Signed: \_\_\_\_\_  
Board Chair

**INTERGOVERNMENTAL AGREEMENT BETWEEN  
LEBANON COMMUNITY PUBLIC SCHOOL DISTRICT #9 AND THE  
CITY OF LEBANON TO  
COLLECT AND REMIT CONSTRUCTION EXCISE TAX**

This Construction Excise Tax Intergovernmental Agreement to collect and remit Tax (“CET Collection IGA”) is effective on the last date of signature below, and is by and between the Lebanon Community Public School District #9, a school district organized under the laws of the state of Oregon (“LCSD”), and the City of Lebanon (“City”) collectively referred to as “Parties.”

**WHEREAS**, ORS Chapter 190 authorizes the Parties to enter into written agreements for the performance of any or all functions and activities that either entity has the authority to perform on its own; and

**WHEREAS**, Senate Bill 1036, which was adopted by the 2007 Legislature and became effective on September 27, 2007, authorizes LCSD, as defined in ORS 330.005, to impose a Construction Excise Tax (“CET”) to fund capital improvements to school facilities; and

**WHEREAS**, LCSD desires to adopt a CET; and

**WHEREAS**, Section 5 of Senate Bill 1036 provides that the Construction Excise Tax shall be collected by local cities and remitted pursuant Intergovernmental Agreements; and

**WHEREAS**, Pursuant to Chapter 829, Oregon Laws 2007 (SB 1036), LCSD will adopt a Resolution establishing a Construction Excise Tax (“CET”) throughout its regional jurisdiction. The Resolution will provide that a Construction Excise Tax be collected by the City and remitted to LCSD pursuant to this Intergovernmental Agreement. The Parties desire to agree to certain procedures needed to collect the Construction Excise Tax and remit the tax to LCSD.

**NOW, THEREFORE**, the Parties hereby agree to the following:

1. Information and Forms. City shall provide all forms and information necessary to collect the CET and LCSD will provide all necessary information to assist the City in doing so.

2. Staffing. City shall provide sufficient staff to implement the CET program, including but not limited to, sufficient staff to calculate and collect the CET.

3. Collection Rate. City shall collect LCSD’s CET at the rate set by resolution by the District, but not to exceed the maximum limitations of ORS 320.176(2), adjusted annually by law. In the event LCSD increases or otherwise modifies the tax, it shall send written notice to the City of the increase or other modification, including a copy of LCSD’s resolution adopting the change. City shall collect the tax at the new rate within ten business days after notice is received by the City, or upon the effective date of the change stated in LCSD’s resolution, whichever is later.

4. Collection; Start date. City agrees to collect the CET on behalf of LCSD for those properties within LCSD and within the City. The City shall begin collecting the CET for all building permits submitted to the City on or after July 1, 2020 that are subject to the CET as prescribed in the LCSD resolution. The City shall continue collection until the CET expires, the underlying statutory authority is repealed, the program is terminated by LCSD, or this CET Collection IGA is terminated by either LCSD

or the City, as provided herein. The City agrees to collect the CET in conjunction with the collection of other building permit fees, if any, upon issuance of a building permit.

5. Exemptions. LCSD shall provide the City with all forms necessary for CET exemptions, rebates, and refunds, and any other forms or information necessary for implementation of the CET. If a Person or entity asserts that it is exempt from the CET and files a CET Exemption Form at the time the CET would otherwise be due, the City shall grant the exemption. It shall be LCSD's responsibility to determine the validity of the exemption and to institute collection procedures to obtain payment of the CET, as well as any other remedy LCSD may have under law, if the Person was not entitled to the exemption. The CET exemption form shall inform the Person or entity, that LCSD has the right to contest the claim of exemption and the claim of exemption will be tried in the Circuit Court for the County in which the real property is located. If the Person or entity is not successful, LCSD shall be entitled to recover the tax due, plus interest from the date when due at the rate of 1% per month, or any portion of a month, together with all costs, including but not limited to, any expert witness fees, attorney fees and all other costs and expenses as allowed by law, whether by administrative rule, statute or civil procedure.

LCSD recognizes that the CET will not apply to commercial or residential remodels which do not add square footage, even in those circumstances where Building Permit fees are charged by the City.

6. Remittance. The City shall remit the collected CET to LCSD. Remittance shall be quarterly by the 30th of the month following the end of each quarter. Quarters end on March 31, June 30, September 30, and December 31 of each year. CET remittance shall be deposited directly into LCSD's LGIP account via electronic funds transfer.

7. CET Reports. Along with the CET remittance, the City shall prepare and submit to LCSD a report of the CETs to include: the aggregate amount of CET paid, the amount of CET administrative fee retained by the City, if any, and a list or copy of forms for all persons that were given an exemption from paying the CET.

8. Failure to Pay CET. Upon a person's refusal or failure to pay the CET when due, the City will not issue that person's building permit until the fee is paid. The City shall treat a refusal to pay the CET the same as a refusal to pay the protection of the fee attributable to the State of Oregon or the City.

9. Records. The City shall make all records related to building permit activity, Construction Excise Tax collections, and CET exemptions available to LCSD, or its designated auditors, as necessary for LCSD to audit Construction Excise Tax collections. Records production may be subject to the City's customary charges and procedures for the inspection and copying of public records. This Agreement shall not obligate City Staff to prepare reports or documents other than as required in response to public records requests or to undertake any other work or activities, except as stipulated in the section, unless a satisfactory agreement is reached between the parties to compensate the City therefore.

10. Administrative Fee. As consideration for the above described services, the City shall retain 4% of the CET collected by the City as authorized by Section 5 of Senate Bill 1036. This administrative fee sum shall be retained by the City to compensate the City for its actual expenses in collecting the CET even in those circumstances where it was subsequently determined that the CET was wrongfully collected. Prior to submitting the CET to LCSD, the City shall deduct this administrative fee directly from the CET collected, and the amounts deducted and retained shall be reported to LCSD. The administrative fee is based on gross CET collected and shall not be reduced by CET refunds or any checks returned for insufficient funds.

11. Amendment. This CET Collection IGA may be amended by mutual written agreement of the *Construction Excise Tax Collection IGA*

Parties. The parties further agree to negotiate in good faith to amend this agreement should Senate Bill 1036 be amended by subsequent legislation or judicial proceedings so that this agreement is consistent with the most current legislation. Refusal to negotiate an amendment to this agreement is grounds for immediate termination.

12. Other Agreements. This CET Collection IGA does not affect or alter any other agreements between LCSD and the City.

13. Defense and Indemnification. LCSD agrees to defend, indemnify and hold harmless the City, and its officers, agents and employees, against all claims and actions, and all damages and expenses related thereto, arising from the City's performance of this agreement, except for those caused by the sole negligence of the City or its officers and employees.

14. Termination. Either party may terminate this agreement for any reason upon 365 days written notice to the other party. Upon such termination, neither party shall have any remaining responsibilities to the other concerning the subject of this Agreement.

15. Notice. Whenever notice is required to be given under this Agreement, the notice shall be given in writing to the other party's contact person by US Mail, first class postage prepaid. In addition, notice may be given by email or personal delivery.

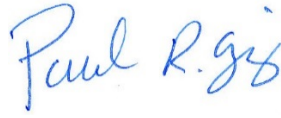
16. General Provisions. This Agreement is binding on an inures to the benefit of Parties and their successors and assigns. Except with the other party's prior written consent, a party may not assign any rights or delegate any duties under this Agreement. The headings used in this Agreement are solely for convenience of reference, are not part of this Agreement, and are not to be considered in construing or interpreting the Agreement. This Agreement sets forth the entire understanding of Parties with respect to the subject matter of this Agreement and supersedes any and all prior understandings and agreements, whether written or oral, between Parties with respect to such subject matter. A provision of this Agreement may be waived only by a written instrument executed by the party waiving compliance. No waiver of any provision of this Agreement shall constitute a continuing waiver. Failure to enforce any provision of this Agreement shall not operate as a waiver of such provision or any other provision. From time to time, each of the parties shall execute, acknowledge, and deliver any instruments or documents necessary to carry out the purposes of this Agreement. Nothing in this Agreement, expressed or implied, is intended to confer on any person, other than the parties to this Agreement, any right or remedy of any nature whatsoever. Each party shall bear its own expenses in connection with this Agreement and the transactions contemplated by this Agreement.

**SIGNATURES ON FOLLOWING PAGE**



**LEBANON COMMUNITY SCHOOL DISTRICT**

**CITY OF LEBANON**



\_\_\_\_\_  
By:  
Title: Chairperson, Board of Directors

\_\_\_\_\_  
By: Paul R. Aziz  
Title: Mayor

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

Date: 4-8-2020

# **Consent Agenda**

## **Agenda Item No. 9**

*May 14, 2020,  
June 4, 2020 and  
June 11, 2020 Minutes*



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**MEETING MINUTES**

<b><u>BOARD MEMBERS PRESENT:</u></b> Tom Oliver, Board Chair Richard Borden, Member Tammy Schilling, Member Todd Gestrin, Member  Mike Martin, Board Vice Chair, Absent	<b><u>EXECUTIVE STAFF PRESENT:</u></b> Bo Yates, Superintendent Jennifer Meckley, Assistant Superintendent Tami Volz, Director of School Improvement William Lewis, Business Director Rachel Cannon, Director of Alternative Education
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The meeting minutes were recorded by Executive Secretary Ruth Hopkins, as part of a Zoom meeting.

**1. WELCOME AND CALL TO ORDER**

Chair Tom Oliver called the meeting to order at 6:02 PM and led the Pledge of Allegiance.

**2. AUDIENCE COMMENTS**

Staff member Anne Williams submitted a comment for the Board, which was read into the record by Chair Tom Oliver.

**3. DISTANCE LEARNING UPDATE**

Tami Volz provided feedback from the elementary schools, as well as curriculum, instruction and assessment. Many are using iReady, which is the online program that the district has been piloting for the K-8 classrooms.

For Smarter Balance assessments has not been completed for this year because of the school closures. The statewide assessment for kindergarten for 20-21 has been waived for the fall assessment.

School principals have been collecting attendance data and she provided an overview on the attendance data for the elementary schools.

Rachel Cannon then provided a short update on the LHS and SOK distance learning attendance. She mentioned that all schools have mentioned that it has been positive to be able to connect with students and families and to build those relationships that have been built during this time. She then reviewed the information she provided to the Board and has been made a part of these minutes. She added that students will talk with teachers and will talk with the A Team, but are not doing the school work consistently.

Chair Oliver asked how that compared with what the districts around us were experiencing.

Rachel Cannon shared that, anecdotally, they seem to be experiencing the same issues, but she will get information from them to provide to the board at the next meeting.

Richard Borden asked about the attendance rate being so high and wondered if was something that could be attributed to the gap, such as technology or internet needs.

Rachel Cannon responded that the technology team has been great in taking care of technology needs as they come up. She indicated that most of the time it is students thinking the work is too hard, no motivation, or the students have a job. A lot of students need to motivation at school that comes from teachers and peers to stay engaged.

Superintendent Yates added that the district is trying to deal with that on an individual basis, based on what a family's specific needs are.

Richard Borden then asked if it was the same students that were having attendance issues before COVID or if we were sifting that out. Superintendent Yates indicated that attendance was not being tracked on a specific student level at this point.

Rachel Cannon then covered the information for Seven Oak. They have had 86 percent of students who have signed on to their online learning program, and the average of daily users was about 50% on April 9<sup>th</sup>, but has now dropped down to 30% percent of students who are now doing daily work. Seven Oak has more students accessing paper packets than at the high school, and they have seen an increase in students who want them and students who return them. Seven Oak counselors have created an online Google classroom that has daily Spartan self-care challenges for students.

Chair Tom Oliver asked about weekly data on attendance for Seven Oak and Rachel Cannon will provide that for the June meeting.

Rachel Cannon then provided information on Ralston Academy and the Teen Center. They have 75% of students who participate in the distance learning through Zoom and Google Classroom, and the other 25% participate over the phone, where teachers do lessons individually with a student over the phone. They connect with all of the students every week.

At the Teen Center, they have been able to connect with all students but one, and they have been trying to reach out to that student.

The issues have been the same at Ralston and the Teen Center for student engagement.

#### **4. FUNDING UPDATE**

Superintendent Yates shared that we are anticipating a \$2-3 billion funding shortage. We are being advised to budget at the \$9 billion mark, which would be full funding for this year, which would include the SIA funding. The district has been trying to reduce our spending for this year and stay on top of what is going to happen with the budget moving forward. We do not know what the budget shortfall will be, but we are looking at a 17% reduction in the biennium. Currently, we are trying to get close to running the school as close as possible to the regular budget next year. He mentioned that this will be a long-term problem for the district and that we will need to be diligent with our spending and try to be as proactive as possible to raise our ending fund balance for this year so that there is a higher beginning fund balance for next year. He said it will be a challenge for us that will not go away and we will need to be cautious in our spending.

Chair Oliver added that we will know more next week when the forecast comes out.

