



Tumwater School District

MEMORADUM

DATE: November 9, 2023
TO: Tumwater School District Board of Directors
FROM: Wendy Bromley, Executive Director of Human Resources
SUBJECT: Human Resources 23-24 Update

Dear School Board Members,

I am writing to update the School Board on the Human Resources Department's strategic goals and initiatives aimed at enhancing our services and operations. Our department is committed to advancing our capabilities in several key areas: creating world-class customer service, recruiting and hiring talented staff, addressing hard-to-fill positions, and systemizing and modernizing our processes.

- 1. Creating World-Class Customer Service:** We recognize that exceptional customer service is pivotal to the success of our school district. A couple of examples are:
 - The HR department is making personalized visits to each school to introduce ourselves and take questions.
 - Lindsey Owens has set up open lab time for paraprofessionals to come in and get support pursuing advanced paraprofessional licenses.
- 2. Recruitment and Hiring of Talented Staff:** Attracting and retaining talented individuals is essential to maintaining the excellence of our school district. Our initiatives in this regard include:
 - Formulating a robust recruitment strategy that targets potential candidates from a broad range of sources.
 - Enhancing our onboarding process to ensure new hires seamlessly integrate into the district.
- 3. Filling Hard-to-Fill Positions:** We acknowledge that certain positions pose challenges in recruitment. To address this issue, we are implementing these strategies:
 - Collaborating with schools and departments to identify hard-to-fill positions and developing tailored recruitment plans.
 - Creative and innovative ideas to approach filling vacancies.
- 4. Systemizing and Modernizing the Department:** In our quest to modernize and streamline HR operations, we are taking the following steps:
 - Evaluating and implementing modern HR information systems and software to improve data management, analytics, and reporting.
 - Standardizing and automating key HR processes, such as onboarding and performance evaluations.

- Upgrading our online job application and recruitment platform for greater efficiency and candidate experience.

Additional HR facts:

- The Human Resources department has entirely changed over since last year, with a new Executive Director, a new HR Coordinator, two new HR Specialists 2's, a new HR Specialist 1, and just offered a position – a new Benefits Coordinator to start this next month.
- HR has processed 249 new employees this year
- TSD has 1004 employees and 352 substitutes



Human Resources 23-24 Update

Human Resources



Stephanie Brownell
Coordinator



Amanda Curtis
HR Specialist II



Heather Cherniske
HR Specialist I



Lindsey Owens
HR Specialist II

WORLDCLASS CUSTOMER SERVICE

- High expectations
- School and site visits
- Open lab time
- Regularly scheduled labor relations meetings



RECRUITMENT & HIRING TALENTED STAFF

- Job Fairs
- Post Cards
- Social Media
- Radio Spots
- Video

5 REASONS to Sub as a Teacher in Tumwater!

- 1 Great pay! Start at \$200/day
- 2 Earn \$331 per day (after 20 consecutive days or 30 non-consecutive days)
- 3 Flexible placement
- 4 Flexible schedule
- 5 We have amazing students, staff, and schools!

Call 360-464-6857 or 360-464-6855 for more information

Human Resources

[Department Homepage](#)

[Contact Us](#)

[Employment Opportunities](#)

[Open Positions](#)

[New Applicants](#)

[Fingerprinting](#)

[FAQ](#)

[Equal Opportunity & Affirmative Action](#)

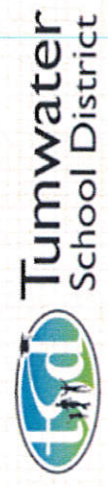
[Taking an Extended Leave](#)

[HR Forms](#)

[Union Contracts & Salary Schedules](#)

[+ Certification Resources](#)

[+ Employee Benefits](#)



CURRENT OPEN POSITIONS

UPDATED ONLY

OPEN CLASSIFIED POSITIONS

Bus Driver / Bus Driver Trainee Job #23-1075
 Stadium Events Manager Job #23-1074

Certificated Occupational Therapist Asst. Job #23-1140
 IMPACT Para Job #23-1156

Evening Custodian Job #23-1171
 Registered Behavior Tech Job #23-1172

OPEN CERTIFICATED POSITIONS

School Psychologist Job #23-1124
 Occupational Therapist Job #23-1000

School Nurse RN Job #23-1182
 ABC Special Education Teacher @ THE Job #23-1183

OPEN CO-CURRICULAR POSITIONS

Asst. Boys Soccer Coach @ BHHS Job #23-1096

Head Boys Basketball Coach @ BMS Job #23-1162


Asst. Girls Basketball Coach @ BHHS Job #23-1164

Asst Boys Basketball Coach @ TMS Job #23-1173

Asst Boys Basketball Coach @ THS

SYSTEMIZING AND MODERNIZING

- Adopted Informed K12 to automate, digitize forms to create efficient workflow
- HR processes such as New Hire paperwork are now done electronically
- Increased collaboration with payroll/finance department



Turnwater School District

JOB POSTING REQUEST

Position Title: _____ Location: _____
 Requesting Administrator: _____ Date: _____

1. Please Post: In-District Only Both In & Out of District For the _____ School Year.
 2. Work Schedule: School Year Only (Sep-June) Year-Round Seasonal/Temporary Other (See Notes)

3. Posting Trigger: New Position Vacancy:
 1. Individual vacating position: _____
 2. Reason (retire/resign/LOA): _____

4. Position Type: Continuing One Year Only Temporary Impact

5. Additional Questions:
 • Length of posting must be at least five (5) days. If more than five, indicate how many: _____
 Yes No
 • Will supplemental questions be needed to screen candidates? Yes No
 • Will First Aid/CPR certification be required for the successful candidate? Yes No

Certified Position Details:
 FTE: _____
 # of Hours per Day: _____ Start: _____ End: _____
 Hours of Work: _____

NOTES:

Reviewed by: _____ Date Received: _____
 — DISTRICT OFFICE USE ONLY —
 HR Representative _____

Account Code(s): _____ Paid Days/Yr: _____
 Budget Capacity? Y / N _____ Pay Range: _____
 Benefit Eligible? Y / N _____

HR Approval: Wendy Bromley, E.D. of Human Resources Date: _____
 Program Approval: _____ Program Approver (if applicable) Date: _____
 Fiscal Approval: _____ Melissa Richer, E.D. of Financial Services Date: _____

ADDITIONAL HR FACTS:

- Human Resources has processed 249 new employees for the 2023-2024 school year.
- TSD has 1004 employees currently
- TSD has 352 registered substitutes
- HR will have a new benefits coordinator next month



ACTION ITEMS

- 2nd Reading Policy 3205, Sexual Harassment of Students Prohibited: Questions can be directed to Shawn Batstone.
- Resolution 03-23-24 Uncollected Tax: Questions can be directed to Melissa Richter.
- Resolution 04-23-24 EP&O Levy: Questions can be directed to Melissa Richter.
- For and Against Levy Appointments: Questions can be directed to Superintendent Bogatin.

Revised

Tumwater School District Board Policy

SEXUAL HARASSMENT OF STUDENTS PROHIBITED

This district is committed to a positive and productive education free from discrimination, including sexual harassment. This commitment extends to all students involved in academic, educational, extracurricular, athletic, and other programs or activities of the school, whether that program or activity is in a school facility, on school transportation or at a class or school training held elsewhere.

Definitions

For purposes of this policy, sexual harassment means unwelcome conduct or communication of a sexual nature that constitutes sexual harassment under Title IX or Chapter 28A.6430 RCW. The term "sexual harassment" under this policy relates to certain legal definitions, which are described below. The district will refer to those legal definitions when responding to potential sexual harassment.

The district prohibits sexual harassment of students by other students, employees, or third parties involved in district activities. Sexual harassment can occur adult-to-student, can occur student-to-student, or can be carried out by a group of students or adults, and The district will respond to sexual harassment even if the alleged harasser is not a part of the school staff or student body. will be investigated by the District even if the alleged harasser is not a part of the school staff or student body. The district prohibits sexual harassment of students by other students, employees or third parties involved in school district activities.

Under federal and state law, Under Chapter 28A.640 RCW, the termthe term "sexual harassment" meansay include: unwelcome sexual advances, requests for sexual favors, sexually motivated physical contact, or other verbal or physical conduct or communication of a sexual nature if:

- Submission to that conduct or communication is made a term or condition, either explicitly or implicitly, of obtaining an education or employment.
 - Submission to or rejection of that conduct or communication by an individual is used as a factor in decisions affecting that individual's education or employment.
 - That conduct or communication has the purpose or effect of substantially interfering with an individual's educational or work performance, or of creating an intimidating, hostile, or offensive education or work environment.
-
- acts of sexual violence;
 - unwelcome sexual or gender-directed conduct or communication that interferes with an individual's educational performance or creates an intimidating, hostile, or offensive environment;
 - unwelcome sexual advances;
 - unwelcome requests for sexual favors;

- ~~sexual demands when submission is a stated or implied condition of obtaining an educational benefit;~~
- ~~sexual demands where submission or rejection is a factor in an academic, or other school-related decision affecting an individual.~~

A “hostile environment” has been created for a student when sexual harassment is sufficiently serious to interfere with or limit the student’s ability to participate in or benefit from the school’s program. The more severe the conduct, the less need there is to demonstrate a repetitive series of incidents. In fact, a single or isolated incident of sexual harassment may create a hostile environment if the incident is sufficiently severe, violent, or egregious.

Under Title IX, the term “sexual harassment” means conduct on the basis of sex that satisfies one or more of the following:

- An employee of the district conditioning the provision of an aid, benefit, or service on an individual’s participation in unwelcome sexual conduct.
- Conduct that creates a “hostile environment,” meaning unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the education program or activity.
- “Sexual Assault,” as defined in 20 U.S.C. § 1092(f)(6)(A)(v); “dating violence,” as defined in 34 U.S.C. § 12291(a)(10); “domestic violence,” as defined in 34 U.S.C. § 12291(a)(8); or “stalking,” as defined in 34 U.S.C. § 12291(a)(30).

Investigation and District’s Response

If the district knows, or reasonably should know, ~~that about~~ sexual harassment, ~~has created a hostile environment,~~ it will promptly ~~investigate to determine what occurred and take (1) appropriate action to investigate, steps to resolve the situation.~~ If an investigation reveals that sexual harassment has created a hostile environment, the district will take prompt and (2) effective steps reasonably calculated to end ~~the sexual harassment,~~ eliminate ~~any the~~ hostile environment, prevent its recurrence, and ~~as appropriate,~~ remedy its effects ~~as appropriate.~~ ~~The district will take prompt, equitable and remedial action within its authority on reports, complaints and grievances alleging sexual harassment that come to the attention of the district, either formally or informally. The district will take these steps every time a complaint, alleging sexual harassment comes to the attention of the district, either formally or informally.~~

Allegations of criminal misconduct will be reported to law enforcement and suspected child abuse will be reported to law enforcement or Child Protective Services. Regardless of whether the misconduct is reported to law enforcement, school staff will promptly ~~respond to sexual harassment~~ investigate to determine what occurred and take appropriate steps to resolve the situation, to the extent that ~~the response such investigation~~ does not interfere with an ongoing criminal investigation. A criminal investigation does not relieve the district of its independent obligation to ~~investigate and resolve~~ respond to sexual harassment.

Engaging in sexual harassment will result in appropriate discipline or other appropriate sanctions against offending students, staff, or other third parties involved in school district activities. Anyone else who engages in sexual harassment on school property or at school activities will have their access to school property and activities restricted, as appropriate.

