

Revisions:

Original: 2/19/20

Revision 1: 8/27/20 (Year 1)

Revision 2: 6/18/21 (Year 2)

STUDENT INVESTMENT ACCOUNT AGREEMENT
NORTH CLACKAMAS SCHOOL DISTRICT
CLACKAMAS MIDDLE COLLEGE

AUTHORITY

Pursuant to the "Student Success Act", codified at 2019 Oregon Laws Chapter 122 and as amended from time to time (the "Act"). North Clackamas School District (the "District") is authorized to distribute funding from District's allocation of the Student Investment Account as described in Section 10, subsection 4 of the Act.

PURPOSE

The purpose of the programs under which this Grant is issued is to provide Clackamas Middle College (the "Grantee") funding to meet students' mental or behavioral health needs and increase academic achievement for students, including reducing academic disparities for students that are economically disadvantaged; from racial or ethnic groups that have historically experienced academic disparities; with disabilities; who are English language learners; who are foster children; who are homeless; and any others as determined by the State Board of Education.

EFFECTIVE DATE AND DURATION

When all Parties have executed this Grant, and all necessary approvals have been obtained (the "Executed Date"), this Grant shall be effective and have a grant funding start date that is the same as the District's effective date with the Oregon Department of Education (the "Department") (the "Effective Date"), and, unless terminated earlier in accordance with its terms, shall expire on the same date as the District's agreement with ODE (the "Expiration Date").

PROJECT ACTIVITIES

Grantee shall perform the project activities set forth in Exhibit A (the "Project"), attached hereto and incorporated herein by this reference for the period beginning on the Effective Date and ending on the Expiration Date (the "Performance Period"). *Exhibit B applies to the 2021-2022 school year. Exhibit C will apply to the 2022-2023 school year and will be drafted prior to the end of the 2021-2022 school year.*

GRANT FUNDS AND EXCHANGE OF SERVICES

Grantee Allocation. In accordance with the terms and conditions of this Grant, the District shall provide Grantee 100% less an indirect rate of 2.5% of the SIA Allocation amount generated by the ADMw attributed to the Grantee and published by ODE in the quarterly SIA Allocations

report for the purposes described in Exhibit A. District shall pay the Grantee from monies available through its District SIA Grant Allocation (the "Funding Source"). Funds received by the Grantee under this Agreement (the "Grant Funds") may be used only for eligible expenditures authorized by this Grant and incurred during the Performance Period.

Indirect Rate. Indirect costs shall not exceed 5 percent (5%) of the total District's Allocation and expenditures or \$500,000, whichever is less. District will retain 2.5 percent (2.5%) of the Grantee's allocation for indirect costs. Grantee may use up to 2.5 percent (2.5%) of the Grantee's allocation for indirect costs. Any indirect costs incurred by the Grantee must be accounted for within the District's limit of 5 percent or \$500,000, whichever is less.

The Grantee must establish a separate account for all funds received as part of the Grant.

DISBURSEMENT GENERALLY

Disbursement. By September 10, 2020 and annually on September 10 thereafter, District will provide Grantee with a written timeline for Grantee expenditure documentation to be submitted to District and a written schedule of disbursements. Grantee will be required to provide expenditure documentation to District at least ten (10) business days prior to District's required submission dates to any agency of the State of Oregon.

District shall disburse Grant Funds by either check or Electronic Funds Transfer within twenty (20) business days of District receiving an SIA allocation from ODE.

If District determines that any completed Project activities or documentation are not acceptable and that any deficiencies are the responsibility of Grantee, District shall prepare a detailed written description of the deficiencies and will deliver such notice to Grantee. Grantee shall correct any deficiencies at no cost to District.

All expenses must adhere strictly to ODE guidance and rules adopted by the State Board of Education regarding the allowable uses of SIA grant funds.

Conditions Precedent to Disbursement. District's obligation to disburse Grant Funds to Grantee under this Grant is subject to satisfaction of each of the following conditions precedent:

- District has received sufficient funding to allow District, in the exercise of its reasonable administrative discretion, to make the disbursement.
- No default has occurred.
- Grantee's representations and warranties set forth in this agreement are true and correct on the date of disbursement(s) with the same effect as though made on the date of disbursement.