#### **5. FURLOUGH DAYS**

Assistant Superintendent Jennifer Meckley started with asking about May 22 as a make-up day for March 13<sup>th</sup>. May 22<sup>nd</sup> was a make-up day already built into the school calendar and she is hoping the Board will let us take that as a make-up day for March 13.

She then presented information on furlough days for the district. The district is trying to prevent taking a lot of furlough days next year, working to save jobs and to take advantage of the Oregon Work Share program. The program allows the district to reduce employee hours between 20 and 40

percent each week and that will allow employees to receive unemployment benefits for that portion of their work week. At this time, employees are able to access the federal \$600 a week benefit as well.

The district is requesting eight furlough days for this year.

William Lewis provided the financial benefit of \$1.25 million in savings to the general fund salaries and benefits. We have been trying to save in cost of utilities, supplies and other items, and those will be added to the furlough day savings as well.

Richard Borden asked what the fuel cost savings has been since we have not been running school buses. William Lewis indicated that the fuel savings was \$125,000, which is at a 70% reimbursement rate.

Superintendent Yates added that we have savings from not having to hire substitutes. He also clarified the request from Meckley regarding the snow day make-up day of May 22 as a furlough day. He also added that by using the federal relief fund, that we are using everything we can to help support our staff and educate students. He added that trading distance learning days this year for classroom days next year will be good investment for us.

Richard Borden asked how many staff members were not eligible for furlough days. To which Kim Grousbeck responded that there were about 50 individuals in the district who will not be eligible for furlough days. They will not be penalized for not taking furlough days, they will just continue working.

Board Chair Tom Oliver clarified that for the staff taking the furlough days, they will get the prorated unemployment amount, plus the \$600 a week in additional funds, so potentially some of those employees will have a higher cash salary for those weeks that include furlough days. He clarified that we will not be adjusting their final salary for the year for PERS calculations and that there will not be the 6% IAP added for the furlough days. He added that given the current situation, he does not see how we cannot do this as it is over a million dollars that will not need to be cut from next year's budget.

Assistant Superintendent mentioned that we will need a vote from the board, and then both of the unions will vote on Monday. Once it has been ratified, then the district will send the application in to the state.

Superintendent Yates added that he feels confident that staff will receive the funds, but not 100% confident that they will get it in a timely basis. Therefore, the district will help staff who get caught

short in the event that funds are not received in a timely manner, to make sure that staff are taken care of.

Member Richard Borden asked about the additional \$600 and if it was tied to the unemployment benefits or if they needed to apply for that. Kim Grousbeck added that once staff applied for the unemployment benefits with Oregon, then they do not have to do anything beyond that. Borden followed up by asking if we knew how long that it was taking to receive benefits. Kim Grousbeck responded that everything that she had read said it was taking about 15 days. Chair Tom Oliver clarified that it was 15 working days. Member Todd Gestrin added that the state had posted today that it could be up to 20 working days.

Upon motion made by Richard Borden, duly seconded by Todd Gestrin, the Board voted unanimously to approve the district taking eight furlough days and to add back into the calendar the May 22<sup>nd</sup> make-up day.

## **6. CONSENT AGENDA:**

### **April 23, 2020 Meeting Minutes**

Upon motion made by Richard Borden, and duly seconded by Member Todd Gestrin, the motion was approved by a majority vote to approve the April 23, 2020 meeting minutes, with three ayes and one abstention. Tammy Schilling abstained from the vote as she did not have an opportunity to read the minutes.

## **7. DEPARTMENT REPORTS**

### **A. Operations**

Superintendent Yates shared is very proud of our Food Services Department and the Transportation Department as they are continuing to work together and feed the kids in the district. He also shared that our technology department is doing a great job with only 2.5 people in there.

### **B. Human Resources**

Assistant Superintendent Jennifer Meckley mentioned that the furlough days have been the focus of the HR department.

**C. Finance**

Business Director William Lewis shared the business department has been working the HR to make sure the furlough days go smoothly. He added that the State School Fund is now officially paid. The focus is now on audit prep and looking forward to the 2020-21 budget for next year, which will start next month with the budget meetings.

**8. COMMUNICATION**

**A. Board**

Member Richard Borden mentioned that the OSBA Summer Conference in Bend has now been cancelled.

**B. Superintendent**

Superintendent Yates thanked the group of people that he works with. This work has been challenging and it has been a lot of work to go through this whole process. He added that the principals, teachers and all staff really care about our students and he appreciates all of the work that they are doing. He also thanked the Board as well for all of their help with this and supporting the district through this challenge.

**9. ADJOURNMENT**

There being no further business before the Board, the meeting was adjourned at 6:52 PM and will reconvene in Executive Session after a break.

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Tom Oliver, Chair

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Bo Yates, Superintendent





Zoom Meeting

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## **SPECIAL MEETING MINUTES**

<b><u>BOARD MEMBERS PRESENT:</u></b> Tom Oliver, Chair Mike Martin, Vice Chair Richard Borden  Tammy Schilling, Absent Todd Gestrin, Absent	<b><u>EXECUTIVE STAFF PRESENT:</u></b> Bo Yates, Superintendent Jennifer Meckley, Assistant Superintendent William Lewis, Business Director
---	--

The meeting minutes were recorded by Executive Secretary Ruth Hopkins.

### **1. WELCOME AND CALL TO ORDER**

Board Chair Tom Oliver called the meeting to order at 5:40 PM and led the Pledge of Allegiance.

### **2. APPOINTMENT OF BUDGET COMMITTEE MEMBER**

Business Director William Lewis presented two candidates for the budget committee vacancy, Cory McEldowney and Jason Pottorf. He suggested to Chair Tom Oliver that both candidates be brought forth and make one an official committee member and one an alternate. He has checked laws and there is not anything saying that we are not able to have an alternate. This will be helpful for when there are scheduling conflicts for the meetings.

Chair Tom Oliver and Member Richard Borden were both in favor of having an alternate.

Chair Oliver asked if the Board had any questions of the candidates. There were no questions asked.

Upon motion made by Member Richard Borden, and duly seconded by Vice Chair Mike Martin, the Board voted unanimously to appoint Jason Pottorf as the primary budget committee member to fill the current vacancy.

Upon motion made by Vice Chair Mike Martin, and duly seconded by Member Richard Borden, the Board voted unanimously to appoint Cory McEldowney as the alternate member for the budget committee.

### **3. ADJOURNMENT**

There being no further questions or comments, the meeting was adjourned at 5:46 PM.

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Tom Oliver, Chair

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Bo Yates, Superintendent



**LEBANON COMMUNITY SCHOOL DISTRICT  
BUDGET COMMITTEE MEETING  
JUNE 11, 2020, 6:00 PM**

Zoom Meeting/LHS Library

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**BUDGET MEETING MINUTES**

<p><b><u>BOARD MEMBERS PRESENT:</u></b></p> <p>Tom Oliver, Chair Mike Martin, Vice Chair Richard Borden Tammy Schilling Todd Gestrin</p> <p><b><u>BUDGET COMMITTEE MEMBERS PRESENT:</u></b></p> <p>Jason Pottorf, Chair Todd Gestrin, Vice Chair Terry Deacon William Barish</p> <p>Jeff Vandiver, Absent Kris Latimer, Absent</p>	<p><b><u>EXECUTIVE STAFF PRESENT:</u></b></p> <p>Bo Yates, Superintendent Jennifer Meckley, Assistant Superintendent William Lewis, Business Director</p>
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The meeting minutes were recorded by Executive Secretary Ruth Hopkins.

**1. WELCOME AND CALL TO ORDER**

Budget Committee Chair Jason Pottorf called the meeting to order at 6:01 PM.

**2. CONSENT**

**February 13, 2020 Minutes and June 4, 2020 Minutes**

Upon a motion made by Richard Borden, duly seconded by Mike Martin, the Board voted unanimously to approve the February 13, 2020 budget meeting minutes and the June 4, 2020 budget meeting minutes as presented.

### **3. INFORMATION AND DISCUSSION OF PROPOSED 2020-21 BUDGET**

Business Director William Lewis shared a summary of the 200 account codes on page 142 and 143 of the proposed budget, to provide some clarification on those funds. He mentioned they were often funds that administration liked to have more specific details on, including grants like the NIKE Grant that supports the AVID program. That total of the 200 funds is \$7,437,000. He then shared how the breakout of each fund is provided in the budget document.

He then opened it up for questions from the board members.

Vice Chair Mike Martin asked about the ADM cap and then the additional funds that are listed. William Lewis explained that we have an 18% special education population. The cap says that we will pay 1:1 at 11%, then the additional funds come with assisting the special education population. He further explained that we receive approximately \$8,000 per student from the state. Special education students are about double that at \$16,000, which does not cover the cost of resources to support those students as some of them take \$100,000 in resources to support for the school year.

Vice Chair Mike Martin then asked about the bus drivers listed on page 22, line 134 of the budget document, since it dropped from \$200,000 to zero. William Lewis explained that the business department changed the accounting of where the bus drivers are charged to. He said that represented extra duty for the bus drivers, so anything that was over an 8-hour day. That is now being charged to line 131. He added that the budget has been tightened up, so there is not a cushion listed there, in light of our current budgeting issues. He noted that we will have to maintain the flexibility in the budget to be able to adjust to what our fall will look like for the schools and students. He said he will probably need to come back to the board more often this year, because there will have to be budget adjustments.

Vice Chair Mike Martin then asked about the summer school funding, since it is decreased. William Lewis explained that from the general fund, with the furlough days, that will roll over to pay for high school summer school. The other part is covered by Measure 98, student investment account and title funds.

Vice Chair Mike Martin then asked about line 2115, student safety, as it is a huge jump. William Lewis answered that it was not a huge increase, it was an accounting change. He indicated that it was being taken out of classified and put into there, so it was just correcting where it was charged to.

On page 16, second chart, Vice Chair Mike Martin asked about the contingency of \$100,000 and why it was not there previously, but it is now. William Lewis explained that a contingency is your true emergency fund and that it cannot be spent without the approval of the Board. It covers cash needs and is more of a liquid cash flow.

Budget Vice Chair Todd Gestrin asked about the general fund transfer and if it was identified by the auditors or if it was something that was just done. William Lewis explained it was a savings account for the district to cover extra expenses that come up like textbooks, unemployment costs, and athletics. The largest cost is athletics, of which the district covers \$400,000 and the rest is covered by revenue from gate fees and student fees.

Member Tammy Schilling asked about some of the decreases and what were some of the surprises that the community might see in changes, like health services. William Lewis explained that a lot of that has been shifted into the SIA budget. He mentioned there will not be a lot of change with the big ticket items. He added that we are basing the budget on pre-COVID balances, and therefore that might change when we get another number from the state. This year we will not see a lot of impact. The next two years is where we will really see the impact, in the 2020-22 biennium, as we do not know what extra money we will receive in the next biennium and that is where the impact will be the hardest hit.

#### **4. BUDGET COMMITTEE FINAL COMMENTS**

There were no further comments from the board or budget committee.

#### **5. PUBLIC COMMENT**

There were no public comments.

#### **6. APPROVAL OF BUDGET AND TAX LEVIES**

Vice Chair Mike Martin read into the record the approval of the 2020-21 proposed budget and tax levy.

Upon a motion made by Vice Chair Mike Martin, duly seconded by Member Richard Borden, the board voted unanimously to approve the 2020-21 proposed budget of \$74,573,822 and the tax levy for 2020-21 as presented.

**7. ADJOURNMENT**

There being no further questions or comments, the meeting was adjourned at 6:41 PM.

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Jason Pottorf, Chair

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Bo Yates, Superintendent

**Motion to Approve the Budget**

*“I move that the budget committee of the Lebanon Community School District has reviewed and hereby approves the budget for the 2020-2021 fiscal year in the amount of \$74,573,822. This is comprised of:*

<b>All Funds</b>	<b>2020-2021 PROPOSED</b>
General Fund	\$ 48,256,864
Special Revenue	\$ 17,439,022
Debt Service	\$ 5,531,687
Capital Projects	\$ 2,474,249
Enterprise	\$ 572,000
Internal Services	\$ 300,000
<b>Grand Total</b>	<b>\$ 74,573,822</b>

**Motion to Approve Taxes**

*“I move that the budget committee of the Lebanon Community School District #9 approves taxes for the 2020-2021 fiscal year, at the rate of 4.9925 per \$1,000 of assessed value for operating purposes in the General Fund and \$4,044,968 for the general obligation bond levy in the Debt Service Fund for principal and interest.”*

\_\_\_\_\_  
Jason Pottorf  
Budget Committee Chair

\_\_\_\_\_  
Bo Yates  
Superintendent

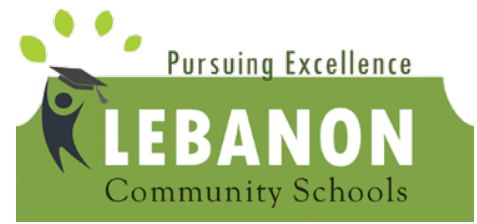
# **Consent Agenda**

## *Agenda Item No. 9*

### *Policies – First Reading*



# BOARD MEMORANDUM



**To:** Board of Directors

**From:** Jennifer Meckley, Assistant Superintendent

**Date:** 6/18/2020

**Meeting Date:** 6/25/2020

**Re:** OSBA Policy Updates

Attached are the May 2020 policy updates from OSBA and the recommendations for adoption.