Retaliation and False Allegations

Retaliation against any person who makes or is a witness in a sexual harassment complaint is prohibited and will result in appropriate discipline. The district will take appropriate actions to protect involved persons from retaliation.

It is a violation of this policy to knowingly report false allegations of sexual harassment. Persons found to knowingly report or corroborate false allegations will be subject to appropriate discipline.

Staff Responsibilities

The superintendent will develop and implement formal and informal procedures for receiving, investigating, and resolving complaints or reports of sexual harassment. The procedures will include reasonable and prompt time-lines and delineate staff responsibilities under this policy.

Any school employee who witnesses sexual harassment or receives a report, informal complaint, or written complaint about sexual harassment is responsible for informing the district Title IX or Civil Rights Compliance Coordinator. All staff are also responsible for directing complainants to the formal complaint process.

Reports of discrimination and discriminatory harassment will be referred to the district's Title IX/Civil Rights Compliance Coordinator. Reports of disability discrimination or harassment will be referred to the district's Section 504 Coordinator.

District/school staff, including employees, contractors, and agents shall not will not provide a recommendation of employment for an employee, contractor, or agent that the district/school, or the individual acting on behalf of the district/school, knows or has probable cause to believe, has engaged in sexual misconduct with a student or minor in violation of the law.

Notice and Training

The superintendent will develop procedures to provide age-appropriate information and education to district staff, students, parents/guardians, and volunteers regarding this policy and the recognition and prevention of sexual harassment. At a minimum, sexual harassment recognition and prevention and the elements of this policy will be included in staff, student and regular volunteer orientation. This policy and the procedure, which includes the complaint process, will be posted in each district building in a place available to staff, students, parents/guardians, volunteers, and visitors. Information about the policy and procedure will be clearly stated and conspicuously posted throughout each school building, provided to each employee, and reproduced in each student, staff, volunteer, and parent handbook. Such notices will identify the District's Title IX eCoordinator and provide contact information, including the eCoordinator's email address.

Policy Review

The superintendent will make [an annuala triennial \(every three years\)](#) report to the board reviewing the use and efficacy of this policy and related procedures. Recommendations for changes to this policy, if applicable, will be included in the report. The superintendent is encouraged to involve staff, students, volunteers and parents/[guardians](#) in the review process.

- Cross References:
- 3207 - Prohibition of Harassment, Intimidation and Bullying
 - 3210 - Nondiscrimination
 - 3211 - ~~Transgender Students~~ **Gender Inclusive Schools**
 - ~~3240 – Student Conduct Expectations and Reasonable Sanctions~~
 - 3241 - Classroom Management, Discipline and Corrective Action
 - 5010 - Nondiscrimination and Affirmative Action
 - 5011 - Sexual Harassment of District Staff Prohibited
- Legal References:
- 20 U.S.C. [§§ 1681 et seq. 1681-1688](#)
 - [34 C.F.R. Part 106](#)
 - WAC 392-190-058 Sexual harassment
 - RCW 28A.640.020 Regulations, guidelines to eliminate discrimination — Scope — Sexual harassment policies
- Management Resources:
- 2020 – August Issue**
 - 2015 - July Policy Alert
 - 2014 - December Issue
 - 2010 - October Issue

ADOPTION DATE: March 8, 2018

current

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Under federal and state law, the term "sexual harassment" may include:

- acts of sexual violence;
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- unwelcome sexual advances;
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 RCW 28A.640.020 Regulations, guidelines to eliminate discrimination — Scope — Sexual harassment policies
- Management Resources: 2015 - July Policy Alert
 2014 - December Issue
 2010 - October Issue

ADOPTION DATE: March 8, 2018

MEMO



TO: TSD BOARD OF DIRECTORS AND SUPERINTENDENT
FROM: Melissa Richter, Executive Director of Financial Services
DATE: November 3, 2023
RE: EP&O Levy Resolution and 2023 Refund Levy Resolution

The board will consider taking action on the following levy resolutions.

Education Programs and Operation (EP&O) Levy Resolution 04-23-24 - Proposition No. 1 is for a replacement levy asking that excess taxes be levied so long as the amount in any year does not exceed lawful limits. The taxes will provide funding for eligible educational programs and operations of the District.

	2025	2026	2027	2028
\$ 2.50	\$ 25,452,040.00	\$ 26,725,025.00	\$ 28,061,276.00	\$ 29,464,340.00
\$ 2.30	\$ 23,416,212.00	\$ 24,587,023.00	\$ 25,816,374.00	\$ 27,107,192.00
\$ 2.20	\$ 22,398,116.00	\$ 23,518,022.00	\$ 24,693,923.00	\$ 25,928,619.00

Certification of 2023 Excess Property Taxes Resolution 03-23-24 is to certify to the Thurston County Assessor the 2023 levy amounts to be collected in calendar year 2024.

Each year the Thurston County Treasurer's office sends a list of net refund levy amounts for taxes that have been canceled or supplemented in 2022-2023. They are the result of tax adjustments resulting from successful challenges to assessed value, technical errors in value, or granting exemptions.

According to RCW 84.69.180 the district has the option to adopt an annual refund levy resolution to recover these lost tax dollars.

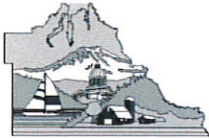
The amounts for the Tumwater School District are as follows:

- EP&O Levy \$148,542.87
- Capital Projects Levy \$41,656.81
- Bond \$95,345.64

After a review of the Debt Service fund, we've been advised to not take action with the bond refund.

In a meeting with DA Davidson, he noted that the community approved and passed an EP&O Levy at a rate of \$2.50 per \$1,000 of assessed value. Our most recent EP&O rate was \$2.11, significantly lower than the approved rate.

Adopting a resolution to recover these funds will have a minimal impact on the taxpayer rate. The district recommends passing the refund levy resolution for the EP&O and Capital Projects levy.



THURSTON COUNTY
WASHINGTON
NOVEMBER 1882

JEFF GADMAN
TREASURER

3000 Pacific Ave SE, Olympia, WA 98501-2043 • 360-786-5550 • FAX 360-754-4683
 Web: www.thurstoncountywa.gov/treasurer • Email: trsr@co.thurston.wa.us

October 10, 2023

TO: District Finance Personnel
 FROM: Jeff Gadman, Thurston County Treasurer
 RE: 2023 REFUND LEVY AMOUNTS

Listed below are the net refund levy amounts for taxes that have been cancelled or supplemented for the period 10/1/2022 to 9/30/2023. A zero amount indicates that more taxes were supplemented than cancelled for that levy.

According to RCW 84.69.180 you have the option to adopt an annual refund levy to recover these lost tax dollars. They are the result of tax adjustments resulting from successful challenges to assessed value, technical errors in value, or granting of exemptions.

My staff has prepared information below specific to your district that will assist you, should you decide to pursue the additional levy. We are providing this information to the County Assessor who you would work with, as you do with all levies. This additional levy amount, if applicable, can be included in your budget/levy certification you submit to the Assessor. If you have questions or concerns, or need help sharing this information with your authorizing body, please contact JJ Olson at 360-867-2243, jj.olson@co.thurston.wa.us or me at 360-786-5770, jeff.gadman@co.thurston.wa.us.

Here are the amounts for your district:

<u>District Name</u>	<u>Levy</u>	<u>Dollar Amount</u>
Tumwater School District #33	Enrichment	\$148,542.87
Tumwater School District #33	Capital Projects	\$41,656.81
Tumwater School District #33	Bond	\$95,345.64

TUMWATER SCHOOL DISTRICT NO. 33
THURSTON COUNTY, WASHINGTON

RESOLUTION NO. 03-23-24

CERTIFICATION OF 2024 EXCESS PROPERTY TAXES

A RESOLUTION of the Board of Directors of Tumwater School District No. 33, Thurston County, Washington, certifying to the Board of County Commissioners of Thurston County, Washington and the Superintendent of Capital Region Educational Service District 113, the amount of excess property taxes and refund levies to be levied in year 2023 and collected in year 2024 for the District's General Fund, Debt Service Fund and Capital Projects Fund; and providing for related matters.

BE IT RESOLVED BY THE BOARD OF DIRECTORS OF TUMWATER SCHOOL DISTRICT NO. 33, THURSTON COUNTY, WASHINGTON, as follows:

Section 1. Findings and Determinations. The Board of Directors (the "Board") of Tumwater School District No. 33, Thurston County, Washington (the "District") takes note of the following facts and makes the following findings and determinations:

(a) By Resolution No. 01-23-24, the Board adopted a budget for Fiscal Year 2023-24 (the "2023-24 Budget") that included certified General Fund educational programs and operations excess property taxes in the amount of \$20,500,000 to be levied in 2023 and collected in 2024.

(b) The 2023-24 Budget also included certified Debt Service Fund excess property taxes to pay debt service on all of the District's outstanding unlimited tax general obligation bonds in the amount of \$12,000,000 to be levied in 2023 and collected in 2024.

(c) The 2023-24 Budget also included certified Capital Projects Fund excess property taxes in the amount of \$5,925,000 to be levied in 2023 and collected in 2024.

(d) Pursuant to RCW 84.69.180, the District is authorized to recover levy funds not collected between October 1, 2022 and September 30, 2023 due to tax refunds, abatements or cancellations, and these uncollected levy funds to be levied in 2023 for collection in 2024 amount to \$148,542.87 for the General Fund educational programs and operations excess property tax levy and \$41,656.81 for the District's Capital Projects Fund excess property tax levy.

Section 2. Certification of General Fund Excess Property Tax Levy. Pursuant to RCW 84.52.020, the Board certifies to the Board of County Commissioners of Thurston County, Washington ("Board of Thurston County Commissioners") and the Superintendent of Capital Region Educational Service District 113 ("ESD 113 Superintendent") an excess property tax levy in the amount of \$20,500,000 to be levied in calendar year 2023 and collected in calendar year 2024 for the District's General Fund.

Section 3. Certification of Debt Service Fund Excess Property Tax Levy. Pursuant to RCW 84.52.020, the Board certifies to the Board of Thurston County Commissioners and the

ESD 113 Superintendent an excess property tax levy in the amount of \$12,000,000 to be levied in calendar year 2023 and collected in calendar year 2024 for the District's Debt Service Fund.

Section 4. Certification of Capital Projects Fund Excess Property Tax Levy. Pursuant to RCW 84.52.020, the Board certifies to the Board of Thurston County Commissioners and the ESD 113 Superintendent an excess property tax levy in the amount of \$5,925,000 to be levied in calendar year 2023 and collected in calendar year 2024 for the District's Capital Projects Fund.

Section 5. Administrative Refund Levy. Pursuant to RCW 84.69.180, the Board certifies to the Board of Thurston County Commissioners and the ESD 113 Superintendent the following administrative refund levies to be levied in calendar year 2023 and collected in calendar year 2024: \$148,542.87 for the General Fund and \$41,656.81 for the District's Capital Projects Fund.

Section 6. Execution; General Authorization and Ratification. This resolution may be executed by the Directors being present and voting in favor of the resolution, or only the President of the Board (the "President"), and attested by the Secretary to the Board (the "Secretary"), in tangible medium, manual, facsimile or electronic form under any security procedure or platform, and notwithstanding any other District resolution, rule, policy or procedure, or in any other manner evidencing its adoption. The Secretary, the President, the District's Executive Director of Financial Services and other appropriate officers of the District are hereby further severally authorized and directed to take such actions and to create, accept, execute, send, use and rely upon such tangible medium, manual, facsimile or electronic documents, records and signatures under any security procedure or platform, and notwithstanding any other District resolution, rule, policy or procedure, as in their judgment may be necessary or desirable to effectuate the provisions of this resolution. All actions taken prior to the effective date of this resolution in furtherance of and not inconsistent with the provisions of this resolution are ratified and confirmed in all respects.