Recovery of Grant Funds. Any Grant Funds disbursed to Grantee under this Grant that are expended in violation or contravention of one or more of the provisions of this Grant ("Misexpended Funds") or that remain unexpended on the earlier of termination or expiration of this Grant ("Unexpended Funds") must be returned to District. Grantee shall return all

Misexpended Funds and Unexpended Funds to District promptly after District's written demand but in any event no later than 30 calendar days after the District's written demand.

Duplicate Payment. Grantee shall not be compensated for, or receive any other form of duplicate, overlapping or multiple payments for the same costs financed by or costs and expenses paid for by Grant Funds from any agency of the State of Oregon or the United States of America or any other party, organization or individual.

REPRESENTATIONS AND WARRANTIES

Organization/Authority. Grantee represents and warrants to District that:

- Grantee is an Oregon Nonprofit Corporation duly organized and validly existing under the laws of the State of Oregon, is eligible to receive the Grant Funds and has full power, authority and legal right to make this Grant and to incur and perform its obligations hereunder;
- The making and performance by Grantee of this Grant (a) have been duly authorized by Grantee, (b) do not and will not violate any provision of any applicable law, rule, regulation, or order of any court, regulatory commission, board, or other administrative agency or any provision of Grantee's Articles of Incorporation or Bylaws; and (c) do not and will not result in the breach of, or constitute a default or require any consent under any other agreement or instrument to which Grantee is a party or by which Grantee or any of its properties may be bound or affected. No authorization, consent, license, approval of, or filing or registration with or notification to any governmental body or regulatory or supervisory authority is required for the execution, delivery or performance by Grantee of this Grant, other than those that have already been obtained;
- This Grant has been duly executed and delivered by Grantee and constitutes a legal, valid and binding obligation of Grantee enforceable in accordance with its terms;
- Grantee is, and throughout the Performance Period will be, in compliance with its charter agreement and all Oregon laws applicable to charter schools operating in the State of Oregon including, without limitation, ORS 338.035; The representations and warranties set forth in this section are in addition to, and not in lieu of, any other representations or warranties provided by Grantee.

GOVERNING LAW, CONSENT TO JURISDICTION

This Grant shall be governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively "Claim") between District or any other agency or department of the State of Oregon, or both, and Grantee that arises from or relates to this Grant shall be brought and conducted solely and exclusively within the Circuit Court of Clackamas County for the State of Oregon; provided, however, if a Claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or

otherwise, to or from any Claim or from the jurisdiction of any court. Grantee, BY EXECUTION OF THIS GRANT, HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF SAID COURTS.

PERFORMANCE TARGETS

Grantee will identify longitudinal performance growth targets (the "Targets") in accordance to the guidance published by the Department. Targets will be included with the Grantee's Project in Exhibit A and identified for each year of the Performance Period. Targets must minimally include the Targets included in Section 12, subparagraph 3 of the Act for which the Grantee serves students. Targets must be disaggregated according to Section 12, subparagraph 1 of the Act.

Grantee shall use the same Targets as the District's Targets in each Target for which the Grantee serves students and has accountability data. In addition to those Targets required by the Act, Grantee may identify local Targets.

Grantee will report to District each year on its progress toward meeting Targets in the Grantee's annual report as per ORS 338.095 or as mutually agreed upon by both Parties.

INDEMNIFICATION

Grantee shall defend, save, hold harmless, and indemnify the District and their officers, employees and agents from and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature whatsoever, including attorney's fees, resulting from, arising out of, or relating to the activities of Grantee or its officers, employees, subcontractors, or agents under this Grant (each of the foregoing individually or collectively a "Claim" for purposes of this section).

Limitation. Except as provided in this Section, neither Party will be liable for incidental, consequential, or other direct damages arising out of or related to this Grant, regardless of whether the damages or other liability is based in contract, tort (including negligence), strict liability, product liability or otherwise. Neither party will be liable for any damages of any sort arising solely from the termination of this Grant in accordance with its terms.