**OSBA February POLICY UPDATES – REVIEW AND RECOMMENDATIONS**

<b>Code</b>	<b>Title</b>	<b>OSBA Recommendation</b>	<b>DO Staff Lead(s)</b>	<b>Changes/DO Staff Comments</b>	<b>Recommend Adoption? (Yes/No)</b>
JHH	Student Suicide Prevention	Required - New	Jen	SB 52 (Adi's Act) directs districts to adopt a policy requiring a comprehensive plan on student suicide prevention K-12.	Yes
GBL	Personnel Records	Required	Jen/Kim	Updates per SB 155 regarding release of personnel records	Yes
GBLA	Disclosure of Information	Highly Recommended	Jen/Kim	Updates per SB 155 regarding release of personnel records	Yes
GBN/JBA GBN/JBA - AR JBA/GBN JBA/GBN - AR	Sexual Harassment	Required	Jen	Updates per HB 3077 which provides a new definition of sexual harassment (includes sexual assault), clarifies certain aspects of the reporting and investigating process, and requires the allocation of resources to support individuals who report sexual harassment.	Yes
IGAH-AR	Special Education- Evaluation and Eligibility Procedures	Required	Jan	Updated language to comply with OAR 581-015-2115 and the passage of SB 13 and 16.	Yes



## A NOTICE FROM THE DIRECTOR OF POLICY SERVICES

“This is my last *Policy Update* as I am retiring June 30, 2020 after 13 years at OSBA and 45 years in education. I want to thank you for all you do for the children of Oregon and it has been an honor and a pleasure to serve as your director of policy services.”

—Peggy Holstedt

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## CONTENTS

GBL – Personnel Records \*, Required  
GBLA – Disclosure of Information, Highly Recommended  
GBN/JBA – Sexual Harassment, Required, *New Version*  
GBN/JBA-AR – Sexual Harassment Complaint Procedure, Required, *New Version*  
IGBAH-AR – Special Education – Evaluation and Eligibility Procedures\*\*, Required  
JBA/GBN – Sexual Harassment, Required, *New Version*  
JBA/GBN-AR – Sexual Harassment Complaint Procedure, Required, *New Version*  
JHH – Student Suicide Prevention\*\*, Required, *New*

*Policy Update* is a quarterly subscription publication of the Oregon School Boards Association

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If you have questions regarding this publication or OSBA, please call our offices:

503-588-2800 or 800-578-6722

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## RELEASE OF PERSONNEL RECORDS

### Summary

Senate Bill 155 (2019) updated statute affecting release of personnel records when requests are received.

### Legal Reference

None

### Collective Bargaining Impact

Review collective bargaining language related to personnel records.

### Local District Responsibility

Review the recommendations and consider adopting the recommended changes.

### Policy Implications

GBL – Personnel Records \*, Required

GBLA – Disclosure of Information, Highly Recommended

This publication is designed to provide accurate and authoritative information regarding the subject matter covered. It is furnished with the understanding that policies should be reviewed by the district's legal counsel.

## **SEXUAL HARASSMENT**

### **Summary**

House Bill 3077 (2019) provides a new definition of sexual harassment (includes sexual assault), clarifies certain aspects of the reporting and investigating process, and requires the allocation of resources to support individuals who report sexual harassment.

### **Legal Reference**

None

### **Collective Bargaining Impact**

None

### **Local District Responsibility**

It is recommended that the district review the recommended language, revise and recommend the Board readopt the policy and revise and review the administrative regulation.

### **Policy Implications**

GBN/JBA – Sexual Harassment, Required

GBN/JBA-AR – Sexual Harassment Complaint Procedure, Required

JBA/GBN – Sexual Harassment, Required

JBA/GBN-AR – Sexual Harassment Complaint Procedure, Required

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## **SPECIAL EDUCATION - EVALUATION AND ELIGIBILITY PROCEDURES**

### **Summary**

At its March 2020 meeting the Oregon State Board of Education adopted revisions to Oregon Administrative Rule (OAR) 581-015-2115 resulting from passage of Senate Bills 13 and 16 (2019).

### **Legal Reference**

None

### **Collective Bargaining Impact**

None

### **Local District Responsibility**

It is recommended that the district review the recommended revisions and adopt this required administrative regulation.

### **Policy Implications**

IGBAH-AR – Special Education – Evaluation and Eligibility Procedures\*\*, Required

## **STUDENT SUICIDE PREVENTION**

### **Summary**

Senate Bill (SB) 52, also known as Adi's Act and passed by the 2019 Legislature, directs districts to adopt a policy requiring a comprehensive plan on student suicide prevention for students in kindergarten through grade 12.

### **Legal Reference**

None

### **Collective Bargaining Impact**

None

### **Local District Responsibility**

It is recommended that the district review the new required sample model board policy JHH - Student Suicide Prevention and board adopt as required by Oregon Revised Statute (ORS) 339.343.

### **Policy Implications**

JHH – Student Suicide Prevention\*\*, Required, *New*

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## ***ABOUT POLICY UPDATE***

*Policy Update* is a quarterly subscription newsletter providing a brief discussion of current policy issues of concern to Oregon school districts, education service districts, community colleges, and public charter schools.

Sample model policies reflecting these issues and changes in state and federal law, if applicable, are part of this newsletter. These samples are offered as a starting point for drafting local policy and may be modified to meet particular local needs. They do not replace district legal counsel advice.

To make the best use of *Policy Update*, we suggest you discuss the various issues it presents and use the sample model policies to determine which policies your district should develop or revise, get ideas for what a policy should contain, and as a starting point for editing, modifying and discussing your district's policy position.

If you have questions about *Policy Update*, sample policies or policy in general, call OSBA Policy Services, 800-578-6722 or 503-588-2800.

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## **TRY OUR ONLINE POLICY DEMO**

OSBA's online policy service has a demo site for districts interested in a public online policy manual. This service saves time, resources and reams of paper. With one centrally located policy manual updated electronically, you have instant access to current district policies.

Go to [policy.osba.org](http://policy.osba.org) and select "Policy Online Demo." The online manual includes a subscription to *Policy Update* and policy manual maintenance service to help keep policies current.

OSBA offers several options. Contact Policy Services to determine the best option for you, 800-578-6722 or 503-588-2800.

Code: JHH  
Adopted:

## Student Suicide Prevention\*\*

The district shall develop a comprehensive student suicide prevention plan for students in kindergarten through grade 12.

The district may consult with state or national suicide prevention organizations, the Oregon Department of Education (ODE), school-based mental health professionals, parents, guardians, employees, students, administrators and school boards associations when developing the required plan.

The plan shall include, at a minimum:

1. Procedures relating to suicide prevention, intervention and activities that reduce risk and promote healing after a suicide;
2. Identification of the school officials responsible for responding to reports of suicidal risk;
3. A procedure by which a person may request the district to review the actions of a school in responding to suicidal risk;
4. Methods to address the needs of high-risk groups, including:
  - a. Youth bereaved by suicide;
  - b. Youth with disabilities, mental illness or substance abuse disorders;
  - c. Youth experiencing homelessness or out of home settings, such as foster care; and
  - d. Lesbian, gay, bisexual, transgender, queer and other minority gender identity and sexual orientation, Native American, Black, Latinx, and Asian students.
5. A description of, and materials for, any training to be provided to employees as part of the plan, which must include:
  - a. When and how to refer youth and their families to appropriate mental health services; and
  - b. Programs that can be completed through self-review of suitable suicide prevention materials.
6. Supports that are culturally and linguistically responsive;
7. Procedures for reentry into a school environment following a hospitalization or behavioral health crisis<sup>1</sup>; and
8. A process for designating staff to be trained in an evidence-based suicide prevention program.<sup>2</sup>

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<sup>1</sup> “Behavioral health crisis” as defined by Oregon Administrative Rule (OAR) 581-022-2510, means a disruption in an individual’s mental or emotional stability or functioning resulting in an urgent need for immediate treatment to prevent a serious deterioration in the individual’s mental or physical health.

<sup>2</sup> ODE will provide a list of available programs.

The plan must be written to ensure that a district employee acts only within the authorization and scope of the employee’s credentials or licenses.

The plan must be available annually to the community of the district, including district students, their parents and guardians, and employees and volunteers of the district, and readily available at the district office and on the district website.

END OF POLICY

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**Legal Reference(s):**

[ORS 332.107](#)

[ORS 339.343](#)

[OAR 581-022-2510](#)

# OSBA Model Sample

Code: JBA/GBN-AR

Revised/Reviewed:

## Sexual Harassment Complaint Procedure

Principals, the compliance officer and the superintendent have responsibility for reports, complaints and investigations concerning sexual harassment. The investigator(s) shall be a neutral party having had no involvement in the complaint presented.

Step 1 Any sexual harassment information (i.e., reports, complaints, rumors, etc.) shall be presented to district officials, this includes officials such as the principal, compliance officer or superintendent. All such information shall be reduced to writing and will include the specific nature of the sexual harassment and corresponding dates.

The district official receiving the complaint shall cause the district to provide written notice from the district to the complainant that includes:

1. The rights of the student, student's parents, staff member, person or person's parents who filed the complaint;
2. Information about the internal complaint processes available through the school or district that the student, student's parents, staff member, person or person's parents may pursue, including the person designated for the school or district for receiving complaints;
3. Notice that civil and criminal remedies that are not provided by the school or district may be available to the complainant through the legal system and that those remedies may be subject to statutes of limitation;
4. Information about services available to the student or staff member complainant through the school or district including any counseling services, nursing services or peer advising;
5. Information about the privacy rights of the student, student's parents, staff member, person or person's parents and legally recognized exceptions to those rights for internal complaint processes and services available through the school or district;
6. Information about, and contact information for, state and community-based services and resources that are available to persons who have experienced sexual harassment; and
7. Notice that students who report information about possible prohibited conduct and students who participate in an investigation under this policy may not be disciplined for violations of the district's drug and alcohol policies that occurred in connection with the reported prohibited conduct and that were discovered as a result of a prohibited conduct report or investigation unless the student gave another person alcohol or drugs without the person's knowledge and with the intent of causing the person to become incapacitated and vulnerable to the prohibited conduct.



This written notification must:

1. Be written in plain language that is easy to understand;
2. Use print that is of the color, size and font that allow the notification to be easily read; and
3. Be made available to students, students' parents, staff members and members of the public at each school office, at the district office and on the school or district website.

**Step 2** The district official receiving the information or complaint shall promptly initiate an investigation and will notify the complainant when such investigation is initiated. The official will arrange such meetings as may be necessary to discuss the issue with all concerned parties within ten working days after receipt of the information or complaint. All findings of the investigation, including the response of the alleged harasser, shall be reduced to writing. The official conducting the investigation shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. The parties will have an opportunity to submit evidence and a list of witnesses.

A copy of the notification letter provided in step 1 and the date and details of notification to the complainant of the results of the investigation, together with any other documentation related to the sexual harassment incident, including disciplinary action taken or recommended, shall be forwarded to the superintendent.

**Step 3** If a complainant is not satisfied with the decision at step 2, the complainant may submit a written appeal to the superintendent or designee. Such appeal must be filed within 10 working days after receipt of the step 2 decision. The superintendent or designee will arrange such meetings with the complainant and other affected parties as deemed necessary to discuss the appeal. The superintendent or designee shall provide a written decision to the complainant within 20 working days.

**Step 4** If a complainant is not satisfied with the decision at step 3, the complainant may submit a written appeal to the Board. Such appeal must be filed within 5 working days after receipt of the step 3 decision. The Board shall, at a properly-noticed Board meeting, conduct a hearing at which time the complainant shall be given an opportunity to present the appeal. The Board may use executive session if the subject matter qualifies under Oregon law. The Board shall provide a written decision to the complainant within 10 working days following completion of the hearing.

Complaints against the principal may start at step 3 and may be filed with the superintendent. The superintendent will cause the notice requirements identified in step 1 to be completed and the notice to the complainant when the investigation is initiated. The superintendent will investigate the complaint and will notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. If the complaint remains unresolved within 10 working days of receipt by the superintendent, the complainant may appeal to the Board in step 4.

Complaints against the superintendent may start at step 4 and should be referred to the Board chair on behalf of the Board. The Board chair will cause the notice requirements identified in step 1 to be completed and the notice to the complainant when the investigation is initiated. The Board chair shall present the complaint to the Board. The Board may use executive session if the subject matter qualifies under Oregon law. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board chair shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. After receiving the results of the investigation, the Board shall decide, within [20] days, in open session what action, if any, is warranted.

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

Direct complaints related to educational programs and services may be made to the Regional Civil Rights Director, U.S. Department of Education, Office for Civil Rights, Region X, 915 2nd Ave., Room 3310, Seattle, WA 98174-1099.

Additional information regarding filing of a complaint may be obtained through the principal, compliance officer or superintendent.

All documentation related to sexual harassment complaints may become part of the student's education record or employee's personnel file, as appropriate. Additionally, a copy of all sexual harassment complaints and documentation will be maintained as a confidential file and stored in the district office.