[remainder of page intentionally left blank]

Section 7. Effective Date. This resolution takes effect from and after its adoption.

ADOPTED by the Board of Directors of Tumwater School District No. 33, Thurston County, Washington, at a regular open public meeting held this 9th day of November, 2023.

TUMWATER SCHOOL DISTRICT NO. 33
THURSTON COUNTY, WASHINGTON

President and Director

Vice President and Director

Director

Director

Director

ATTEST:

Kevin Bogatin
Secretary to the Board of Directors



621 Linwood Avenue SW Tumwater, WA 98512-6847
360) 709-7000 www.tumwater.k12.wa.us

In accordance with RCW 84.52.020, I, Melissa Richter, Executive Director of Financial Services, for Tumwater School District No. 33, do hereby certify to the Thurston County legislative authority that the Tumwater School District Board of Directors of said district requests that the following levy amounts be collected in 2024 as provided in the district's budget, which was adopted following a public hearing held on 08/24/2023:

Excess Levy:	Enrichment Levy	\$20,500,000.00
	<u>Enrichment Refund Levy</u>	<u>\$ 148,542.87</u>
	Total Enrichment Levy	\$20,648,542.87

	Capital Facility Levy	\$ 5,925,000.00
	<u>Capital Facility Refund Levy</u>	<u>\$ 41,656.81</u>
	Total Capital Facility Levy	\$ 5,966,656.81

Signature: _____

Date: _____

Submit this document to the Thurston County Commissioner's Office on or before November 30 of the year preceding the year in which the levy amounts are to be collected and forward a copy to the assessor.

TUMWATER SCHOOL DISTRICT NO. 33
THURSTON COUNTY, WASHINGTON

PROPOSITION NO. 1 - REPLACEMENT EDUCATIONAL PROGRAMS AND
OPERATIONS LEVY

RESOLUTION NO. 04-23-24

A RESOLUTION of the Board of Directors of Tumwater School District No. 33, Thurston County, Washington, providing for the submission to the voters of the District at a special election to be held on February 13, 2024, of a proposition authorizing an excess tax levy to be made annually for four years commencing in 2024 for collection in 2025 of \$ _____, in 2025 for collection in 2026 of \$ _____, in 2026 for collection in 2027 of \$ _____, and in 2027 for collection in 2028 of \$ _____, for the District's General Fund to pay expenses of educational programs and operations; designating the District's Executive Director of Financial Services and special counsel to receive notice of the ballot title from the Auditor of Thurston County, Washington; requesting and authorizing participation in the Local Voters' Pamphlet; and providing for related matters.

ADOPTED: November 9, 2023

This document prepared by:

*FOSTER GARVEY P.C.
1111 Third Avenue, Suite 3000
Seattle, Washington 98101
(206) 447-6264*

TUMWATER SCHOOL DISTRICT NO. 33
THURSTON COUNTY, WASHINGTON

RESOLUTION NO. 04-23-24

A RESOLUTION of the Board of Directors of Tumwater School District No. 33, Thurston County, Washington, providing for the submission to the voters of the District at a special election to be held on February 13, 2024, of a proposition authorizing an excess tax levy to be made annually for four years commencing in 2024 for collection in 2025 of \$_____, in 2025 for collection in 2026 of \$_____, in 2026 for collection in 2027 of \$_____, and in 2027 for collection in 2028 of \$_____, for the District's General Fund to pay expenses of educational programs and operations; designating the District's Executive Director of Financial Services and special counsel to receive notice of the ballot title from the Auditor of Thurston County, Washington; requesting and authorizing participation in the Local Voters' Pamphlet; and providing for related matters.

BE IT RESOLVED BY THE BOARD OF DIRECTORS OF TUMWATER SCHOOL DISTRICT NO. 33, THURSTON COUNTY, WASHINGTON, as follows:

Section 1. Findings and Determinations. The Board of Directors (the "Board") of Tumwater School District No. 33, Thurston County, Washington (the "District"), takes note of the following facts and makes the following findings and determinations:

(a) Calendar year 2024 is the last year of collection of the District's current four-year General Fund educational programs and operations tax levy, which was authorized pursuant to Resolution No. 02-19-20, adopted by the Board on November 14, 2019, and approved by the voters at a special election held and conducted within the District on February 11, 2020.

(b) With the expiration of the District's current four-year General Fund educational programs and operations tax levy, it appears certain that the money in the District's General Fund for the school years 2024-2025, 2025-2026, 2026-2027, 2027-2028 and 2028-2029 will be insufficient to permit the District to meet the educational needs of its students and pay expenses of educational programs and operations not funded by the State of Washington ("State"), all as more particularly set forth in Section 3 of this resolution, during such school years, and that it is necessary that a replacement excess tax levy of \$_____ be made in 2024 for collection in 2025, \$_____ be made in 2025 for collection in 2026, \$_____ be made in 2026 for collection in 2027, and \$_____ be made in 2027 for collection in 2028 for the District's General Fund to provide the money required to meet those expenses.

(c) The District's proposed four-year General Fund educational programs and operations tax levy authorized in this resolution provides for approximately the same educational programs and operations purposes as the District's expiring four-year General Fund educational programs and operations tax levy.

(d) Pursuant to Article VII, Section 2(a) of the Washington Constitution and Revised Code of Washington ("RCW") 84.52.053, the District may submit to its voters at a special election,

for their approval or rejection, a proposition authorizing the District to levy annual excess property taxes for support of (*i.e.*, to pay) educational programs and operations expenses.

(e) The District has received or, prior to the time the ballot proposition authorized in this resolution is submitted to the voters, the District will have received approval of its educational programs and operations tax levy expenditure plan from the Office of the Superintendent of Public Instruction under RCW 28A.505.240 as required by RCW 84.52.053(4), a copy of which is or will be on file with the District.

Section 2. Calling of Election. The Auditor of Thurston County, Washington, as *ex officio* Supervisor of Elections (the "Auditor"), is requested to call and conduct a special election in the manner provided by law to be held in the District on February 13, 2024, for the purpose of submitting to the District's voters, for their approval or rejection, the proposition authorizing a replacement General Fund educational programs and operations tax levy on all of the taxable property within the District (the assessed value of such representing 100% of true and fair value unless specifically provided otherwise by law) to be made annually for four years commencing in 2024 for collection in 2025 of \$ _____, the estimated dollar rate of tax levy required to produce such an amount being \$ _____ per \$1,000 of assessed value, in 2025 for collection in 2026 of \$ _____, the estimated dollar rate of tax levy required to produce such an amount being \$ _____ per \$1,000 of assessed value, in 2026 for collection in 2027 of \$ _____, the estimated dollar rate of tax levy required to produce such an amount being \$ _____ per \$1,000 of assessed value, and in 2027 for collection in 2028 of \$ _____, the estimated dollar rate of tax levy required to produce such an amount being \$ _____ per \$1,000 of assessed value, all in excess of the maximum tax levy allowed by law for school districts without voter approval. The exact tax levy rate and amount to be collected may be adjusted based upon the actual assessed value of the taxable property within the District and the limitations imposed by law at the time of the levy.

Section 3. Use of Taxes. If the proposition authorized by this resolution is approved by the requisite number of voters, the District will be authorized to levy the excess property taxes up to the amounts provided in this resolution to meet the educational needs of its students and pay expenses of educational programs and operations not funded by the State (including, but not limited to: special education, nurses, counselors, safety staff, graduation readiness, career/technical, athletics, and extracurricular activities) during the school years 2024-2025, 2025-2026, 2026-2027, 2027-2028 and 2028-2029, all as may be authorized by law and determined necessary by the Board. Pending the receipt of those taxes, the District may issue short-term obligations pursuant to chapter 39.50 RCW or contract indebtedness pursuant to RCW 28A.530.080. Upon receipt, the District may use those taxes to repay such short-term obligations or indebtedness, all as may be authorized by law and determined necessary and advisable by the Board.

[Remainder of page intentionally left blank]

Section 4. Form of Ballot Title. Pursuant to RCW 29A.36.071, the Thurston County Prosecuting Attorney is requested to prepare the concise description of the aforesaid proposition for the ballot title in substantially the following form:

PROPOSITION NO. 1

TUMWATER SCHOOL DISTRICT NO. 33

REPLACEMENT EDUCATIONAL PROGRAMS AND OPERATIONS LEVY

The Board of Directors of Tumwater School District No. 33 adopted Resolution No. 04-23-24, authorizing a replacement levy to continue support for educational programs. This proposition would authorize the District to levy the following excess taxes, replacing an expiring levy, on all taxable property within the District, for educational programs and operations not fully funded by the State (including special education, nurses, counselors, safety staff, graduation readiness, career/technical, athletics, extracurricular activities):

<u>Collection Year</u>	<u>Estimated Levy Rate/\$1,000 Assessed Value</u>	<u>Maximum Levy Amount</u>
2025	\$ _____	\$ _____
2026	\$ _____	\$ _____
2027	\$ _____	\$ _____
2028	\$ _____	\$ _____

all as provided in Resolution No. _____. Should this proposition be approved?

LEVY . . . YES

LEVY . . . NO

Section 5. Authorization to Deliver Resolution to Auditor and Perform Other Necessary Duties. The Secretary to the Board (the “Secretary”) or the Secretary’s designee is authorized and directed to: (a) present a certified copy of this resolution to the Auditor no later than December 15, 2023; and (b) perform such other duties as are necessary or required by law to submit to the District’s voters at the aforesaid special election, for their approval or rejection, the proposition authorizing the District to levy excess property taxes for support of educational programs and operations expenses.

Section 6. Notices Relating to Ballot Title. For purposes of receiving notice of the exact language of the ballot title required by RCW 29A.36.080, the Board hereby designates (a) the District’s Executive Director of Financial Services (Melissa Richter), telephone: 360.709.7011; email: melissa.richter@tumwater.k12.wa.us; and (b) special counsel, Foster Garvey P.C. (Lee Marchisio), telephone: 206.447.6264; email: lee.marchisio@foster.com as the individuals to whom the Auditor shall provide such notice. The Secretary is authorized to approve changes to the ballot title, if any, determined necessary by the Auditor or the Thurston County Prosecuting Attorney.

Section 7. Execution; General Authorization and Ratification. This resolution may be executed by the Directors being present and voting in favor of the resolution, or only the President of the Board (the "President"), and attested by the Secretary, in tangible medium, manual, facsimile or electronic form under any security procedure or platform, and notwithstanding any other District resolution, rule, policy or procedure, or in any other manner evidencing its adoption. The Secretary, the District's Executive Director of Financial Services, the President, and the District's special counsel, Foster Garvey P.C., are hereby further severally authorized and directed to take such actions and to create, accept, execute, send, use and rely upon such tangible medium, manual, facsimile or electronic documents, records and signatures under any security procedure or platform, and notwithstanding any other District resolution, rule, policy or procedure, as in their judgment may be necessary or desirable to effectuate the provisions of this resolution. All actions taken prior to the effective date of this resolution in furtherance of and not inconsistent with the provisions of this resolution are ratified and confirmed in all respects.