DEFAULT

Grantee. Grantee will be in default under this Grant upon the occurrence of any of the following events:

- Grantee fails to perform, observe or discharge any of its financial accounting or reporting requirements under this Grant.
- Grantee uses or expends Grant Funds for any purpose other than that defined in this Grant.

District. District will be in default under this Grant if District fails to perform, observe or discharge any of its covenants, agreements, or obligations under this Grant.

REMEDIES

District Remedies. In the event Grantee is in default, District may, at its option, pursue any or all of the remedies available to it under this Grant and at law or in equity, including, but not limited to (a) termination of this Grant, (b) reducing or withholding payment for Project activities that Grantee has failed to complete according to the Act, (c) requiring Grantee to complete, at Grantee's expense, additional activities necessary to satisfy its obligations or meet performance standards under this Grant, (d) withholding payment of State School Funds, (e) exercise of its right of recovery of overpayments under this agreement or setoff, or both, or (g) pursue termination of the charter contract as per ORS 338.105. These remedies are cumulative to the extent the remedies are not inconsistent, and District may pursue any remedy or remedies singly, collectively, successively or in any order whatsoever.

Grantee Remedies. In the event District is in default and whether or not Grantee elects to exercise its right to terminate this Grant, or in the event District terminates this Grant, Grantee's remedy may be exercised through any dispute provisions in this agreement or in the current executed charter contract. If previous amounts paid to Grantee exceed the amount due to Grantee, Grantee shall promptly pay any excess to District.

RECOVERY OF OVERPAYMENTS

If payments to Grantee under this Grant, or any other agreement between District and Grantee, exceed the amount to which Grantee is entitled, District may, after notifying Grantee in writing, withhold from payments due Grantee under this Grant, such amounts, over such periods of times, as are necessary to recover the amount of the overpayment.

LIMITATION OF LIABILITY

EXCEPT FOR LIABILITY ARISING UNDER OR RELATED TO SECTION 11, NEITHER PARTY WILL BE LIABLE FOR INCIDENTAL, CONSEQUENTIAL, OR OTHER INDIRECT DAMAGES ARISING OUT OF OR RELATED TO THIS GRANT, REGARDLESS OF WHETHER THE LIABILITY CLAIM IS BASED IN CONTRACT, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY, PRODUCT LIABILITY OR OTHERWISE. NEITHER PARTY WILL BE LIABLE FOR ANY DAMAGES OF ANY SORT ARISING SOLELY FROM THE TERMINATION OF THIS GRANT IN ACCORDANCE WITH ITS TERMS.

TERMINATION

Mutual. This Grant may be terminated at any time by mutual written consent of the Parties.

By District. District may terminate this Grant as follows:

- Upon 30 calendar days advance written notice to Grantee;
- Immediately upon written notice to Grantee, if District fails to receive funding, or allocations, limitations or other expenditure authority at levels sufficient in District's reasonable administrative discretion, to perform its obligations under this Grant;
- Immediately upon written notice to Grantee, if federal or state laws, rules, regulations or guidelines are modified or interpreted in such a way that the District's performance under this Grant is prohibited or District is prohibited from paying for such performance from the planned funding source;
- Immediately upon written notice to Grantee, if Grantee is in default under this Grant and such default remains uncured 30 calendar days after written notice thereof to Grantee; or
- As otherwise expressly provided in this Grant.

By Grantee. Grantee may terminate this Grant as follows:

- Upon 30 calendar days advance written notice to District;
- Immediately upon written notice to District, if District is in default under this Grant and such default remains uncured 30 calendar days after written notice thereof to District; or
- As otherwise expressly provided in this Grant.

Cease Activities. Upon receiving a notice of termination of this Grant, Grantee will immediately cease all activities under this Grant, unless District expressly directs otherwise in such notice. Upon termination, Grantee will deliver to District all documents, information, and reports related to the Grant.

INSURANCE

Grantee shall maintain insurance set forth in the charter contract and any necessary insurance to cover activities related to the Project.