The superintendent shall report the name of any person holding a teaching license or registered with Teacher Standards and Practices Commission (TSPC) or participating in a practicum under Oregon Administrative Rule (OAR) Chapter 584, Division 17, when, after appropriate investigation, there is reasonable cause to believe the person may have committed an act of sexual harassment. Reports shall be made to TSPC within 30 days of such a finding. Reports of sexual contact with a student shall be given to a representative from law enforcement or Oregon Department of Human Services, as possible child abuse.

[Name of District]  
[Address] | [Phone]

**SEXUAL HARASSMENT COMPLAINT FORM**

Name of complainant: \_\_\_\_\_

Position of complainant: \_\_\_\_\_

Date of complaint: \_\_\_\_\_

Name of alleged harasser: \_\_\_\_\_

Date and place of incident or incidents: \_\_\_\_\_

Description of misconduct: \_\_\_\_\_

Name of witnesses (if any): \_\_\_\_\_

Evidence of sexual harassment, i.e., letters, photos, etc. (attach evidence if possible): \_\_\_\_\_

Any other information: \_\_\_\_\_

I agree that all the information on this form is accurate and true to the best of my knowledge.

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

[Name of District]  
[Address] | [Phone]

**WITNESS DISCLOSURE FORM**

Name of Witness: \_\_\_\_\_

Position of Witness: \_\_\_\_\_

Date of Testimony/Interview: \_\_\_\_\_

Description of Instance Witnessed: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Any Other Information: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I agree that all the information on this form is accurate and true to the best of my knowledge.

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

# OSBA Model Sample Policy

Code: GBLA  
Adopted:

## Disclosure of Information

Authorized district officials may disclose information about a former employee's job performance to a prospective employer. District officials are immune from civil liability for such disclosures under the following conditions:

1. The disclosure of information regarding the former employee's job performance is upon request of the prospective employer or the former employee. This disclosure is presumed to be in good faith. Presumption of good faith is rebutted by showing the information disclosed was:
  - a. Knowingly false;
  - b. Deliberately misleading;
  - c. Rendered with malicious purpose; or
  - d. Violated civil right of the former employee protected under Oregon Revised Statute (ORS) 659 or ORS 659A.
2. Records created pursuant to ORS 339.388(8)(c) are confidential and are not public records as defined in ORS 192.311. The district may use the record as a basis for providing the information required to be disclosed about an employee under ORS 339.378(1);
3. The disclosure is a result of a request from law enforcement, Oregon Department of Human Services, Teacher Standards and Practices Commission, or the Oregon Department of Education in conducting an investigation related to suspected abuse or suspected sexual conduct to the extent allowable by state and federal law, including laws protecting a person from self-incrimination;
4. No later than 20 days after receiving a request under ORS 339.374(1)(b), the district, if it has or has had an employment relationship with the applicant shall disclose the information requested.

END OF POLICY

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### Legal Reference(s):

[ORS 30.178](#)  
[ORS 339.370 - 339.374](#)

[ORS 339.378](#)  
[ORS 339.388](#)

[ORS Chapter 659](#)  
[ORS Chapter 659A](#)

OR. ATTORNEY GENERAL'S PUBLIC RECORDS AND MEETINGS MANUAL.

# OSBA Model Sample Policy

Code: JBA/GBN  
Adopted:

## Sexual Harassment

The district is committed to the elimination of sexual harassment in district schools, activities and programs. Sexual harassment is strictly prohibited and shall not be tolerated. This includes sexual harassment: of students by staff members, other students or third parties; of staff members by students, other staff members or third parties; and of third parties by staff members and students. This policy applies to third parties who are on or immediately adjacent to school grounds or district property, are at any school-sponsored or district-sponsored activity or program, or are off school or district property, if a student or staff member acts toward the person in a manner that creates a hostile environment for the person while at school or a school-sponsored or district-sponsored activity or program. "Third parties" include, but are not limited to, school volunteers, parents, school visitors, service contractors or others engaged in district business, such as employees of businesses or organizations participating in cooperative work programs with the district and others not directly subject to district control at interdistrict and intradistrict athletic competitions or other school events. "District" includes: district facilities; district premises and nondistrict property if the student or staff member is at any district-sponsored, district-approved or district-related activity or function, such as field trips or athletic events, where students are under the jurisdiction of the district; or where the staff member is engaged in district business. The prohibition also includes off duty conduct which is incompatible with a staff member's district job responsibilities.

All staff members, students, and third parties are subject to this policy.

Sexual harassment of students, staff members or third parties shall include:

1. A demand or request for sexual favors in exchange for benefits;
2. Unwelcome conduct of a sexual nature that is physical, verbal or nonverbal and that interferes with a student's educational program or activity or that creates an intimidating, offensive or hostile educational environment; unwelcome conduct of a sexual nature that is physical, verbal or nonverbal and that interferes with the staff member's ability to perform the job or that creates an intimidating, offensive or hostile work environment; or unwelcome conduct of a sexual nature that is physical, verbal or nonverbal and that creates an intimidating, offensive or hostile environment; and
3. Assault when sexual contact occurs without the student's, staff member's or third party's consent because the student, staff member or third party is under the influence of drugs or alcohol, is unconscious or is pressured through physical force, coercion or explicit or implied threats.

Examples of sexual harassment may include, but not be limited to, <sup>[1]</sup>physical touching or graffiti of a sexual nature; displaying or distributing of sexually explicit drawings; pictures and written materials;

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[<sup>1</sup> OAR 581-021-0038 requires that the policy include a "list of examples of harassing behaviors covered by policy". The bracketed list in this policy reflects OSBA's recommendations. The district does have discretion in what is included in this list. If you are listing behaviors not reflected in our recommendations, please make sure that you have your list reviewed by your school district's legal counsel.]

sexual gestures or obscene jokes; touching oneself sexually or talking about one's sexuality in front of others; or spreading rumors about or rating other students or others as to appearance, sexual activity or performance].

All complaints or reports about behavior that may violate this policy shall be promptly investigated.

Any staff member who becomes aware of behavior that may violate this policy shall [immediately] report to a district official so that the district official (and the reporting staff member when the victim of the harassment is a student or third party) may coordinate efforts to take any action necessary to ensure the:

1. Student is protected and to promote a nonhostile learning environment;
2. Staff member is protected and to promote a nonhostile work environment; or
3. Third party who is subjected to the behavior is protected and to promote a nonhostile environment.

This includes providing resources for support measures to the student, staff member or third party who was subjected to the behavior and taking any actions that are necessary to remove potential future impact on the student, staff member or third party, but are not retaliatory against the student, staff member or third party being harassed or the staff member who reported to the district official.

Any student or staff member who feels they are a victim of sexual harassment are encouraged to [immediately] report their concerns to district officials, this includes officials such as the principal, compliance officer or superintendent. Students may also report concerns to a teacher, counselor or school nurse, who will promptly notify the appropriate district official.

Upon receipt of a complaint from a student or the student's parents, a staff member or a third party alleging behavior that may violate this policy, the district shall provide written notice as required by Oregon Revised Statute (ORS) 342.704(5) to the complainant.

The person who initiated the complaint and if applicable the student's parents or person's parents shall be notified when the investigation is initiated and concluded and as to whether a violation of this policy was found to have occurred to the extent allowable under state and federal student confidentiality laws.

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

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

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

The superintendent shall ensure appropriate periodic sexual harassment awareness training or information is provided to all supervisors, staff members and students and that annually, the name and position of district officials responsible for accepting and managing sexual harassment complaints, business phone numbers, addresses or other necessary contact information is readily available. This policy as well as the complaint procedure will be made available upon request to all students, parents of students, staff members and third parties, posted on the district's website and published in student/parent and staff handbooks. The district's policy shall be posted on a sign in all schools. Posted signs shall be at least 8-1/2 inches by 11 inches in size.

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

END OF POLICY

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**Legal Reference(s):**

[ORS 243.706](#)

[ORS 332.107](#)

[ORS 342.700](#)

[ORS 342.704](#)

[ORS 342.708](#)

[ORS 342.850](#)

[ORS 342.865](#)

[ORS 659.850](#)

[ORS 659A.006](#)

[ORS 659A.029](#)

[ORS 659A.030](#)

[OAR 581-021-0038](#)

[OAR 584-020-0040](#)

[OAR 584-020-0041](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2019).

Davis v. Monroe County Bd. of Educ., 526 U.S. 629 (1999).

Gebser v. Lago Vista Indep. Sch. Dist., 524 U.S. 274 (1998).



# OSBA Model Sample Policy

Code: GBN/JBA

Adopted:

## Sexual Harassment

The district is committed to the elimination of sexual harassment in district schools, activities and programs. Sexual harassment is strictly prohibited and shall not be tolerated. This includes sexual harassment: of students by staff members, other students or third parties; of staff members by students, other staff members or third parties; and of third parties by staff members and students. This policy applies to third parties who are on or immediately adjacent to school grounds or district property, are at any school-sponsored or district-sponsored activity or program, or are off school or district property, if a student or staff member acts toward the person in a manner that creates a hostile environment for the person while at school or a school-sponsored or district-sponsored activity or program. "Third parties" include, but are not limited to, school volunteers, parents, school visitors, service contractors or others engaged in district business, such as employees of businesses or organizations participating in cooperative work programs with the district and others not directly subject to district control at interdistrict and intradistrict athletic competitions or other school events. "District" includes: district facilities; district premises and nondistrict property if the student or staff member is at any district-sponsored, district-approved or district-related activity or function, such as field trips or athletic events, where students are under the jurisdiction of the district; or where the staff member is engaged in district business. The prohibition also includes off duty conduct which is incompatible with a staff member's district job responsibilities.

All staff members, students, and third parties are subject to this policy.

Sexual harassment of students, staff members or third parties shall include:

1. A demand or request for sexual favors in exchange for benefits;
2. Unwelcome conduct of a sexual nature that is physical, verbal or nonverbal and that interferes with a student's educational program or activity or that creates an intimidating, offensive or hostile educational environment; unwelcome conduct of a sexual nature that is physical, verbal or nonverbal and that interferes with the staff member's ability to perform the job or that creates an intimidating, offensive or hostile work environment; or unwelcome conduct of a sexual nature that is physical, verbal or nonverbal and that creates an intimidating, offensive or hostile environment; and
3. Assault when sexual contact occurs without the student's, staff member's or third party's consent because the student, staff member or third party is under the influence of drugs or alcohol, is unconscious or is pressured through physical force, coercion or explicit or implied threats.

Examples of sexual harassment may include, but not be limited to, <sup>[1]</sup>physical touching or graffiti of a sexual nature; displaying or distributing of sexually explicit drawings; pictures and written materials;

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[<sup>1</sup> OAR 581-021-0038 requires that the policy include a "list of examples of harassing behaviors covered by policy". The bracketed list in this policy reflects OSBA's recommendations. The district does have discretion in what is included in this list. If you are listing behaviors not reflected in our recommendations, please make sure that you have your list reviewed by your school district's legal counsel.]

sexual gestures or obscene jokes; touching oneself sexually or talking about one's sexuality in front of others; or spreading rumors about or rating other students or others as to appearance, sexual activity or performance].

All complaints or reports about behavior that may violate this policy shall be promptly investigated.

Any staff member who becomes aware of behavior that may violate this policy shall [immediately] report to a district official so that the district official (and the reporting staff member when the victim of the harassment is a student or third party) may coordinate efforts to take any action necessary to ensure the:

1. Student is protected and to promote a nonhostile learning environment;
2. Staff member is protected and to promote a nonhostile work environment; or
3. Third party who is subjected to the behavior is protected and to promote a nonhostile environment.

This includes providing resources for support measures to the student, staff member or third party who was subjected to the behavior and taking any actions that are necessary to remove potential future impact on the student, staff member or third party, but are not retaliatory against the student, staff member or third party being harassed or the staff member who reported to the district official.

Any student or staff member who feels they are a victim of sexual harassment are encouraged to [immediately] report their concerns to district officials, this includes officials such as the principal, compliance officer or superintendent. Students may also report concerns to a teacher, counselor or school nurse, who will promptly notify the appropriate district official.

Upon receipt of a complaint from a student or the student's parents, a staff member or a third party alleging behavior that may violate this policy, the district shall provide written notice as required by Oregon Revised Statute (ORS) 342.704(5) to the complainant.

The person who initiated the complaint and if applicable the student's parents or person's parents shall be notified when the investigation is initiated and concluded and as to whether a violation of this policy was found to have occurred to the extent allowable under state and federal student confidentiality laws.

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

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

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

The superintendent shall ensure appropriate periodic sexual harassment awareness training or information is provided to all supervisors, staff members and students and that annually, the name and position of district officials responsible for accepting and managing sexual harassment complaints, business phone numbers, addresses or other necessary contact information is readily available. This policy as well as the complaint procedure will be made available upon request to all students, parents of students, staff members and third parties, posted on the district's website and published in student/parent and staff handbooks. The district's policy shall be posted on a sign in all schools. Posted signs shall be at least 8-1/2 inches by 11 inches in size.