Section 8. Severability. If any provision of this resolution is declared by any court of competent jurisdiction to be invalid, then such provision shall be null and void and shall be separable from the remaining provisions of this resolution and shall in no way affect the validity of the other provisions of this resolution, or of the levy or collection of excess property taxes authorized herein.

Section 9. Effective Date. This resolution takes effect from and after its adoption.

ADOPTED by the Board of Directors of Tumwater School District No. 33, Thurston County, Washington, at a regular open public meeting held this 9th day of November, 2023.

TUMWATER SCHOOL DISTRICT NO. 33
THURSTON COUNTY, WASHINGTON

President and Director

Vice President and Director

Director

Director

Director

ATTEST:

KEVIN BOGATIN
Secretary to the Board of Directors

CERTIFICATION

I, KEVIN BOGATIN, Secretary to the Board of Directors of Tumwater School District No. 33, Thurston County, Washington (the "District"), hereby certify as follows:

1. The foregoing Resolution No. 04-23-24 (the "Resolution") is a full, true and correct copy of the Resolution duly adopted at a regular meeting of the Board of Directors of the District (the "Board") held at its regular meeting place on November 9, 2023 (the "Meeting"), as that Resolution appears in the records of the District, and the Resolution is now in full force and effect; and

2. The Meeting was duly convened, held and included an opportunity for public comment, in all respects in accordance with law, a quorum of the members of the Board was present throughout the Meeting, and a sufficient number of members of the Board present voted in the proper manner for the adoption of the Resolution.

IN WITNESS WHEREOF, I have hereunto set my hand this 9th day of November, 2023.

TUMWATER SCHOOL DISTRICT NO. 33
THURSTON COUNTY, WASHINGTON

KEVIN BOGATIN
Secretary to the Board of Directors



Tumwater School District
September 14, 2023

Cory Plager
Managing Director
cplager@dadco.com
(509) 462-6370



D | A | DAVIDSON
D.A. Davidson & Co. member SIPC

Levy and Bond Overview

- Educational Programs and Operations Levy (1 to 4 years)
 - *Existing Levy Expires in 2024*
- Capital Projects Levy (1 to 6 years)
- Transportation Vehicle Levy (1 to 2 years)
- Bonds (varies, but 20 years most common)

Source: RCW 84.52

Levy and Bond Overview

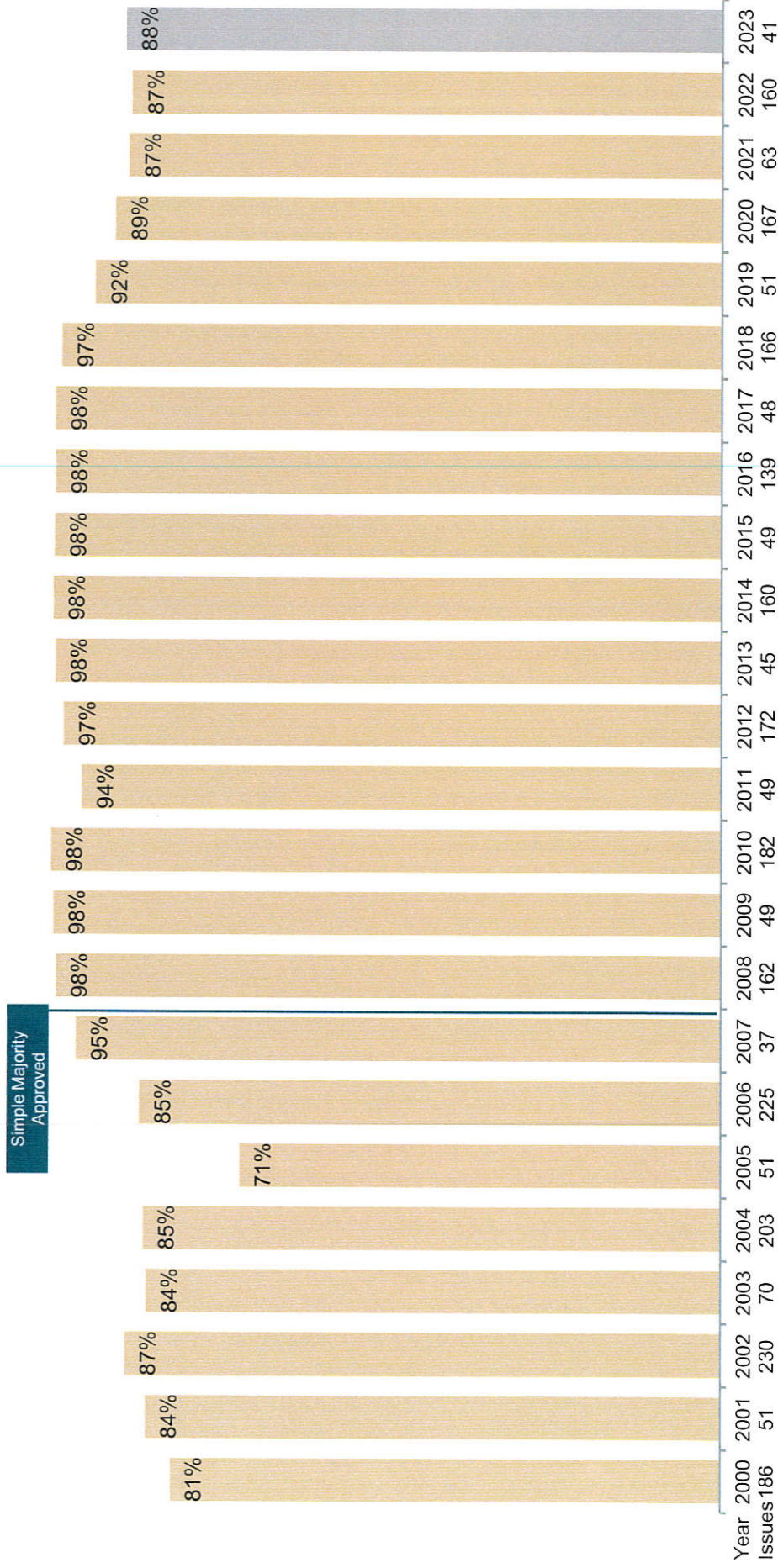
Education Programs and Operations Levies “EP&O”

- Defined as “Enrichment” of programs outside of the legislative definition of basic education, yet still used for many basic education functions
- Formerly known as “Maintenance and Operations Levy”
- Subject to levy lid laws:
 - Lessor of \$2.50/\$1,000 of assessed value or **\$2,500 per pupil (adjusted by inflation - \$2,988.32 in 2023)**
- Simple Majority – 50% +1 (GF, CPF, TVF)
- No validation requirement
- Based on the calendar year, not the school fiscal year
- May be attempted twice in a twelve-month period

Source: EHJR 4204, RCW 84.62.053

Levy and Bond Overview

EP&O Levy Success – Washington State



Source: State of Washington, Office of Superintendent of Public Instruction, County Elections

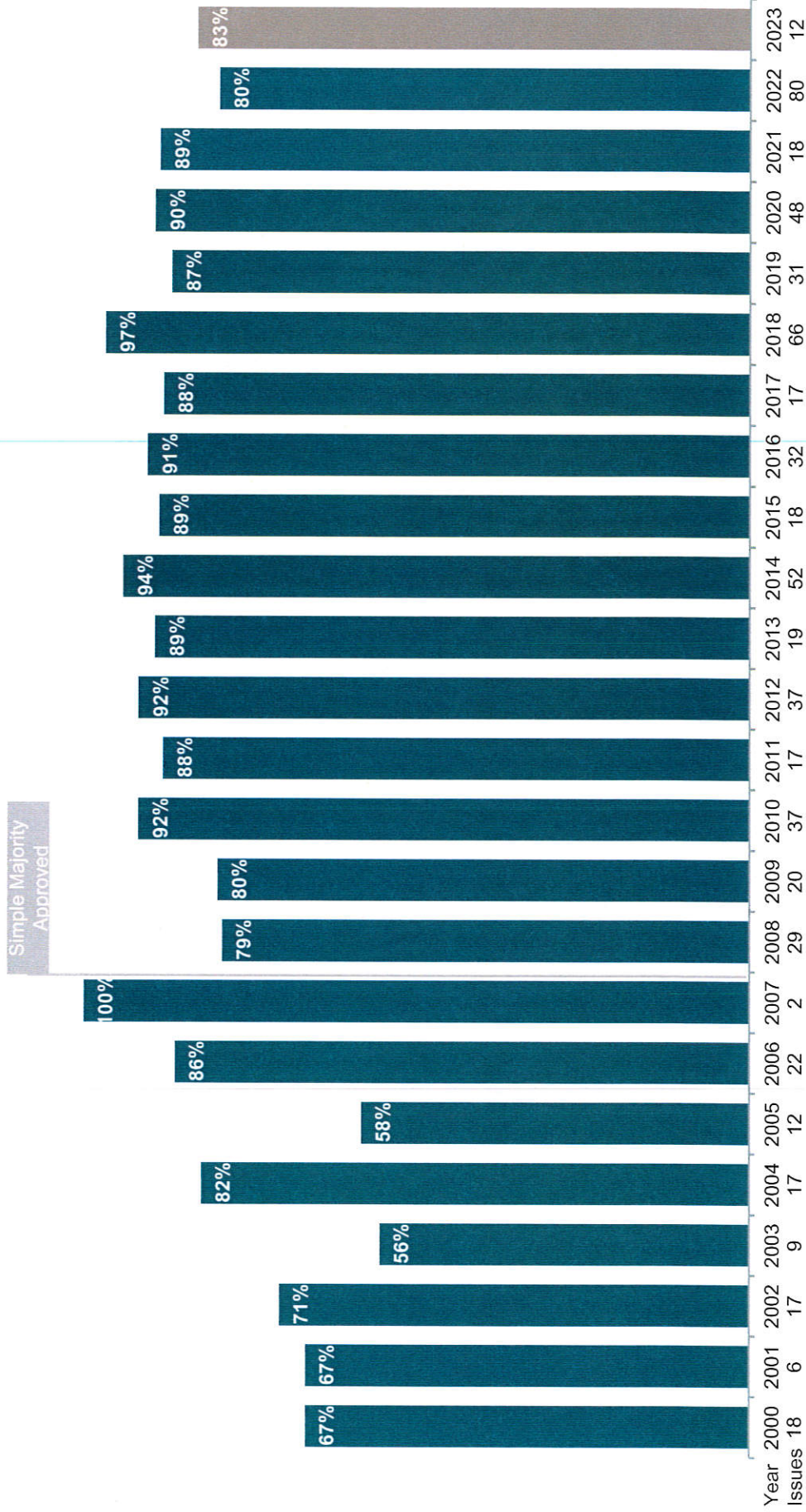
Levy and Bond Overview

Capital Projects Levy

- No dollar limit
- Simple majority
- Up to a six-year collection
- No interest cost
- Common uses: Technology, Safety, Security, Capital Improvements (Roof, HVAC, Parking Lots, etc.)
- Jump start a long-range capital plan