NONAPPROPRIATION

District's obligation to pay any amounts and otherwise perform its duties under this Grant is conditioned upon District receiving funding, appropriations, limitations, allocations, or other expenditure authority sufficient to allow District, in the exercise of its reasonable administrative discretion, to meet its obligations under this Grant.

AMENDMENTS

The terms of this Grant may not be altered, modified, supplemented or otherwise amended, except by written agreement of the Parties.

NOTICE

Except as otherwise expressly provided in this Grant, any notices to be given relating to this Grant must be given in writing by facsimile, email, personal delivery, or postage prepaid mail, to the school district's superintendent or charter school's lead administrator. Any notice so addressed and mailed becomes effective five (5) calendar days after mailing. Any notice given by personal delivery becomes effective when actually delivered. Any notice given by email becomes effective upon the sender's receipt of confirmation generated by the recipient's email system that the notice has been received by the recipient's email system. Any notice given by facsimile becomes effective upon electronic confirmation of successful transmission to the designated fax number.

SEVERABILITY

The Parties agree that if any term or provision of this Grant is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected, and the rights and obligations of the Parties will be construed and enforced as if the Grant did not contain the particular term or provision held to be invalid.

COUNTERPARTS

This Grant may be executed in several counterparts, all of which when taken together shall constitute one agreement, notwithstanding that all Parties are not signatories to the same counterpart. Each copy of the Grant so executed constitutes an original.

COMPLIANCE WITH LAW

In connection with their activities under this Grant, the Parties shall comply with all applicable federal, state and local law.

INTENDED BENEFICIARIES

District and Grantee are the only parties to this Grant and are the only parties entitled to enforce its terms. Nothing in this Grant provides, is intended to provide, or may be construed to provide any direct or indirect benefit or right to third parties unless such third parties are individually identified by name herein and expressly described as intended beneficiaries of this Grant.

TIME IS OF THE ESSENCE

Time is of the essence in Grantee's performance of the Project activities under this Grant.

MERGER, WAIVER

This Grant and all exhibits and attachments, if any, constitute the entire agreement between the Parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Grant. No waiver or consent under this Grant binds either Party unless in writing and signed by both Parties. Such waiver or consent, if made, is effective only in the specific instance and for the specific purpose given. EACH PARTY, BY SIGNATURE OF ITS AUTHORIZED REPRESENTATIVE, HEREBY ACKNOWLEDGES THAT IT HAS READ THIS GRANT, UNDERSTANDS IT, AND AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS.

RECORDS MAINTENANCE, MUNICIPAL AUDIT, AND ACCESS

Grantee shall maintain all financial records relating to this Grant in accordance with generally accepted accounting principles. In addition, Grantee shall maintain any other records, books, documents, papers, plans, records of shipments and payments, and writings of Grantee, whether in paper, electronic or other form, that are pertinent to this Grant in such a manner as to clearly document Grantee performance. All financial records, other records, books, documents, papers, plans, records of shipments and payments, and writings of Grantee, whether in paper, electronic or other form, that are pertinent to this Grant, are collectively referred to as "Records." Grantee acknowledges and agrees that District and the Oregon Secretary of State's Office and their duly authorized representatives will have access to all Records to perform examinations and audits and make excerpts and transcripts. All Funds received by Grantee as part of the Grant shall be accounted for separately and included in the Grantee's municipal audit according to ORS 338.095 and reported to District annually. Grantee shall retain and keep accessible all Records for a minimum of five (5) years, or such longer period as may be required by applicable law, following termination of this Grant, or until the conclusion of any audit, controversy or litigation arising out of or related to this Grant, whichever date is later.

HEADINGS

The headings and captions to sections of this Grant have been inserted for identification and reference purposes only and may not be used to construe the meaning or to interpret this Grant.

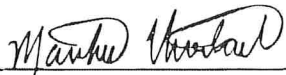
GRANT DOCUMENTS

This Grant consists of the following documents, which are listed in descending order of precedence: this Grant less all exhibit Exhibit A (the "Project").


SIGNATURES

IN WITNESS WHEREOF, the Parties have executed this Grant as of the dates set forth below.