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

END OF POLICY

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**Legal Reference(s):**

[ORS 243.706](#)  
[ORS 332.107](#)  
[ORS 342.700](#)  
[ORS 342.704](#)  
[ORS 342.708](#)

[ORS 342.850](#)  
[ORS 342.865](#)  
[ORS 659.850](#)  
[ORS 659A.006](#)  
[ORS 659A.029](#)

[ORS 659A.030](#)  
[OAR 581-021-0038](#)  
[OAR 584-020-0040](#)  
[OAR 584-020-0041](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2019).

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

# OSBA Model Sample Policy

Code: GBL

Adopted:

## Personnel Records \*

An official personnel file will be established for each person employed by the district. Personnel files will be maintained in a central location.

All records containing employee medical condition information such as workers' compensation reports and release or permission to return to work forms will be kept confidential, in a separate file from personnel records. Such records will be released only in accordance with the requirements of the Americans with Disabilities Act or other applicable law.

The superintendent will be responsible for establishing procedures regarding the control, use, safety and maintenance of all personnel records. Employees will be given a copy of evaluations, complaints and written disciplinary actions placed in their personnel file. All charges resulting in disciplinary action shall be considered a permanent part of a teacher's personnel file and shall not be removed for any reason. Employees may submit a written response to any materials placed in their personnel file.

Except as provided below, or required by law, district employees' personnel records will be available for use and inspection only by the following:

1. The individual employee. An employee may arrange with the personnel office to inspect the contents of their personnel file on any day the personnel office is open for business;
2. Others designated by the employee in writing may arrange to inspect the contents of the employee's personnel file in the same manner described above;
3. The comptroller or auditor, when such inspection is pertinent to carrying out their respective duties, or as otherwise specifically authorized by the Board. Information so obtained will be kept confidential. No files will be removed from their central location for personal inspection;
4. A Board member when specifically authorized by the Board. Information will be kept confidential. No files will be removed from their central location for personal inspection;
5. The superintendent and members of the central administrative staff designated by the superintendent;
6. District administrators and supervisors who currently or prospectively supervise the employee;
7. Employees of the personnel office;
8. Attorneys for the district or the district's designated representative on matters of district business;
9. Records created pursuant to ORS 339.388(8)(c) are confidential and are not public records as defined in ORS 192.311. The district may use the record as a basis for providing the information required to be disclosed about an employee under ORS 339.378(1);

10. Upon request from a law enforcement agency, the Oregon Department of Human Services, the Teacher Standards and Practices Commission, or the Oregon Department of Education, in conducting an investigation related to suspected abuse or suspected sexual conduct, to the extent allowable by state and federal law, including laws protecting a person from self-incrimination.

The superintendent may permit persons other than those specified above to use and to inspect personnel records when, in their opinion, the person requesting access has a legitimate official purpose. The superintendent will determine in each case, the appropriateness and extent of such access.

No personnel files shall be removed from their central location for personal inspection. Release of personnel records to parties other than those authorized to inspect them will be only upon receipt of a subpoena or court order.

END OF POLICY

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**Legal Reference(s):**

[ORS 339.370 – 339.374](#)  
[ORS 339.388](#)

[ORS 342.143](#)  
[ORS 342.850](#)

[ORS 652.750](#)  
[OAR 581-022-2405](#)

OSEA v. Lake County Sch. District, 93 Or. App. 481 (1988).

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12112 (2018); 29 C.F.R. Part 1630 (2019); 28 C.F.R. Part 35 (2019).

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. § 2000ff-1 (2018).

# OSBA Model Sample

Code: GBN/JBA-AR

Revised/Reviewed:

## Sexual Harassment Complaint Procedure

Principals, the compliance officer and the superintendent have responsibility for reports, complaints and investigations concerning sexual harassment. The investigator(s) shall be a neutral party having had no involvement in the complaint presented.

Step 1 Any sexual harassment information (i.e., reports, complaints, rumors, etc.) shall be presented to district officials, this includes officials such as the principal, compliance officer or superintendent. All such information shall be reduced to writing and will include the specific nature of the sexual harassment and corresponding dates.

The district official receiving the complaint shall cause the district to provide written notice from the district to the complainant that includes:

1. The rights of the student, student's parents, staff member, person or person's parents who filed the complaint;
2. Information about the internal complaint processes available through the school or district that the student, student's parents, staff member, person or person's parents may pursue, including the person designated for the school or district for receiving complaints;
3. Notice that civil and criminal remedies that are not provided by the school or district may be available to the complainant through the legal system and that those remedies may be subject to statutes of limitation;
4. Information about services available to the student or staff member complainant through the school or district including any counseling services, nursing services or peer advising;
5. Information about the privacy rights of the student, student's parents, staff member, person or person's parents and legally recognized exceptions to those rights for internal complaint processes and services available through the school or district;
6. Information about, and contact information for, state and community-based services and resources that are available to persons who have experienced sexual harassment; and
7. Notice that students who report information about possible prohibited conduct and students who participate in an investigation under this policy may not be disciplined for violations of the district's drug and alcohol policies that occurred in connection with the reported prohibited conduct and that were discovered as a result of a prohibited conduct report or investigation unless the student gave another person alcohol or drugs without the person's knowledge and with the intent of causing the person to become incapacitated and vulnerable to the prohibited conduct.

This written notification must:

1. Be written in plain language that is easy to understand;
2. Use print that is of the color, size and font that allow the notification to be easily read; and
3. Be made available to students, students' parents, staff members and members of the public at each school office, at the district office and on the school or district website.

**Step 2** The district official receiving the information or complaint shall promptly initiate an investigation and will notify the complainant when such investigation is initiated. The official will arrange such meetings as may be necessary to discuss the issue with all concerned parties within ten working days after receipt of the information or complaint. All findings of the investigation, including the response of the alleged harasser, shall be reduced to writing. The official conducting the investigation shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. The parties will have an opportunity to submit evidence and a list of witnesses.

A copy of the notification letter provided in step 1 and the date and details of notification to the complainant of the results of the investigation, together with any other documentation related to the sexual harassment incident, including disciplinary action taken or recommended, shall be forwarded to the superintendent.

**Step 3** If a complainant is not satisfied with the decision at step 2, the complainant may submit a written appeal to the superintendent or designee. Such appeal must be filed within 10 working days after receipt of the step 2 decision. The superintendent or designee will arrange such meetings with the complainant and other affected parties as deemed necessary to discuss the appeal. The superintendent or designee shall provide a written decision to the complainant within 20 working days.

**Step 4** If a complainant is not satisfied with the decision at step 3, the complainant may submit a written appeal to the Board. Such appeal must be filed within 5 working days after receipt of the step 3 decision. The Board shall, at a properly-noticed Board meeting, conduct a hearing at which time the complainant shall be given an opportunity to present the appeal. The Board may use executive session if the subject matter qualifies under Oregon law. The Board shall provide a written decision to the complainant within 10 working days following completion of the hearing.

Complaints against the principal may start at step 3 and may be filed with the superintendent. The superintendent will cause the notice requirements identified in step 1 to be completed and the notice to the complainant when the investigation is initiated. The superintendent will investigate the complaint and will notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. If the complaint remains unresolved within 10 working days of receipt by the superintendent, the complainant may appeal to the Board in step 4.

Complaints against the superintendent may start at step 4 and should be referred to the Board chair on behalf of the Board. The Board chair will cause the notice requirements identified in step 1 to be completed and the notice to the complainant when the investigation is initiated. The Board chair shall present the complaint to the Board. The Board may use executive session if the subject matter qualifies under Oregon law. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board chair shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. After receiving the results of the investigation, the Board shall decide, within [20] days, in open session what action, if any, is warranted.

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

Direct complaints related to educational programs and services may be made to the Regional Civil Rights Director, U.S. Department of Education, Office for Civil Rights, Region X, 915 2nd Ave., Room 3310, Seattle, WA 98174-1099.

Additional information regarding filing of a complaint may be obtained through the principal, compliance officer or superintendent.

All documentation related to sexual harassment complaints may become part of the student's education record or employee's personnel file, as appropriate. Additionally, a copy of all sexual harassment complaints and documentation will be maintained as a confidential file and stored in the district office.

The superintendent shall report the name of any person holding a teaching license or registered with Teacher Standards and Practices Commission (TSPC) or participating in a practicum under Oregon Administrative Rule (OAR) Chapter 584, Division 17, when, after appropriate investigation, there is reasonable cause to believe the person may have committed an act of sexual harassment. Reports shall be made to TSPC within 30 days of such a finding. Reports of sexual contact with a student shall be given to a representative from law enforcement or Oregon Department of Human Services, as possible child abuse.



[Name of District]  
[Address] | [Phone]

**SEXUAL HARASSMENT COMPLAINT FORM**

Name of complainant: \_\_\_\_\_

Position of complainant: \_\_\_\_\_

Date of complaint: \_\_\_\_\_

Name of alleged harasser: \_\_\_\_\_

Date and place of incident or incidents: \_\_\_\_\_

Description of misconduct: \_\_\_\_\_

Name of witnesses (if any): \_\_\_\_\_

Evidence of sexual harassment, i.e., letters, photos, etc. (attach evidence if possible): \_\_\_\_\_

Any other information: \_\_\_\_\_

I agree that all the information on this form is accurate and true to the best of my knowledge.

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

[Name of District]  
[Address] | [Phone]

**WITNESS DISCLOSURE FORM**

Name of Witness: \_\_\_\_\_

Position of Witness: \_\_\_\_\_

Date of Testimony/Interview: \_\_\_\_\_

Description of Instance Witnessed: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Any Other Information: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I agree that all the information on this form is accurate and true to the best of my knowledge.

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

# OSBA Model Sample Policy

Code:

JBA/GBN

Adopted:

## Sexual Harassment

*(This version of Sexual Harassment model policy is recommended for deletion; see new version in this May 2020 Policy Update issue.)*

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

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

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

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

All complaints about behavior that may violate this policy shall be promptly investigated. Any students, staff members or third parties who has knowledge of conduct in violation of this policy or feels they are a victim of sexual harassment must immediately report their concerns to the principal, compliance officer or superintendent, who has overall responsibility for all investigations. Students may also report concerns to a teacher, counselor or school nurse, who will promptly notify the appropriate district official.

Upon receipt of a complaint by a student, student's parents, staff member or a third party alleging behavior that may violate this policy, the district shall provide written notice as required by Oregon Revised Statute (ORS) 342.704(4) to the complainant.

The student and/or the student's parents, the staff member or the third party who initiated the complaint shall be notified that the investigation has been concluded and as to whether a violation of this policy was found to have occurred to the extent allowable under state and federal confidentiality laws.

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

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

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

The superintendent shall ensure appropriate periodic sexual harassment awareness training or information is provided to all supervisors, staff members and students and that annually, the name and position of district officials responsible for accepting and managing sexual harassment complaints, business phone numbers, addresses or other necessary contact information is readily available. This policy as well as the complaint procedure will be made available upon request to all students, parents of students, staff members and third parties, posted on the district's website and published in student/parent and staff handbooks. The district's policy shall be posted on a sign in [<sup>1</sup>all grade 6 through 12 schools] [all schools]. Posted signs shall be at least 8-1/2 inches by 11 inches in size.

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<sup>1</sup> [Posting in "all grade 6 through 12 schools" is the minimum requirement per ORS 342.700.]

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

END OF POLICY

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**Legal Reference(s):**

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

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

[OAR 581-021-0038](#)  
[OAR 584-020-0040](#)  
[OAR 584-020-0041](#)  
HB 4150 (2018)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2012).  
Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2012).  
Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2012); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2017).  
Davis v. Monroe County Bd. of Educ., 526 U.S. 629 (1999).  
Gebser v. Lago Vista Indep. Sch. Dist., 524 U.S. 274 (1998).

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# OSBA Model Sample Policy

Code: GBN/JBA-AR  
Revised/Reviewed:

## Sexual Harassment Complaint Procedure

*(This version of Sexual Harassment model administrative regulation is recommended for deletion; see new version in this May 2020 Policy Update issue.)*

Principals, the compliance officer and the superintendent have responsibility for complaints and investigations concerning sexual harassment. The investigator(s) shall be a neutral party having had no involvement in the complaint presented.

Step 1 Any sexual harassment information (i.e., complaints, rumors, etc.) shall be presented to the principal, compliance officer or superintendent. All such information shall be reduced to writing and will include the specific nature of the sexual harassment and corresponding dates.

The district official receiving the complaint shall cause the district to provide written notice from the district to the complainant that includes:

1. Their rights;
2. Information about the internal complaint processes available through the school or district that the complainant may pursue;
3. Notice that civil and criminal remedies that are not provided by the school or district may be available to the complainant through the legal system and that those remedies may be subject to statutes of limitation;
4. Information about services available to the student or staff member complainant through the school or district including any counseling services, nursing services or peer advising;
5. Information about the privacy rights of the complainants and legally recognized exceptions to those rights for internal complaint processes and services available through the school or district; and
6. Information about, and contact information for, state and community-based services and resources that are available to persons who have experienced sexual harassment.