Levy and Bond Overview

Capital Project Levy Success – Washington State

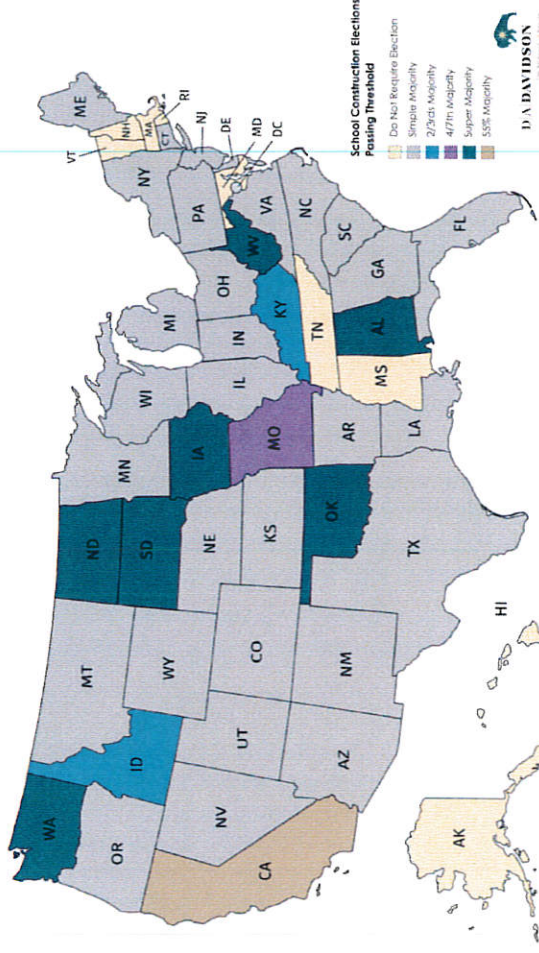


Source: State of Washington, Office of Superintendent of Public Instruction, County Elections

Levy and Bond Overview

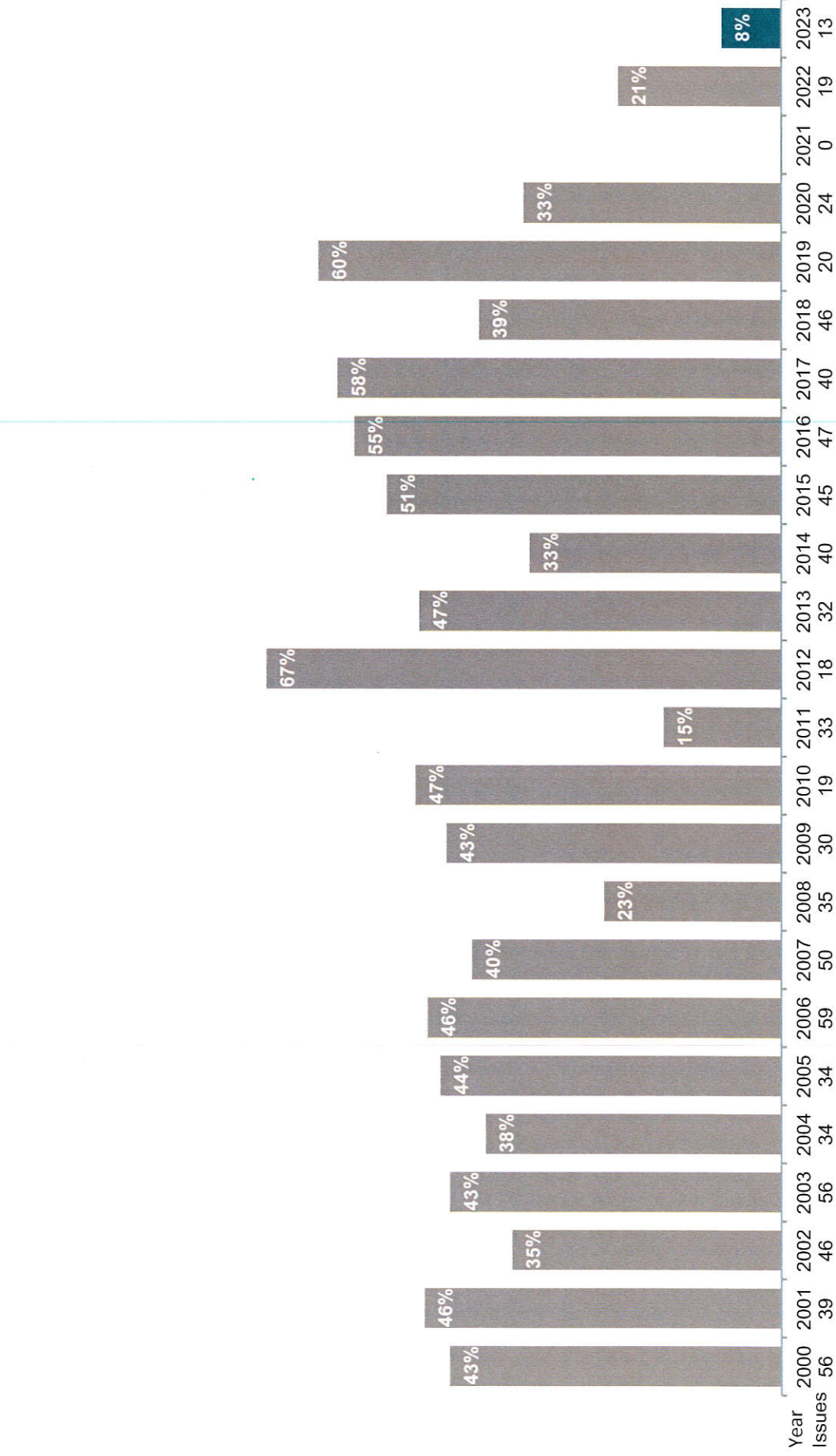
Unlimited Tax General Obligation Bonds – “UTGO”:

- Issued by local governments to finance capital projects
- 5% debt capacity
- Most bonds are tax-exempt
- Bond holders are repaid with property taxes
- Approved with a 60% yes vote
 - Results must be validated (40% of voters from previous General Election in November must vote)



Levy and Bond Overview

School Bond Success – Washington State

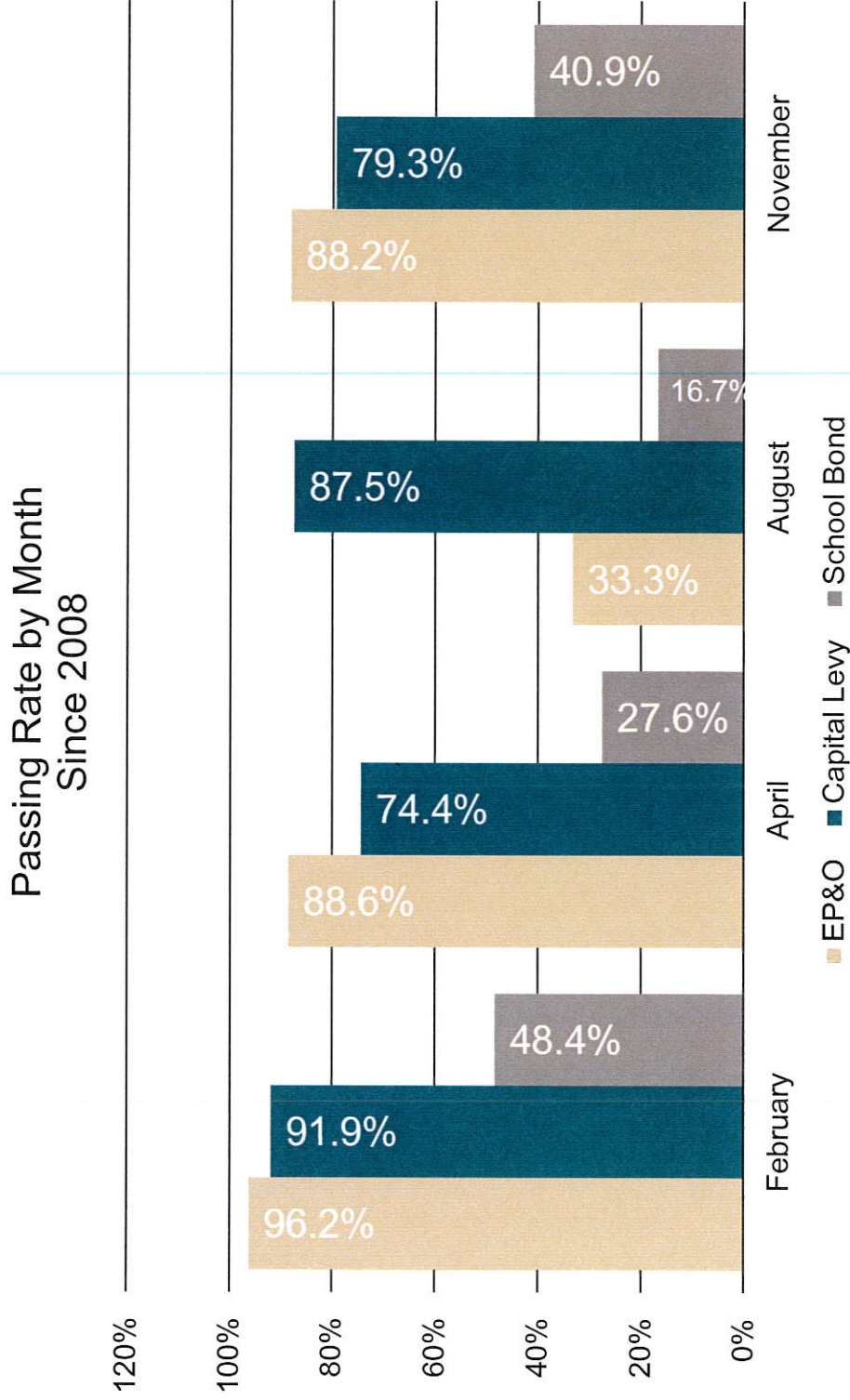


Source: State of Washington, Office of Superintendent of Public Instruction, County Elections



Levy and Bond Overview

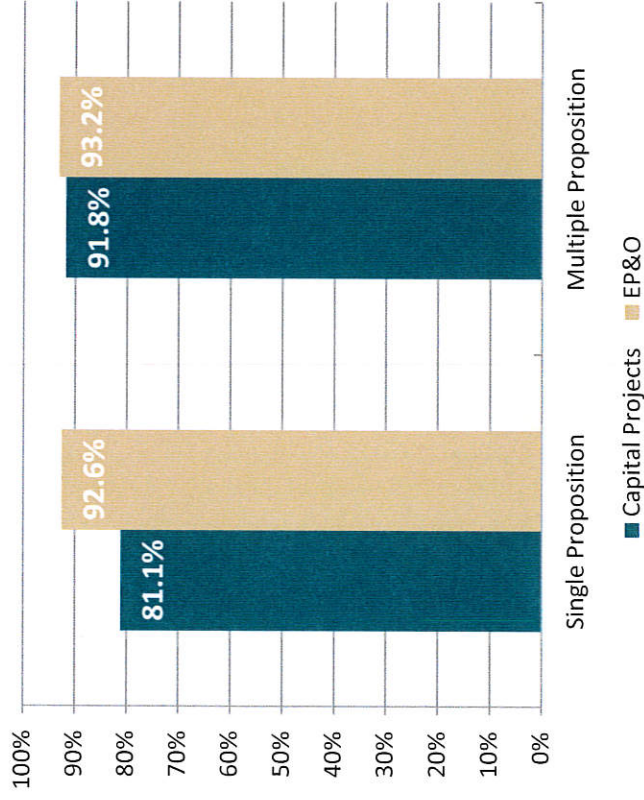
When is the best time to submit a proposition to the voters?