NORTH CLACKAMAS SCHOOL DISTRICT

By:  2/19/2020
School District Representative Date
MATTHEW UTTERBACK, SUPERINTENDENT
Printed Name, Title

CLACKAMAS MIDDLE COLLEGE

By:  2/7/20
Charter School Representative Date
Brian Sien, Principal
Printed Name, Title

Revision for Year 2: Acknowledgment of the establishment of a separate Exhibit for each school year:

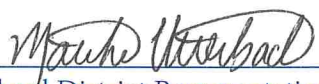

By  6/22/21
School District Representative Date
By  6/22/21
Charter School Representative Date



EXHIBIT A
THE PROJECT - YEAR 1 (2020-2021)

SECTION I – CHARTER SCHOOL SIA PLAN

The Grantee will develop a three-year (3 year) plan to implement grant activities aligned to the purpose and allowed uses of funds. The three-year plan must include a budget, strategies, activities, and longitudinal performance growth targets.

SECTION II – DISTRICT APPROVAL

The Project must include a budget and a description of activities for the Performance Period of the Grant. Budget will be based on SIA Allocation/Disbursement Reports published by the Department. Grantee will submit the Project to District at least forty-five (45) calendar days before the District's SIA application is scheduled to be approved by the District school board and shall be included with the District's SIA application to the Department.

The District will review and approve the Grantee's Project within twenty-five (25) calendar days of receipt. If the District determines Grantee budget does not align to the allowed uses of Funds according to Section 10, subparagraph 4 of the Act, District may provide detailed written notice to the Grantee and require Grantee revise Project within twenty (20) calendar days.

District school board approval does not necessarily mean endorsement or agreement with the Grantee's Project.

SECTION III – BUDGET AND ACTIVITIES

The Grantee shall develop a budget for the Project aligned to the allowed uses in Section 9, subparagraph 3 of the Act. Grantee will identify at least one strategy and supporting activities with appropriate budget.

The Project	
Project Years: 2020-21, 2021-22, 2022-23	
Brief Description of Charter School (include enrollment number and demographic information from last State Report Card)	<ul style="list-style-type: none">• 300 Students• 60%-Female• 40%-Male• 3%-Asian• 2%-African American• 73%-White• 14%-Hispanic• 8%-Two or More• 8%-SPED• 38%-English Language Learners• 32%-Free/Reduced Lunch

Needs Assessment Sources Reviewed (including methods of community engagement)	<ul style="list-style-type: none"> • Attendance data • PSAT data • High school credits • College credits • Oregon Healthy Teens Survey • YouthTruth Survey • Parent focus group • staff focus group • student focus group
Strengths identified in Needs Assessment	<ul style="list-style-type: none"> • Dropout rate • Graduation rate • Small class sizes • College credit attainment • Counselor to student ratio • Positive school culture
Challenges identified in Needs Assessment	<ul style="list-style-type: none"> • Urban building location (increase safety methods) • Trauma Informed Care for students and staff • Improve service delivery model for students with disabilities • Improve proactive academic interventions for students

Activities of Grantee		Allowable Uses Category	Budget
Strategy 1: Mental Health and Social Services			\$75,000 Per Year
2020-2021	Provide a full-time staff member focused on mental health	Health and Safety	\$75,000 \$59,973.88
2021-2022	Provide a full-time staff member focused on mental health	Health and Safety	\$75,000
2022-2023	Provide a full-time staff member focused on mental health	Health and Safety	\$75,000
Strategy 2: Academic Support			\$10,000 Per Year
2020-2021	Increase time for instructional assistant for students with disabilities to provide one-on-one math and reading support based on student need	Instructional Time	\$10,000
2021-2022	Increase time for instructional assistant for students with disabilities to provide one-on-one math and reading support based on student need	Instructional Time	\$10,000
2022-2023	Increase time for instructional assistant for students with disabilities to provide one-on-one math and reading support based on student need	Instructional Time	\$10,000
Strategy 3: Academic Support			\$62,445.04 Per Year
2020-2021	Broaden curricular options by increasing access to dual credit programs and career technical education through local community colleges and universities	Well-Rounded Education	\$62,445.04
2021-2022	Broaden curricular options by increasing access to dual credit programs and career technical education through local community colleges and universities	Well-Rounded Education	\$62,445.04
2022-2023	Broaden curricular options by increasing access to dual credit programs and career technical education through local community colleges and universities	Well-Rounded Education	\$62,445.04
Strategy 4: Retention/Recruitment of a Diverse Staff			\$45,000 Per Year
2020-2021	Provide a staff member to develop strong family-school relationships for students who speak a language other than English at home to promote the inclusion of all students.	Health and Safety	\$45,000