This written notification must:

1. Be written in plain language that is easy to understand;
2. Use print that is of the color, size and font that allow the notification to be easily read; and
3. Include that this information is made available to students, students' parents, staff members and members of the public on the school or district website.

Step 2 The district official receiving the information or complaint shall promptly initiate an investigation. The official will arrange such meetings as may be necessary to discuss the issue with all concerned parties within [five] working days after receipt of the information or complaint. All findings of the investigation, including the response of the alleged harasser, shall be reduced to writing. The official conducting the investigation shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. The parties will have an opportunity to submit evidence and a list of witnesses.

A copy of the notification letter provided in step 1 and the date and details of notification to the complainant of the results of the investigation, together with any other documentation related to the sexual harassment incident, including disciplinary action taken or recommended, shall be forwarded to the superintendent.

Step 3 If a complainant is not satisfied with the decision at step 2, the complainant may submit a written appeal to the superintendent or designee. Such appeal must be filed within [10] working days after receipt of the step 2 decision. The superintendent or designee will arrange such meetings with the complainant and other affected parties as deemed necessary to discuss the appeal. The superintendent or designee shall provide a written decision to the complainant within [10] working days.

Step 4 If a complainant is not satisfied with the decision at step 3, the complainant may submit a written appeal to the Board. Such appeal must be filed within [10] working days after receipt of the step 3 decision. The Board shall, within [20] working days, conduct a hearing at which time the complainant shall be given an opportunity to present the appeal. The Board shall provide a written decision to the complainant within [10] working days following completion of the hearing.

Complaints against the principal may start at step 3 and may be filed with the superintendent. The superintendent will cause the notice requirements identified in step 1 to be completed. The superintendent will investigate the complaint and will notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. If the complaint remains unresolved within [10] working days of receipt by the superintendent, the complainant may appeal to the Board in step 4.

Complaints against the superintendent may start at step 4 and should be referred to the Board chair on behalf of the Board. The Board chair will cause the notice requirements identified in step 1 to be completed. The Board chair shall present the complaint to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board chair shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. After receiving the results of the investigation, the Board shall decide, within [20] days, in open session what action, if any, is warranted.

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

Direct complaints related to educational programs and services may be made to the Regional Civil Rights Director, U.S. Department of Education, Office for Civil Rights, Region X, 915 2nd Ave., Room 3310, Seattle, WA 98174-1099.

Additional information regarding filing of a complaint may be obtained through the principal, compliance officer or superintendent.

All documentation related to sexual harassment complaints may become part of the student's education record or employee's personnel file, as appropriate. Additionally, a copy of all sexual harassment complaints and documentation will be maintained as a confidential file and stored in the district office.

The superintendent shall report the name of any person holding a teaching license or registered with Teacher Standards and Practices Commission (TSPC) or participating in a practicum under Oregon Administrative Rule (OAR) Chapter 584, Division 17, when, after appropriate investigation, there is reasonable cause to believe the person may have committed an act of sexual harassment. Reports shall be made to TSPC within 30 days of such a finding. Reports of sexual contact with a student shall be given to a representative from law enforcement or Oregon Department of Human Services, as possible child abuse.

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[Name of District]  
[Address] | [Phone]

**SEXUAL HARASSMENT COMPLAINT FORM**

**D**

Name of complainant: \_\_\_\_\_

Position of complainant: \_\_\_\_\_

Date of complaint: \_\_\_\_\_

Name of alleged harasser: \_\_\_\_\_

Date and place of incident or incidents: \_\_\_\_\_

Description of misconduct: \_\_\_\_\_

Name of witnesses (if any): \_\_\_\_\_

Evidence of sexual harassment, i.e., letters, photos, etc. (attach evidence if possible): \_\_\_\_\_

Any other information: \_\_\_\_\_

I agree that all of the information on this form is accurate and true to the best of my knowledge.

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

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

[Name of District]  
[Address] | [Phone]

**WITNESS DISCLOSURE FORM**

**D**

Name of Witness: \_\_\_\_\_

Position of Witness: \_\_\_\_\_

Date of Testimony/Interview: \_\_\_\_\_

Description of Instance Witnessed: \_\_\_\_\_

**E**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**L**

Any Other Information: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**E**

I agree that all the information on this form is accurate and true to the best of my knowledge.

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

**T**

**E**

# OSBA Model Sample Policy

Code: GBN/JBA  
Adopted:

## Sexual Harassment

*(This version of Sexual Harassment model policy is recommended for deletion; see new version in this May 2020 Policy Update issue.)*

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

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

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

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

All complaints about behavior that may violate this policy shall be promptly investigated. Any students, staff members or third parties who has knowledge of conduct in violation of this policy or feels they are a victim of sexual harassment must immediately report their concerns to the principal, compliance officer or superintendent, who has overall responsibility for all investigations. Students may also report concerns to a teacher, counselor or school nurse, who will promptly notify the appropriate district official.

Upon receipt of a complaint by a student, student's parents, a staff member or a third party alleging behavior that may violate this policy, the district shall provide written notice as required by Oregon Revised Statute (ORS) 342.704(4) to the complainant.

The student and/or the student's parents, the staff member or the third party who initiated the complaint shall be notified that the investigation has been concluded and as to whether a violation of this policy was found to have occurred to the extent allowable under state and federal confidentiality laws.

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

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

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

The superintendent shall ensure appropriate periodic sexual harassment awareness training or information is provided to all supervisors, staff members and students and that annually, the name and position of district officials responsible for accepting and managing sexual harassment complaints, business phone numbers, addresses or other necessary contact information is readily available. This policy as well as the complaint procedure will be made available upon request to all students, parents of students, staff members and third parties, posted on the district's website and published in student/parent and staff handbooks. The district's policy shall be posted on a sign in <sup>1</sup>[all grade 6 through 12 schools] [all schools]. Posted signs shall be at least 8-1/2 inches by 11 inches in size.

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<sup>1</sup> [Posting in "in grade 6 through 12 schools" is the minimum requirement per ORS 342.700.]

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

END OF POLICY

**Legal Reference(s):**

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

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

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

HB 4150 (2018)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2012).

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

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2012); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2017).

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

DELETED

# OSBA Model Sample Policy

Code: JBA/GBN-AR

Revised/Reviewed:

## Sexual Harassment Complaint Procedure

*(This version of Sexual Harassment model administrative regulation is recommended for deletion; see new version in this May 2020 Policy Update issue.)*

Principals, the compliance officer and the superintendent have responsibility for complaints and investigations concerning sexual harassment. The investigator(s) shall be a neutral party having had no involvement in the complaint presented.

Step 1 Any sexual harassment information (i.e., complaints, rumors, etc.) shall be presented to the principal, compliance officer or superintendent. All such information shall be reduced to writing and will include the specific nature of the sexual harassment and corresponding dates.

The district official receiving the complaint shall cause the district to provide written notice from the district to the complainant that includes:

1. Their rights;
2. Information about the internal complaint processes available through the school or district that the complainant may pursue;
3. Notice that civil and criminal remedies that are not provided by the school or district may be available to the complainant through the legal system and that those remedies may be subject to statutes of limitation;
4. Information about services available to the student or staff member complainant through the school or district including any counseling services, nursing services or peer advising;
5. Information about the privacy rights of the complainant and legally recognized exceptions to those rights for internal complaint processes and services available through the school or district; and
6. Information about, and contact information for, state and community-based services and resources that are available to persons who have experienced sexual harassment.

This written notification must:

1. Be written in plain language that is easy to understand;
2. Use print that is of the color, size and font that allow the notification to be easily read; and
3. Include that this information is made available to students, students' parents, staff members and members of the public on the school or district website.

Step 2 The district official receiving the information or complaint shall promptly initiate an investigation. The official will arrange such meetings as may be necessary to discuss the issue with all concerned parties within [five] working days after receipt of the information or complaint. All findings of the investigation, including the response of the alleged harasser, shall be reduced to writing. The official conducting the investigation shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. The parties will have an opportunity to submit evidence and a list of witnesses.

A copy of the notification letter provided in step 1 and the date and details of notification to the complainant of the results of the investigation, together with any other documentation related to the sexual harassment incident, including disciplinary action taken or recommended, shall be forwarded to the superintendent.

Step 3 If a complainant is not satisfied with the decision at step 2, the complainant may submit a written appeal to the superintendent or designee. Such appeal must be filed within [10] working days after receipt of the step 2 decision. The superintendent or designee will arrange such meetings with the complainant and other affected parties as deemed necessary to discuss the appeal. The superintendent or designee shall provide a written decision to the complainant within [10] working days.

Step 4 If a complainant is not satisfied with the decision at step 3, the complainant may submit a written appeal to the Board. Such appeal must be filed within [10] working days after receipt of the step 3 decision. The Board shall, within [20] working days, conduct a hearing at which time the complainant shall be given an opportunity to present the appeal. The Board shall provide a written decision to the complainant within [10] working days following completion of the hearing.

Complaints against the principal may start at step 3 and may be filed with the superintendent. The superintendent will cause the notice requirements identified in step 1 to be completed. The superintendent will investigate the complaint and will notify the complainant in writing when the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. If the complaint remains unresolved within [10] working days of receipt by the superintendent, the complainant may appeal to the Board in step 4.

Complaints against the superintendent may start at step 4 and should be referred to the Board chair on behalf of the Board. The Board chair will cause the notice requirements identified in step 1 to be completed. The Board chair shall present the complaint to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board chair shall notify the complainant in writing that the investigation is concluded and if a violation of the policy was found to have occurred to the extent allowable by law. After receiving the results of the investigation, the Board shall decide, within [20] days, in open session what action, if any, is warranted.

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

Direct complaints related to educational programs and services may be made to the Regional Civil Rights Director, U.S. Department of Education, Office for Civil Rights, Region X, 915 Second Ave., Room 3310, Seattle, WA 98174-1099.

Additional information regarding filing of a complaint may be obtained through the principal, the compliance officer or the superintendent.

All documentation related to sexual harassment complaints may become part of the student's education record or employee's personnel file, as appropriate. Additionally, a copy of all sexual harassment complaints and documentation will be maintained as a confidential file and stored in the district office.

The superintendent shall report the name of any person holding a teaching license or registered with Teacher Standards and Practices Commission (TSPC) or participating in a practicum under Oregon Administrative Rule (OAR) Chapter 584, Division 17, when, after appropriate investigation, there is reasonable cause to believe the person may have committed an act of sexual harassment. Reports shall be made to TSPC within 30 days of such a finding. Reports of sexual contact with a student shall be given to a representative from law enforcement or Oregon Department of Human Services, as possible child abuse.

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[Name of District]  
[Address] | [Phone]

**SEXUAL HARASSMENT COMPLAINT FORM**

**D**  
Name of complainant: \_\_\_\_\_

Position of complainant: \_\_\_\_\_

Date of complaint: \_\_\_\_\_

**E**  
Name of alleged harasser: \_\_\_\_\_

Date and place of incident or incidents: \_\_\_\_\_

Description of misconduct: \_\_\_\_\_

**L**  
Name of witnesses (if any): \_\_\_\_\_

**E**  
Evidence of sexual harassment, i.e., letters, photos, etc. (attach evidence if possible): \_\_\_\_\_

**T**  
Any other information: \_\_\_\_\_

I agree that all of the information on this form is accurate and true to the best of my knowledge.

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

Date: **E** \_\_\_\_\_

[Name of District]  
[Address] | [Phone]

**WITNESS DISCLOSURE FORM**

**D**  
Name of witness: \_\_\_\_\_

Position of witness: \_\_\_\_\_

Date of testimony/interview: \_\_\_\_\_

**E**  
Description of instance witnessed: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**L**  
Any Other Information: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**E**  
\_\_\_\_\_

I agree that all the information on this form is accurate and true to the best of my knowledge.

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

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

**T**

**E**

# OSBA Model Sample Policy

Code: IGBAH-AR

Adopted:

## Special Education - Evaluation and Eligibility Procedures\*\*

1. Request for Initial Evaluation
  - a. Consistent with its child find and parent consent obligations, the district responds promptly to requests initiated by a parent or public agency for an initial evaluation to determine if a child is a child with a disability.
  - b. Upon receiving a request from a parent or public agency for an initial evaluation, the district designates a team to determine whether an initial evaluation will be conducted.
    - (1) The district team includes the parent and at least two professionals, at least one of whom is a specialist knowledgeable and experienced in the evaluation and education of children with disabilities.
      - (a) The team may make the decision to evaluate with or without a meeting.
      - (b) The district documents team members' input, including parents, whether or not the district convenes a meeting.
  - c. If a meeting is held, the district invites parents to participate.
  - d. If the district agency refuses an evaluation requested by the parent, the district provides the parent with prior written notice of its refusal to conduct an evaluation.
  - e. The district acknowledges the parent's rights to challenge its refusal to conduct an evaluation.
2. The initial evaluation consists of procedures:
  - a. To determine if the child has a disability; and
  - b. To identify the child's educational needs.
3. The district conducts the initial evaluation within 60 school days of receiving parental consent for evaluation unless:
  - a. The district and the parents agree in writing to extend the timeline for an evaluation to determine eligibility for specific learning disabilities;
  - b. The child moves from another district during the evaluation, the district is making sufficient progress to ensure a prompt completion of the evaluation, and the parent and the district agree in writing to a specific time when the evaluation will be completed; or
  - c. The parent repeatedly fails or refuses to produce the child for evaluation.
4. Re-evaluation
  - a. The district conducts re-evaluations:
    - (1) When the educational or related services needs, including improved academic achievement and functional performance of the child, warrant an evaluation;
    - (2) When the child's parents or teacher request a re-evaluation; and
    - (3) At least every three years, unless that parent and the district agree that a re-evaluation is unnecessary.
  - b. The district does not conduct re-evaluation more than once a year unless the parent and district agree otherwise.