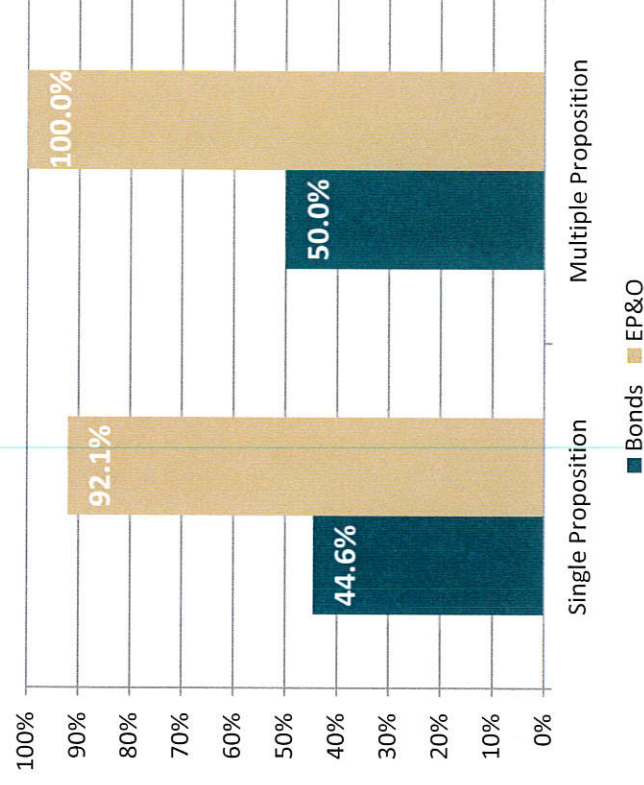
Levy and Bond Overview

Should I run a Capital Levy or Bond with my expiring EP&O Levy?

Multiple Propositions - Capital Projects (Since 2015)



Multiple Propositions - School Bonds (Since 2015)



2024 Special Election and Resolution Filing Dates

The 2024 special election dates and ballot resolution filing deadlines pursuant to the Revised Code of Washington (“RCW”) are listed below for your information.⁽¹⁾ These are the dates permitted under current law, which are subject to change by the Legislature.

ELECTION DATE	RESOLUTION FILING DEADLINE ⁽²⁾	APPROXIMATE DATE BALLOTS ARE MAILED ⁽³⁾	COUNTY CERTIFIES ELECTION RESULTS
February 13, 2024	December 15, 2023	January 26, 2024	February 23, 2024
April 23, 2024	February 23, 2024	April 5, 2024	May 3, 2024
August 6, 2024	May 3, 2024	July 19, 2024	August 20, 2024
November 5, 2024	August 6, 2024	October 18, 2024	November 26, 2024

(1) This data is for informational purposes only and does not take the place of local, state or federal laws. Specific RCW information can be found at: http://www.secstate.wa.gov/elections/election_laws.aspx.

(2) Some dates may have been adjusted to reflect the business day prior to actual resolution filing date, according to RCW 29A.04.330, if falling on a weekend.

(3) Applies to both mail and absentee ballots. Absentee ballots are required to be mailed no later than 18 days prior to the election date.

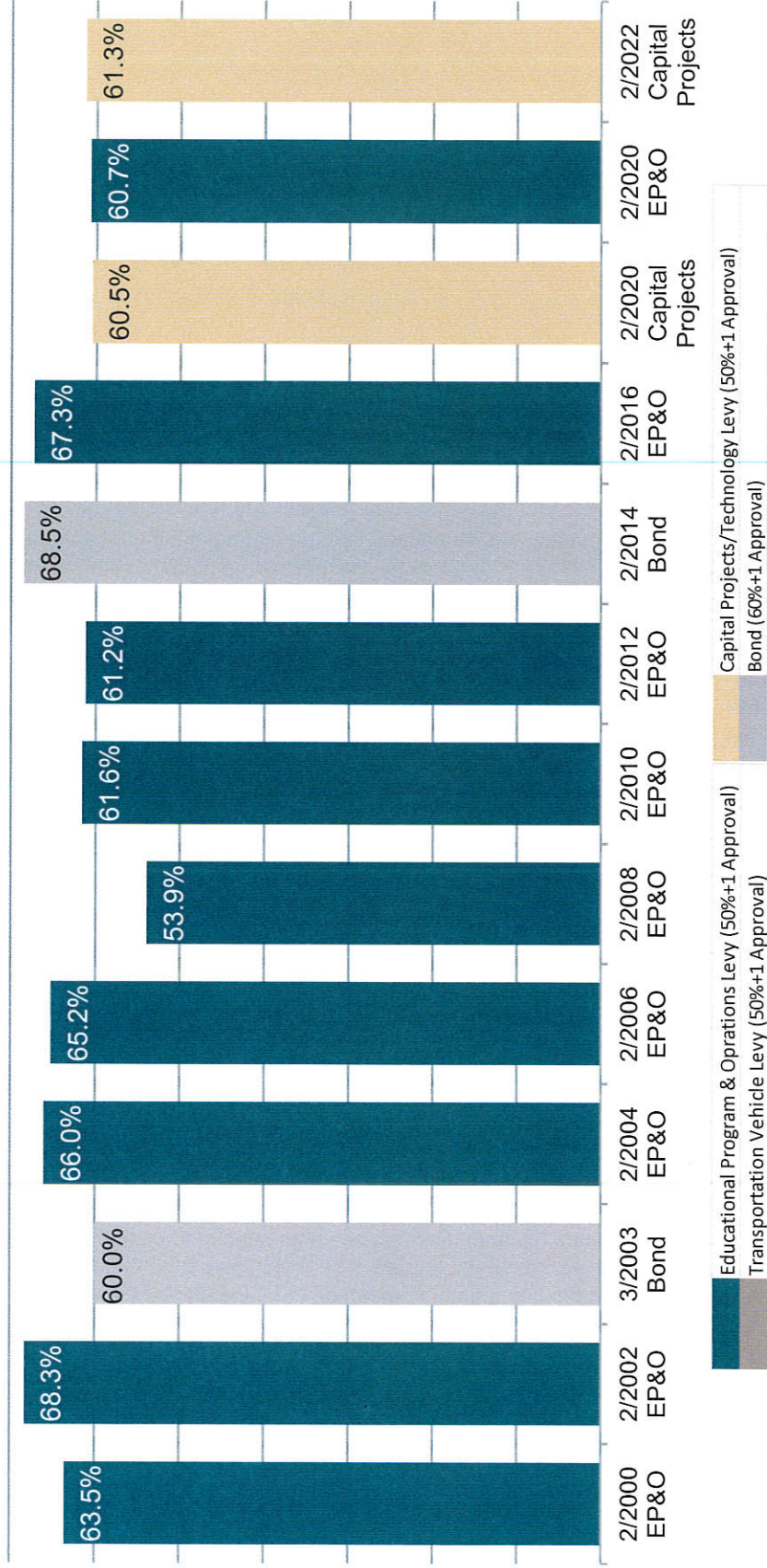
RCW 29A.40.070.

(4) ESB 5273 subject to change.

Source: *Washington Secretary of State’s Office, Elections and Voting website.*

Levy and Bond Overview

Tumwater School District Election Passage Rate History



Source: OSPI 1463-GF, 1463-BI

Property Values and School Taxes

Tumwater School District Bond Assessed Valuation

1.8% 2024 Preliminary
AV Growth

\$255 Million in Projected New
Construction (record high)

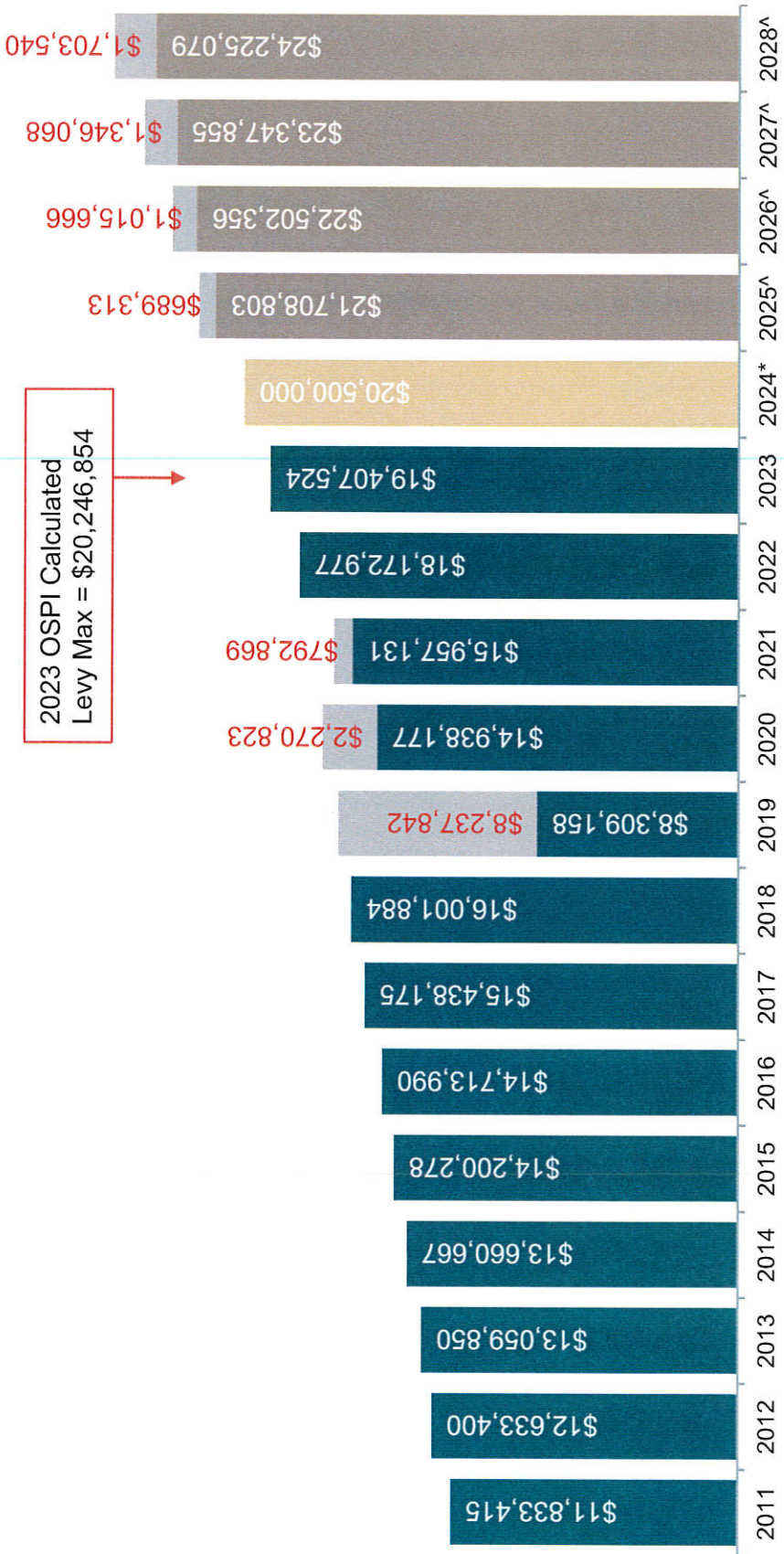
2023 Assessed Value
Increase 27.6%



Source: State of Washington, Office of Superintendent of Public Instruction, County Assessor Annual Report, *preliminary