2021-2022	Provide a staff member to develop strong family-school relationships for students who speak a language other than English at home to promote the inclusion of all students.	Health and Safety	\$45,000
2022-2023	Provide a staff member to develop strong family-school relationships for students who speak a language other than English at home to promote the inclusion of all students.	Health and Safety	\$45,000
Subtotal Per-Year			\$192,445.04
YEAR 1			\$59,973.88
2.5% CMC Indirect Per-Year			\$5,064.35
YEAR 1			\$1578.25
2.5% NCSD Indirect Per-Year			\$5,064.34
YEAR 1			\$1578.25
Total Per-Year			\$202,573.73
YEAR 1			\$63,130.38

SECTION IV – UPDATES AND REVISIONS

If there are changes to the Grantee Project, the Grantee shall submit an updated or revised Project with budget to District at least thirty (30) calendar days prior to the Department's next disbursement of SIA Funds to the District. The District may review the Project to ensure alignment to the allowed uses in Section 9, subparagraph 3 of the Act.

SECTION V – ACCOUNTABILITY

The Grantee shall report annually on the longitudinal performance growth targets below in the charter school annual report.

Longitudinal Performance Growth Target Description (including relevant student groups, if applicable). When possible, use data from most recent State Report Card as a baseline.		Target
2020-2021	<ul style="list-style-type: none"> Ninth Graders on Track with Six Credits All Students Graduate High School Post-Secondary Enrollment Rates Increase 	Same targets as NCSD
2021-2022	<ul style="list-style-type: none"> Ninth Graders on Track with Six Credits All Students Graduate High School Post-Secondary Enrollment Rates Increase 	Same targets as NCSD
2022-2023	<ul style="list-style-type: none"> Ninth Graders on Track with Six Credits All Students Graduate High School Post-Secondary Enrollment Rates Increase 	Same targets as NCSD

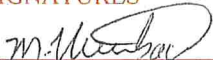


SECTION VI – FINANCIAL REPORTING

The Grantee shall report all expenses paid with Grant Funds to District within 180 calendar days of disbursement. The report shall include accounting and evidence of alignment to the allowed uses in Section 9, subparagraph 3 of the Act. At the District's request, the Grantee shall provide District expense report within fifteen (15) calendar days at any time during the Performance Period.

EXHIBIT A amended ^{WRU} ~~8/31/2020~~ to reflect planned activities responsive to Student Investment Account revised funding notification from Oregon Department of Education.

SIGNATURES



Matt Utterback
Superintendent
North Clackamas School District

8/27/2020

DATE



Brian Sien
Principal
Clackamas Middle College

8/26/20

DATE



EXHIBIT B

THE PROJECT - YEAR 2 (2021-2022)

SECTION I – CHARTER SCHOOL SIA PLAN

The Grantee will develop a three-year (3 year) plan to implement grant activities aligned to the purpose and allowed uses of funds. The three-year plan must include a budget, strategies, activities, and longitudinal performance growth targets.

SECTION II – DISTRICT APPROVAL

The Project must include a budget and a description of activities for the Performance Period of the Grant. Budget will be based on SIA Allocation/Disbursement Reports published by the Department. Grantee will submit the Project to District at least forty-five (45) calendar days before the District's SIA application is scheduled to be approved by the District school board and shall be included with the District's SIA application to the Department.