## 5. Evaluation Planning

- a. As part of an initial evaluation (if appropriate) and as part of any re-evaluation, the child's individualized education program (IEP) or individualized family service plan (IFSP) team, including the parents and other qualified professionals as appropriate, must review existing information on the child, including:
  - (1) Evaluations and information provided by the child's parents;
  - (2) Current classroom-based, local or state assessments and classroom-based observations;
  - (3) Observations by teachers and related service providers; and
  - (4) Medical, sensory, and health information.
- b. On the basis of that review and input from the child's parents, identify what additional data if any is needed to determine:
  - (1) Whether the child has a disability;
  - (2) The child's present levels of academic achievement and related development needs;
  - (3) Whether the child needs, or continues to need, early intervention/early childhood special education (EI/ECSE) or special education and related services; and
  - (4) For re-evaluation, whether the child needs any additions or modifications to the special education and related services or, for a preschool child, any additions or modification to ECSE services:
    - (a) To enable the child to meet the measurable annual goals in the child's IEP or IFSP; and
    - (b) To participate, as appropriate, in the general education curriculum or, for preschool children, appropriate activities.

## 6. Evaluation Procedures

- a. The district assesses the child in all areas related to the suspected disability, including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status and motor abilities.
- b. The evaluation is sufficiently comprehensive to identify all of the child's special education and related needs, whether or not commonly linked to the disability category in which the child has been classified.
- c. The evaluation includes information provided by the parent and a variety of assessment tools and strategies to gather relevant functional, developmental and academic information about the child that assist in determining:
  - (1) Whether the child has a disability; and
  - (2) The content of the child's IEP, including information related to enabling the child to be involved in and progress in the general education curriculum (or for a preschool child, to participate in appropriate activities).
- d. The district ensures that assessments and other evaluation materials, including those tailored to assess specific areas of educational need, used to assess a child:
  - (1) Are selected and administered so as not to be discriminatory on a racial or cultural basis;
  - (2) Are provided and administered in the child's native language or other mode of communication and in the form most likely to yield accurate information on what the child knows and can do academically, developmentally and functionally, unless it is clearly not feasible to do so;
  - (3) Are used for the purposes for which the assessments or measures are valid and reliable;
  - (4) Are administered by trained and knowledgeable personnel; and

- (5) Are administered in accordance with any instructions provided by the producer of the assessments.
- e. The district selects and administers assessments to ensure that if an assessment is administered to a child with impaired sensory, manual or speaking skills, the assessment results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure, rather than reflecting the child's impaired sensory, manual or speaking skills (unless those skills are the factors that the test purports to measure).
- f. The district uses technically sound instruments that may assess the relative contribution of cognitive factors and behavioral factors in addition to physical or developmental factors.
- g. The district does not use any single measure of assessment as the sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child.

7. Requirements if Additional Evaluation Data is not Needed to Determine Eligibility

- a. If the child's IEP or IFSP team determines that no additional data is needed to determine whether or not the child is or continues to be a child with a disability, and to determine the child's educational and developmental needs, the district provides prior written notice of that decision, the reasons for it, and the right of parents to request an assessment.
- b. When the IEP or IFSP team determines that no additional data is needed to determine eligibility, the district does not conduct an assessment of the child unless requested to do so by the parents.

8. Evaluation Procedures for Transfer Students

When a child with disabilities transfers from one district to another district in the same school year, the district coordinates with the previous district to complete any pending assessment as quickly as possible.

9. Eligibility Determination

- a. Once evaluation is completed, the district designates an eligibility team to determine whether the child is eligible for special education services.
- b. This team includes:
  - (1) Two or more professionals, one of whom will be knowledgeable and experienced in evaluating and teaching students with the suspected disability; and
  - (2) The student's parent(s).
- c. For consideration of eligibility in the area of specific learning disabilities, the district eligibility team includes:
  - (1) A group of qualified professionals and the parent;
  - (2) The child's regular classroom teacher or, if the child does not have a regular classroom teacher, a regular classroom teacher qualified to teach a child of his or her age, or for a child of less than school age, a preschool teacher; and
  - (3) A person qualified to conduct individual diagnostic examinations of children, such as a school psychologist, speech-language pathologist or other qualified professional.
- d. In interpreting evaluation data, each district team carefully considers and documents information from a variety of sources, including but not limited to, aptitude and achievement tests, teacher recommendations, physical condition, social or cultural background and adaptive behavior and all required elements of the evaluation.
- e. Each eligibility team prepares a written eligibility statement that includes:

- (1) Identification of the evaluation data considered in determining the child’s eligibility, including the required evaluation components for the disability under consideration;
  - (2) A determination of whether the child meets the minimum evaluation criteria for one or more of the disability categories in Oregon Administrative Rule;
  - (3) A determination of whether the primary basis for the suspected disability is:
    - (a) A lack of appropriate instruction in reading (including the essential components of reading) or math; or
    - (b) Limited English proficiency.
  - (4) A determination of whether the child’s disability has an adverse impact on the child’s educational performance;
  - (5) A determination of whether, as a result of the disability, the child needs special education services;
  - (6) The signature of every team member and an indication of whether each agrees with the eligibility determination;
  - (7) For a child suspected of having a specific learning disability, the team’s written report includes additional specific documentation as required by Oregon Administrative Rule.
- f. The team does not find a child eligible as a child with a disability if the determinant factor for that eligibility decision is:
- (1) Lack of appropriate instruction in reading, including the essential components of reading instruction or lack of appropriate instruction in math; or
  - (2) Limited English proficiency; and
  - (3) The child does not otherwise meet the eligibility criteria found in Oregon Administrative Rule for the category(ies) of disability under consideration.
- g. The team finds a child eligible if the child has a disability and needs special education and related services, even though the child is advancing from grade to grade.
- h. A child may have disabilities in more than one disability category, but the team needs to find the child eligible in only one category. However, the district evaluates the child in all areas related to the suspected disability or disabilities, and the child’s IEP addresses all of the child’s special education needs.

*Agenda Item No. 10*

*Financial Reports*

# BOARD MEMORANDUM



**To:** The Honorable Chair and Members  
Lebanon Community School District Board of Directors

**From:** William H. Lewis III, Business Director

**Date:** June 17, 2020

**Meeting Date:** June 25, 2020

**Re:** Financial Report

## **Financial Report**

The 2019-2020 Financial Board Report included in this packet reflects all revenues and expenditures for 2015-2018, and the budgeted YTD expenditures, plus encumbered amounts for 2019-2020 as of 06/17/20.

**Seismic Grant-**The district was informed it was successful in its competitive grant application for the Seismic Rehabilitation Grant Program from the State of Oregon. The district will receive \$2,474,249 to help retrofit the LHS gym with seismic upgrades.

**Budget Resolutions-**This district has made a small adjustment in the amount of \$1,151 in special revenue funds (200's) from the amount approved by the budget committee on June 14. The total for special revenue accounts is now \$17,437,871. The original amount approved by the budget committee was \$17,439,022. All other budgetary revenues and expenses are identical to what the budget committee approved on June 14.

### **Board Appropriations Resolution Request 1920-6**

This resolution is required by Oregon Budget Law and allows the district to spend from its budgetary appropriations in 2020-21.

### **Board Impose & Categorizing Tax Resolution Request 1920-7**

This resolution is required by Oregon Budget Law and allows the district impose the appropriate tax rate to pay for its outstanding general obligation bonds.

**Construction Excise Tax-**Administration is working Linn County on the Construction Excise Tax agreement with the county. We are working toward an approval at the June 25<sup>th</sup> meeting. If we do not receive a signed agreement from the county in time, administration will bring the agreement (and the agreement with the City of Lebanon) to next meeting in July or August.



## 2019-2020 General Fund Expenditure Report

Obj	Description	15/16 Actual	16/17 Actual	17/18 Actual	18/19 Project	19/20 Budget	6-17-20 YTD	6-17-20 Encumb	6-17-20 Balance
111	Certified salaries	9,311,147	10,161,648	10,831,007	12,299,845	12,665,056	9,214,155	2,992,231	458,670
112	Classified salaries	4,164,521	4,545,055	4,757,666	5,617,686	6,227,931	4,701,606	1,069,035	457,290
113	Administrative salaries	1,464,907	1,648,330	1,614,127	1,782,092	1,873,807	1,720,350	168,369	(14,912)
114	Managerial - classified	94,714	178,755	187,797	249,120	154,577	236,997	26,284	(108,704)
116	Retirement stipends	76,123	51,134	35,621	19,904	91,904	61,012	18,637	12,255
119	Confidential salaries	125,785	84,504	131,698	159,789	162,808	249,253	29,027	(115,472)
121	Certified subs	373,350	432,293	446,157	43,660	2,000	0	0	2,000
122	Classified subs	148,818	155,004	150,074	42,523	1,500	39,703	0	(38,203)
123	Temp certified	62,030	73,949	133,971	162,287	82,264	640	0	81,624
124	Temp classified	982	-	-	23,111	8,000	65,447	1,300	(58,747)
127	Student helpers salaries	11,768	7,895	6,544	4,413	21,000	12,364	0	8,636
132	Compensation time	23,861	25,767	37,764	77,738	52,300	62,829	4,439	(14,968)
133	Extra duty	254,381	324,897	286,017	350,933	279,579	183,786	5,733	90,060
134	Classified extra hrs	142,975	185,048	192,566	200,393	208,000	0	0	208,000
135	Vacation Payoff	4,377	6,938	12,246	14,017	29,817	81	0	29,736
136	Mentor teacher pay	990	609	-	-	-	0	0	-
137	Personal Leave Payout	75	-	-	-	-	150	0	(150)
138	Department Head Extra Duty	2,159	1,613	1,556	788	6,000	7,500	1,500	(3,000)
142	Taxable Meal Reimbursement	436	903	1,503	2,073	-	1,340	0	(1,340)
143	Cell Phone Stipend					-	990	90	(1,080)
145	Travel Stipend					-	10,450	950	(11,400)
150	Club Advisor				34,950	29,650	93,359	35,570	(99,279)
	<b>Total Salaries</b>	<b>16,263,399</b>	<b>17,884,343</b>	<b>18,826,313</b>	<b>21,136,091</b>	<b>21,896,193</b>	<b>16,725,424</b>	<b>4,355,988</b>	<b>814,781</b>
210	PERS	3,976,407	4,187,401	4,442,519	5,780,868	7,398,130	5,451,481	1,437,798	508,851
220	Social Security	1,207,537	1,328,140	1,385,595	1,550,125	1,655,388	1,219,617	311,396	124,375
231	Worker's Comp	136,822	173,370	196,943	238,867	293,025	151,514	29,219	112,292
241	Employee Ins - Admin	177,948	212,862	208,912	239,427	215,642	240,650	22,051	(47,059)
242	Employee Ins - Certified	2,307,416	2,328,554	2,370,817	2,831,052	2,449,421	1,989,161	645,103	(184,843)
243	Employee Ins - Classified	1,874,827	2,137,321	2,102,847	2,408,513	2,327,520	1,885,260	489,156	(46,896)
244	Employee Ins - Other	20,700	7,731	27,124	36,487	33,429	57,047	5,496	(29,114)
245	Employee Ins - Retired	276,090	228,774	195,821	122,925	83,600	73,781	0	9,819
247	TSA	42,912	40,991	22,082	24,336	25,200	41,800	3,800	(20,400)
248		-	-	-	-	-	56,438	1,635	(58,073)
249	Employee Tuition	-	-	-	-	-	0	0	-
	<b>Total Benefits</b>	<b>10,020,660</b>	<b>10,645,144</b>	<b>10,952,659</b>	<b>13,232,600</b>	<b>14,481,355</b>	<b>11,166,749</b>	<b>2,945,654</b>	<b>368,952</b>
311	Instructional Services	152,856	157,581	110,051	121,558	103,800	61,580	5,607	36,613
312	Instr Prog Improve Service	43,468	36,748	39,424	33,042	53,000	22,279	0	30,721