Property Values and School Taxes

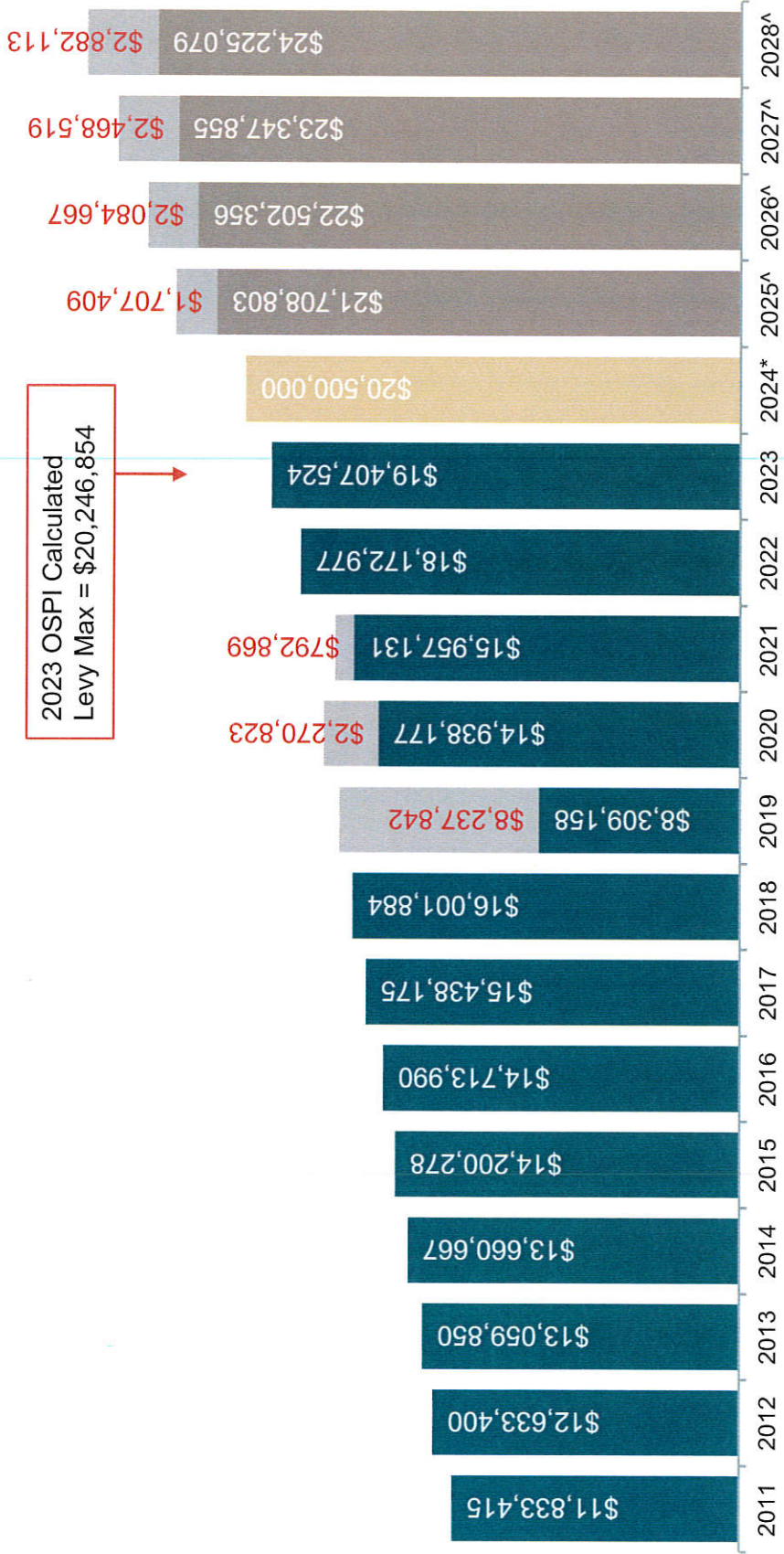
Tumwater School District EP&O Ballot Levy History and \$2.20 Projection – With Rollback



Source: OSPI 1463-GF, 1463-BI, County Assessor Annual Report and/or Sample Ballot. *2024 voter approved, ^proposed

Property Values and School Taxes

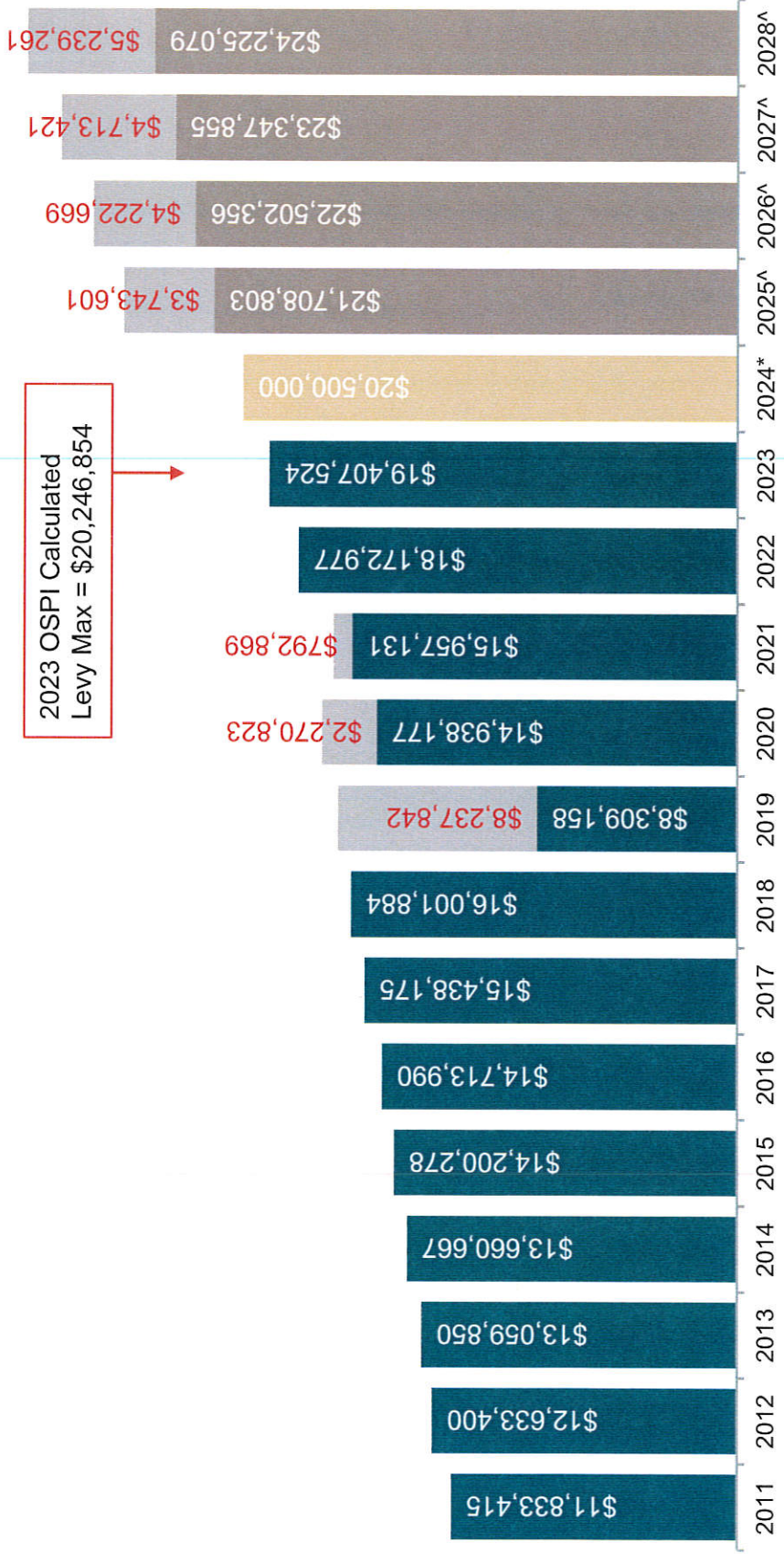
Tumwater School District EP&O Ballot Levy History and \$2.30 Projection— With Rollback



Source: OSPI 1463-GF, 1463-BI, County Assessor Annual Report and/or Sample Ballot. *2024 voter approved, *proposed

Property Values and School Taxes

Tumwater School District EP&O Ballot Levy History and \$2.50 Projection – With Rollback



Source: OSPI 1463-GF, 1463-BI, County Assessor Annual Report and/or Sample Ballot. *2024 voter approved, ¹proposed