The District will review and approve the Grantee's Project within twenty-five (25) calendar days of receipt. If the District determines Grantee budget does not align to the allowed uses of Funds according to Section 10, subparagraph 4 of the Act, District may provide detailed written notice to the Grantee and require Grantee revise Project within twenty (20) calendar days.

District school board approval does not necessarily mean endorsement or agreement with the Grantee's Project. *The Grantee will submit required documentation to the Oregon Department of Education as required by the state's grant guidelines.*

SECTION III – BUDGET AND ACTIVITIES

The Grantee shall develop a budget for the Project aligned to the allowed uses in Section 9, subparagraph 3 of the Act. Grantee will identify at least one strategy and supporting activities with appropriate budget.

The Project	
Project Years: 2020-21, 2021-22, 2022-23	
Brief Description of Charter School (include enrollment number and demographic information from last State Report Card)	<ul style="list-style-type: none">• 300 Students• 60%-Female• 40%-Male• 3%-Asian• 2%-African American• 73%-White• 14%-Hispanic• 8%-Two or More• 8%-SPED• 38%-English Language Learners• 32%-Free/Reduced Lunch



Needs Assessment Sources Reviewed (including methods of community engagement)	<ul style="list-style-type: none"> • Attendance data • PSAT data • High school credits • College credits • Oregon Healthy Teens Survey • YouthTruth Survey • Parent focus group • staff focus group • student focus group
Strengths identified in Needs Assessment	<ul style="list-style-type: none"> • Dropout rate • Graduation rate • Small class sizes • College credit attainment • Counselor to student ratio • Positive school culture
Challenges identified in Needs Assessment	<ul style="list-style-type: none"> • Urban building location (increase safety methods) • Trauma Informed Care for students and staff • Improve service delivery model for students with disabilities • Improve proactive academic interventions for students

Student Investment Account		Relevant Strategy				
		S1	S2	S3	S4	S5
Outcome	Cultivating a safe, caring and inclusive learning environment where members of the school community are valued, their identities are affirmed, and they feel emotionally supported, thus reducing academic disparities.	X	X	X	X	X
Outcome	Ensuring that every student has at least one adult in the school community who addresses, responds to, and meets each student's academic, social, emotional, and physical needs.	X	X	X	X	X
Outcome	Supporting student learning with rigorous, culturally relevant and flexible instruction, student centered curriculum and high expectations while providing instructional supports and systems to meet the needs of all students. Students will develop a personalized postsecondary path, thus providing access to rigorous academic high school and college courses.	X	X	X	X	X
Outcome	Strengthen connections between our students, our schools, and our community.	X	X	X	X	X
Outcome	Attract, hire and retain high-quality staff that reflect the student demographics of the school while elevating the professional capacity of our staff to meet the needs of today's learners. This will allow teachers and staff sufficient time to collaborate, review data, develop strategies to help students stay on track to graduate.	X	X	X	X	X

Strategy #1	Create a culture of safety and respect for all students and adults that support the social, emotional, and physical well-being of students and adults that is critical to academic and professional success. (Mental Health and Social Services)
Strategy #2	Reduce barriers for accessing academic interventions, support, and resources for students in high school and college classes. (Academic Support)
Strategy #3	Provide expanded courses and resources connected to students' educational plan/pathway toward their high school diploma, and/or college certificate or degree. (Academic Support)
Strategy #4	Recruit, expand, and invest in diverse teams of professionals to support academic, behavioral health and wellness needs of students and families. (Strengthening Partnerships and Community Connections)
Strategy #5	Invest in systematic professional learning connected to best practices around equity, academic success through curriculum, and effective instructional techniques. (Academic Support)