## 2019-2020 General Fund Expenditure Report

319	Other Instr-Prof-Tech SVCS	21,870	9,745	23,110	11,205	20,000	8,762	2,940	8,298
322	Repairs & Maintenance	163,270	168,482	173,295	254,579	190,300	194,517	20,428	(24,645)
323	Radio Service	-	7,767	38,310	12,455	11,100	3,450	0	7,650
324	Rentals	135,308	104,777	102,560	121,067	129,400	46,050	19,231	64,119
325	Electricity	467,896	473,758	466,093	453,206	502,620	376,136	85,098	41,386
326	Fuel	177,759	187,899	223,740	181,534	223,135	150,057	14,064	59,014
327	Water & Sewer	139,255	121,239	150,725	138,029	153,520	121,871	0	31,649
328	Garbage	86,324	96,811	95,095	112,864	102,400	68,563	0	33,837
329	Other Property Services	13,001	19,246	34,726	10,550	20,000	275	0	19,725
330	Reimb. Student Transportation	6,950	-	1,589	(64,563)	10,200	20,577	0	(10,377)
340	Travel	114,592	140,225	178,985	149,454	158,263	34,454	151	123,658
343	Travel - Student - Out of Dist.	-	-	2,916	1,140	5,300	68	0	5,232
346	Meals/Transportation	104	48	99	153	200	236	0	(36)
348	Staff Tuition	49,577	44,768	71,830	92,746	47,000	27,589	3,103	16,308
351	Telephone	82,642	70,529	39,486	44,987	73,165	40,628	2,960	29,577
353	Postage	23,607	21,909	14,712	24,224	26,074	15,344	699	10,031
354	Advertising	4,416	3,551	1,087	2,761	4,300	425	0	3,875
355	Printing & Binding	68,861	48,223	51,996	13,712	29,400	10,036	0	19,364
360	Charter School Payments	2,064,403	1,961,788	1,866,943	2,159,564	2,195,000	2,324,452	0	(129,452)
371	Tuitions Payments to Other Dist.	40,570	29,701	29,536	-	-	0	0	-
373	Tuition Pay Private School	-	-	-	-	5,000	0	0	5,000
374	Other Tuition	605,954	625,503	162,192	240,090	92,500	93,098	0	(598)
381	Audit Services	27,650	25,150	27,700	29,150	30,000	22,630	0	7,370
382	Legal Services	2,028	5,288	11,261	33,971	35,000	19,111	14,547	1,342
384	Negotiation Services	5,934	13,784	8,590	-	10,000	0	0	10,000
386	Data Processing SVCS	59,787	76,794	75,380	65,278	89,600	44,469	0	45,131
388	Election Services	4,565	-	1,573	4,623	5,000	0	0	5,000
389	Other Non_instr Pro/Tech	515,889	539,114	292,488	451,897	363,700	315,989	4,679	43,032
391	Physical Exams - Drivers	2,380	3,168	4,193	4,072	4,400	3,930	1,310	(840)
392	Drug Tests Drivers	1,110	635	1,255	1,670	3,000	925	1,075	1,000
393	Child Care Services	22,000	22,000	22,000	-	15,000	0	0	15,000
394	Sub calling service	5,559	7,489	6,464	14,113	15,000	8,730	0	6,270
396	Criminal History checks	2,546	2,928	3,179	4,066	3,200	2,668	0	532
398	Fingerprinting	639	462	266	38	1,000	2,301	0	(1,301)
399	Classified subs	-	-	-	499,109	425,000	338,430	0	86,570
	<b>Total P. Services</b>	<b>5,112,768</b>	<b>5,027,111</b>	<b>4,332,849</b>	<b>5,448,375</b>	<b>5,349,577</b>	<b>4,561,149</b>	<b>175,892</b>	<b>612,536</b>
406	Gas Oil & Lubricants	152,805	103,868	115,426	190,500	190,500	121,404	55,436	13,660
410	Supplies & Materials	457,671	419,096	486,014	452,860	648,024	396,205	10,226	241,593
413	Vehicle repair parts	50,201	48,980	44,746	27,649	52,800	33,523	15,643	3,634
414	Transportation operations	5,674	6,060	8,776	30,655	15,000	24,052	92	(9,144)
420	Textbooks	240,685	131,379	83,687	68,642	28,033	3,800	1,061	23,172

## 2019-2020 General Fund Expenditure Report

430	Library Books	9,934	8,588	5,880	5,914	15,694	4,012	0	11,682
440	Periodicals	6,012	1,937	5,354	6,511	6,000	9,294	0	(3,294)
460	Equipment under 5K	125,632	212,514	184,119	162,389	178,842	79,345	750	98,747
470	Computer software	173,513	195,888	181,289	184,472	264,360	161,734	5,994	96,632
480	Computer hardware	255,516	252,444	221,873	146,797	170,593	152,142	1,421	17,030
	<b>Total Supplies &amp; Materials</b>	<b>1,477,643</b>	<b>1,380,753</b>	<b>1,337,164</b>	<b>1,276,389</b>	<b>1,569,846</b>	<b>985,511</b>	<b>90,623</b>	<b>493,712</b>
520	Buildings Acquisition					-	5,496	0	(5,496)
540	Equipment	6,779	20,047	65,034	39,805	54,500	18,450	0	36,050
541	New Equipment over 5K		-			-	7,561	0	(7,561)
542	Replace of Equip over 5K		-			-	35,121	0	(35,121)
550	Depreciable Technology				7,579	-	10,000	0	(10,000)
564	Bus Replacement		-		258	-	0	0	-
590			-			-	0	0	-
	<b>Total Capital Outlay</b>	<b>6,779</b>	<b>20,047</b>	<b>65,034</b>	<b>47,641</b>	<b>54,500</b>	<b>76,628</b>	<b>0</b>	<b>(22,128)</b>
621	Regular Interest	-	-	-	-	500			500
640	Dues & Fees	92,488	67,655	178,632	101,706	175,180	\$75,982.92	\$2,609.00	96,588
650	Insurance & Judgments	216,456	218,639	230,250	245,279	265,588	261,905	0	3,683
659	Settlements	-	-	34,000		-	0	0	-
670	Taxes & Licenses	49	-	-	-	200	220	0	(20)
	<b>Total Other Objects</b>	<b>308,993</b>	<b>286,294</b>	<b>442,882</b>	<b>346,985</b>	<b>441,468</b>	<b>340,608</b>	<b>2,609</b>	<b>98,251</b>
707	Transfer - Vocational House Fund		-	-	40,000	-	0	0	-
710	Transfer - Technology	175,000	200,000	225,000	100,000	-	0	0	-
711	Transfer - Classroom Furniture	50,000	50,000	25,000	50,000	-	0	0	-
712	Transfer - Textbook Adoption	350,000	350,000	300,000	400,000	400,000	400,000	0	-
713	Transfer - Capital Improvement	225,000	250,000	250,000	400,000		0	0	-
714	Transfer - Track and Turf Fund	110,000	110,000	10,000	85,000	10,000	10,000	0	-
715	Transfer - Athletic Fund	365,000	365,000	405,000	446,000	450,000	450,000	0	-
716	Transfer - Bus Replacement	250,000	250,000	250,000	300,000	150,000	150,000	0	-
717	Transfer - Unemploy Ins	25,000	15,000	25,000	25,000	25,000	25,000	0	-
	Transfer - OHC Fund	-	-	-	-		0	0	-
718	PERS Reserve	150,000	500,000	500,000	525,000	-	0	0	-
719	Transfer - Food Service	50,000	65,225	90,656	100,000	100,000	100,000	0	-
730	Transfer - Debt Service	-	-	100,000	150,000	50,000	50,000	0	-
731	Transfer - Academic Achievemen	10,000	-	-	-	-	0	0	-
	<b>Total Transfers</b>	<b>1,760,000</b>	<b>2,155,225</b>	<b>2,180,656</b>	<b>2,621,000</b>	<b>1,185,000</b>	<b>1,185,000</b>	<b>0</b>	<b>-</b>
810	Reserve/Contingency	-	-	-	-	1,750,000	0	0	1,750,000
	<b>Grand Total</b>	<b>34,950,241</b>	<b>37,398,917</b>	<b>38,137,559</b>	<b>44,109,082</b>	<b>46,727,940</b>	<b>35,041,069</b>	<b>7,570,766</b>	<b>4,116,105</b>

## 2019-2020 General Fund Revenue Report

		15/16 Actual	16/17 Actual	17/18 Actual	18/19 Project	19/20 Budget	6-17-20 YTD	6-17-20 Balance
	SSF Formula							
1111,	Taxes	8,533,160	9,048,901	10,057,517	10,136,079	10,633,240	10,297,562	335,678
4801,4899	Federal Forest Fees	205,708	23,160	142,770	179,478	130,000	157,804	(27,804)
3103	Common School	492,013	502,314	410,848	437,082	405,245	196,120	209,125
2101	County School	-				-	209,250	(209,250)
3104	State Timber	181,382	137,286	167,068	167,048	160,000	23,587	136,413
3101/3199	School Support Fund	26,623,971	27,420,195	29,412,167	29,101,930	31,264,455	28,397,698	2,866,757
	Adjustments to SSF Payments							-
	Adj for Prior Year payments	(330,463)	261,223	250,598	(755,646)			-
	Adj for HC Disability Grant	76,394	129,474	29,635	439,748	-	-	-
	<b>Total SSF Formula</b>	<b>35,782,164</b>	<b>37,522,552</b>	<b>40,470,603</b>	<b>39,705,718</b>	<b>42,592,940</b>	<b>39,282,021</b>	<b>3,310,919</b>
								-
1510	Interest on Investments	91,245	156,492	267,981	322,591	300,000	272,023	27,977
								-
4200	Third Party billing	45,178	102,447	72,379	72,372	-	-	-
								-
2210	TMR	149,514	208,252	210,894	180,556	150,000	212,376	(62,376)
								-
4300	JROTC reimbursement	66,034	73,726	69,777	35,236	65,000	67,414	(2,414)
								-
	Other							-
1910	Rental Fees	10,474	9,114	7,731	3,626	10,000	1,582	8,418
1980	Fees Charged to Grants	800	-	-	-	100,000	-	100,000
1312,								
1960,								
1990,								
5300	Miscellaneous	202,944	213,437	284,801	358,144	300,000	179,554	120,446
1760	Club Fundraising	-				-	-	-
1411, 1993	Transportation Fees	-				-	4,538	(4,538)
1994	E-Rate reimbursement	82,910	76,847	68,007	-	80,000	-	80,000
								-
5200	Interfund Transfer - Athletics	60,000	60,000	82,657	8,029	850,000	-	850,000
								-
5400	Beginning Fund Balance	3,932,387	3,024,733	3,310,041	5,263,314	2,280,000	2,126,603	153,397
								-
	<b>Total</b>	<b>40,423,650</b>	<b>41,447,600</b>	<b>44,844,870</b>	<b>45,949,586</b>	<b>46,727,940</b>	<b>42,146,111</b>	<b>4,581,829</b>
		=====	=====	=====	=====	=====	=====	=====

## 2019-2020 General Fund Summary Report

	15/16 Actual	16/17 Actual	17/18 Actual	18/19 Budget	19/20 Budget	6-17-20 YTD & Enc	6-17-20 Balance
<b>General Fund - Revenue</b>							
SSF Formula	36,036,233	37,131,855	40,190,370	39,633,000	42,592,940	39,282,021	3,310,919
SSF Adjustment	(254,069)	390,697	280,233	-	-	-	-
State Fiscal Stabilization Fund					-	-	-
Federal Ed Jobs					-	-	-
School Year SubAccount					-	-	-
Loan Receipts					-	-	-
Interest	91,245	156,492	267,981	100,000	300,000	272,023	27,977
Third Party Billing	45,178	102,447	72,379	80,000	-	-	-
TMR	149,514	208,252	210,894	175,000	150,000	212,376	(62,376)
JROTC	66,034	73,726	69,777	65,000	65,000	67,414	(2,414)
Other	297,128	299,398	360,539	420,000	490,000	185,674	304,326
Interfund Transfer	60,000	60,000	82,657	70,000	850,000	-	850,000
BFB	3,932,387	3,024,733	3,310,041	5,075,000	2,280,000	2,126,603	153,397
<b>Total</b>	<b>40,423,650</b>	<b>41,447,600</b>	<b>44,844,870</b>	<b>45,618,000</b>	<b>46,727,940</b>	<b>42,146,111</b>	<b>4,581,829</b>
	=====	=====	=====	=====	=====	=====	=====
<b>General Fund - Expenses</b>							
Salaries	17,884,343	18,826,313	19,506,444	21,146,522	21,896,193	21,081,412	814,781
Benefits	10,645,144	10,952,659	12,144,929	13,883,105	14,481,355	14,112,403	368,952
P. Services	5,027,111	4,332,849	4,321,151	4,804,971	5,356,244	4,737,041	619,203
Supplies	1,380,753	1,337,164	1,742,328	1,670,267	1,566,513	1,076,134	490,379
Capital Outlay	20,047	65,034	195,888	54,500	54,500	76,628	(22,128)
Other Objects	286,294	442,882	335,817	437,635	438,135	343,217	94,918
Transfers	2,155,225	2,180,656	1,335,000	2,621,000	1,185,000	1,185,000	-
Contingency	-	-	-	1,000,000	1,750,000	-	1,750,000
<b>Total</b>	<b>37,398,917</b>	<b>38,137,559</b>	<b>39,581,557</b>	<b>45,618,000</b>	<b>46,727,940</b>	<b>42,611,835</b>	<b>4,116,105</b>
	=====	=====	=====	=====	=====	=====	=====