Oregon Dept. of Education Budget Tool - CMC Submission - June 2021

Activity #	FTE	Allowable Use Category	Object Code	1. Briefly describe the proposed activity (Column "E"). 2. Select the appropriate "Allowable Use Category" that best fits the activity from the drop down list (Column "C"). 3. Select the appropriate "Object Code" that best fits the activity from the dropdown list (Column "D"). If the desired object code is not listed, select "OTHER" and include a note in the justification narrative. 4. Enter FTE, if any is associated with the activity item (Column "B"). 5. Enter budgeted amount (Column "F"). 6. Provide a brief narrative justification for the activity and budgeted amount (Column "H"). The sheet will auto sum the budgeted amounts as long as an OBJECT code is selected.	\$ Amount
Total Allocation					\$ 160,597.41
Total Expenditures:					\$ 156,582.47
Total Administrative Costs					\$ 4,014.94
Unbudgeted Funds:					\$0.00
Proposed Activity					
1	0	ADMIN		Admin Costs	\$ 4,014.94
2	0	H&S	31x	Contract for a full-time professional focused on mental health. (<i>Strategy 1 - Create a culture of safety and respect for all students and adults that support the social, emotional, and physical well-being of students and adults that is critical to academic and professional success</i>)	\$ 77,770.00
3	0	IIT	8xx	Increase time for instructional assistant for students with disabilities to provide one-on-one math, reading and writing support based on student need. Remove barriers (fees, textbooks, tutoring, courses) for students accessing academic resources. (<i>Strategy 2-Reduce barriers for accessing academic interventions, support, and resources for students in high school and college classes</i>)	\$ 28,812.47
4	0	WRE	640	Broaden curricular options by increasing access to dual credit programs and career technical education through local community colleges and universities. (<i>Strategy 3- Provide expanded courses and resources connected to students' educational plan/pathway toward their high school diploma, and/or college certificate or degree</i>)	\$ 50,000.00
5	0	OCG	31x	Provide school teams with: Nurse, School-Based Therapist, School Psychologist, Grade-Level College and Career Advisor, Building Administrator, School Counselor, Special Education Staff, English Language Development Specialist, School Safety Coordinator, Drug and Alcohol Counselor, and a Community Liaison. (<i>Strategy 4- Recruit, expand, and invest in diverse teams of professionals to support academic, behavioral health and wellness needs of students and families</i>)	\$ -
6	0	WRE	31x	Provide instructional teams with professional developments around cultural proficiency, equity-based grading, and creating equity-based assessments. (<i>Strategy 5- Invest in systematic professional learning connected to best practices around equity, academic success through curriculum, and effective instructional techniques</i>)	\$ -



SECTION IV – UPDATES AND REVISIONS

If there are changes to the Grantee Project, the Grantee shall submit an updated or revised Project with budget to District at least thirty (30) calendar days prior to the Department's next disbursement of SIA Funds to the District. The District may review the Project to ensure alignment to the allowed uses in Section 9, subparagraph 3 of the Act.

If the Grantee is not able to actualize components of this Project, a shift to the actions listed below will be implemented in alignment with the District's Tiered Project Implementation. The Grantee's proactive plan to anticipate and consider modifications to SIA plan activities and expenditures as a result of workforce shortages or other scenarios where initial plans and priorities may require the following adjustments:

- Temporary classified staff including instructional assistants to support academic or physical/mental health needs (Class Size and Caseloads)
- Purchase technology, curriculum and supplies in English Language Arts, math, and science to meet the needs of the additional teachers. Any unused funds in the salary/benefits of licensed educators will be reallocated to purchase curriculum and technology. (Well Rounded Education)
- Financial supports for planning teams or groups to design future work. (Well Rounded)
- Maintain community school programs at existing sites. (Well Rounded Education)
- Provide targeted core academic "jumpstart" in middle school afterschool programs. (Well Rounded Education)
- Purchase instructional materials and technology to support World Languages or the Arts. (Well Rounded Education)

SECTION V - FINANCIAL REPORTING

The Grantee shall report all expenses paid with Grant Funds to the District within 180 calendar days of disbursement. The report shall include accounting and evidence of alignment to the allowed uses in Section 9, subparagraph 3 of the Act. At the District's request, the Grantee shall provide District expense report within fifteen (15) calendar days at any time during the Performance Period.

Signatures

A handwritten signature in blue ink, appearing to read "Matt Utterback", written over a horizontal line.

Matt Utterback
Superintendent
North Clackamas Schools District

A handwritten signature in blue ink, appearing to read "Brian Sien", written over a horizontal line.

Brian Sien
Director
Clackamas Middle College