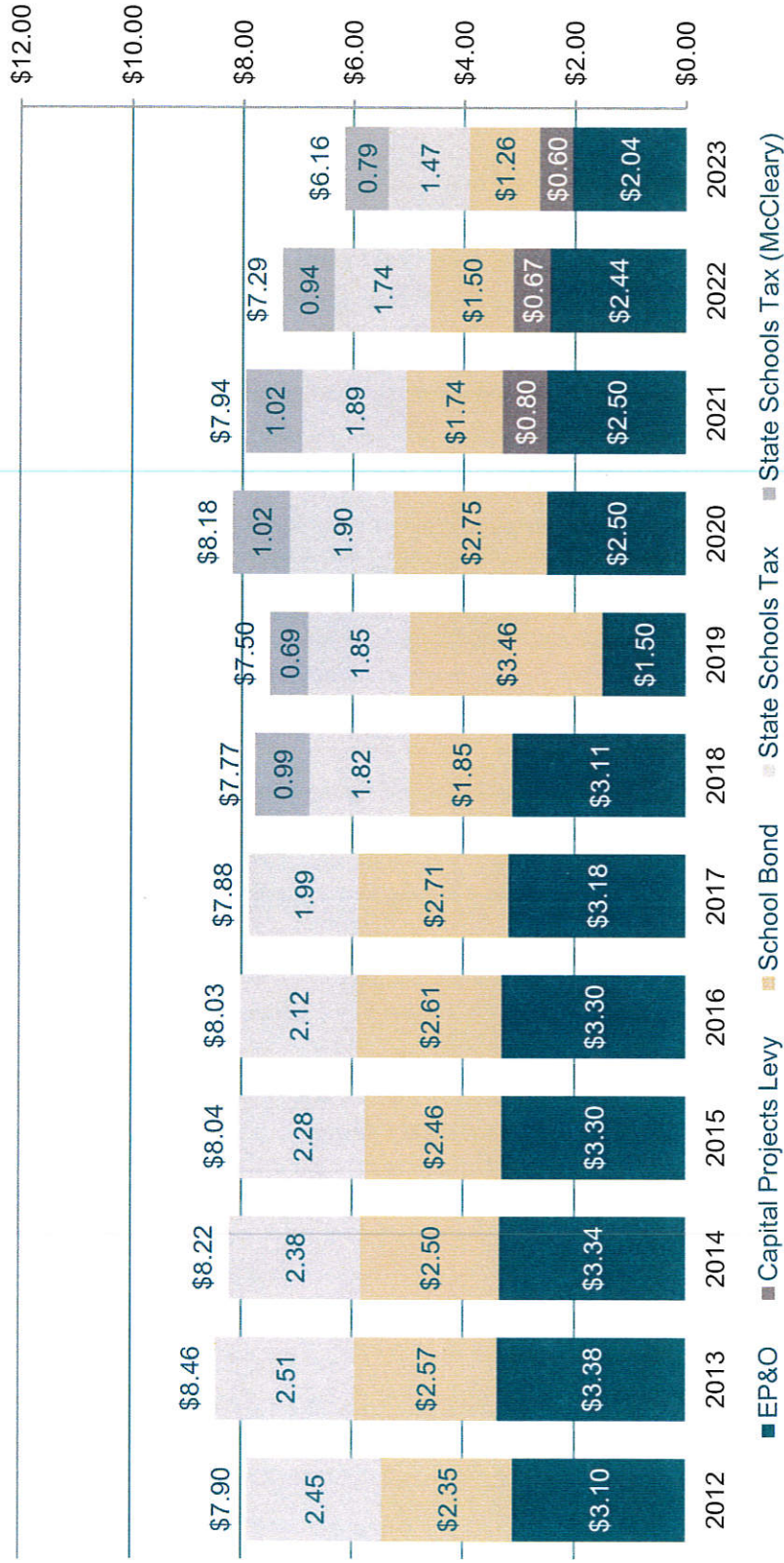
Property Values and School Taxes

Tumwater School District
Tax Rates/\$1,000



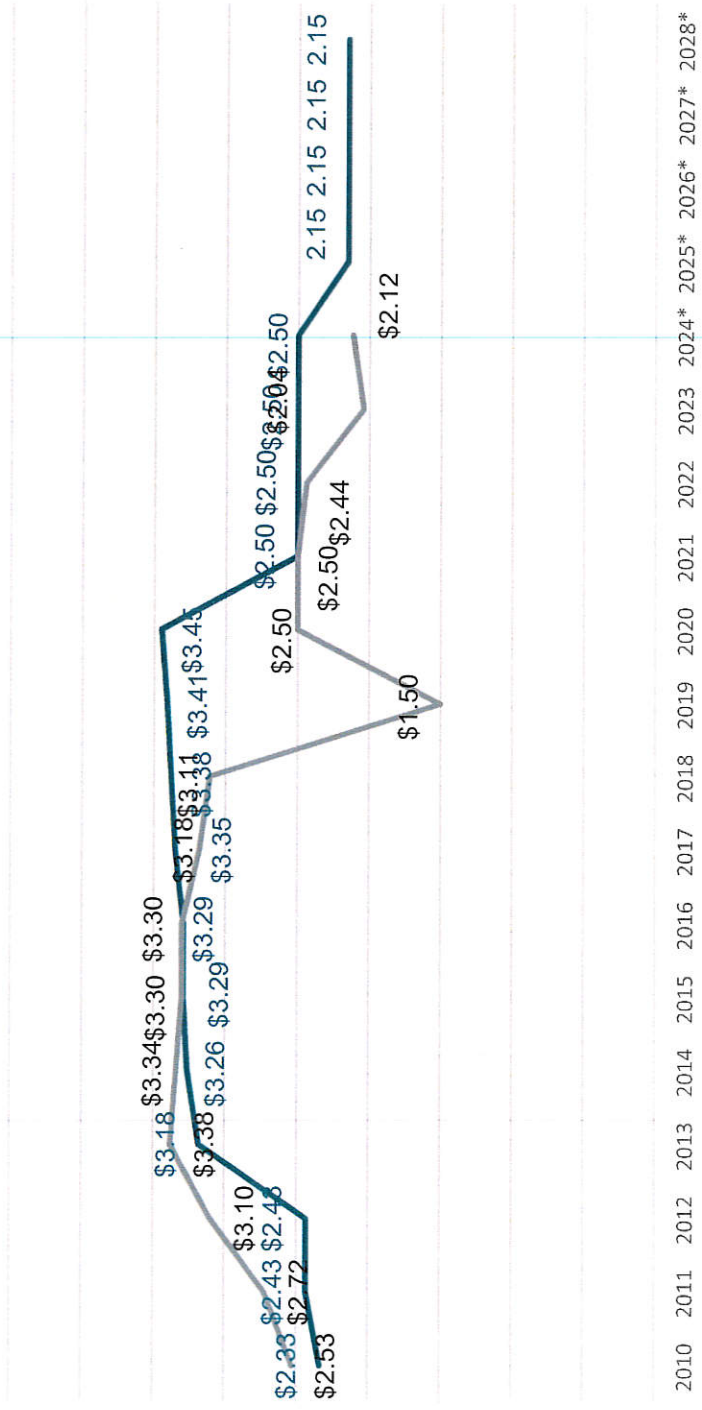
Property Values and School Taxes

Tumwater School District
Tax Rates/\$1,000 (w/ State Schools Tax)



Property Values and School Taxes

Tumwater School District
 EP&O Ballot Tax Rate vs. Actual Tax Rate



County Tax Rate Comparison

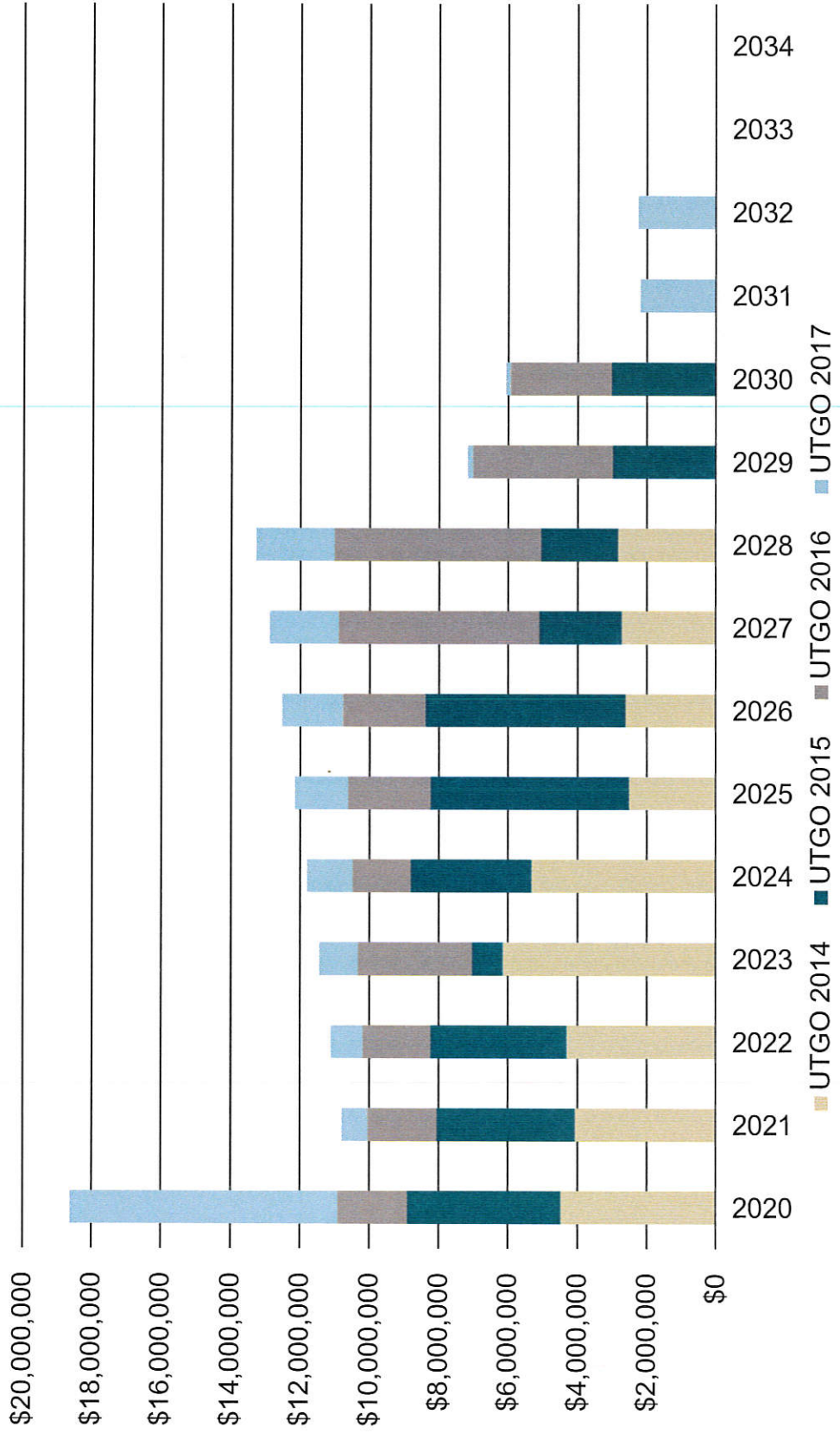
Thurston County School Districts 2023 Total Tax Rates ⁽¹⁾							
District	Assessed Value ⁽²⁾ (\$)	Bonds (\$)	M&O (\$)	Capital (\$)	Trans. (\$)	Total (\$)	
Centralia School District No. 401	\$ 90,599,335	1.0849	1.1133	-	-	2.1982	
Griffin School District No. 324	\$ 1,910,263,678	-	1.3127	0.3895	-	1.7022	
North Thurston School District No. 003	\$ 22,935,031,648	1.7975	1.9966	-	-	3.7941	
Olympia School District No. 111	\$ 15,281,548,008	1.2152	1.9279	0.7764	-	3.9195	
Rainier School District No. 307	\$ 972,363,916	0.7745	2.1339	-	-	2.9084	
Rochester School District No. 401	\$ 1,970,480,411	-	2.2058	-	-	2.2058	
Tenino School District No. 402	\$ 1,778,542,947	-	2.1526	0.9151	-	3.0677	
Tumwater School District No. 033	\$ 9,496,578,869	1.2626	2.0390	0.6016	-	3.9032	
Yelm School District No. 002	\$ 4,773,713,991	1.1474	2.0183	-	-	3.1657	

(1) 2023 Bond Assessed Value does not include TAV.

(2) Thurston County values only.

Debt Profile

(Principal and Interest Payments by Calendar Year)



Other Considerations

Tumwater SD is no longer eligible for Local Effort Assistance (Levy State Matching Funds):



On February 23rd, 2023, Moody's Investors Service downgraded Tumwater School District from Aa2 to Aa3. The downgrade was primarily as a response to lower fund balance/reserves.



D | A | DAVIDSON

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DA DAVIDSON OFFERS:

- Bond and Levy Planning
- Attend and Present at Facility/Community Meetings
- Market and Sell Bonds
- Long Range Capital Financing
- Credit Evaluation and Ratings Presentations
- Continuing Disclosure Compliance
- Annual Debt Service Fund Cash Flows
- Tax Rate Projections
- Budget Support and Notes to the Financials
- Arbitrage Rebate Support
- Monitor Potential Refunding Savings

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Required Disclosure Pursuant to MSRB Rule G-23: An underwriter's primary role will be to purchase as principal, or arrange for the placement of the securities in a commercial arm's length transaction with the issuer, and may have financial and other interests that differ from those of the issuer. In its capacity as underwriter and not as financial advisor, an underwriter may provide incidental financial advisory services at the issuer's request, including advice regarding the structure, timing, terms and other similar matters concerning the issuance. However, an underwriter does not assume any financial advisory or fiduciary responsibilities with respect to the issuer.



Tumwater School District

621 Linwood Avenue SW
Tumwater, WA 98512-6847
(360) 709-7000 www.tumwater.k12.wa.us

MEMORANDUM

Date: November 3, 2023
TO: School Board
FROM: Kevin Bogatin, Superintendent
RE: EP&O Levy For & Against Committee

Election regulations require that the district solicit citizens within its district boundary who want to participate in writing a “For” and “Against” Committee statement to appear in the official Thurston County Official Voters’ Pamphlet. Each committee shall consist of not more than three members; however, a committee may seek the advice of other persons.

The Pro Committee as a group will write a pro statement of up to 250 words and a 75-word rebuttal to the Con Committee statement. The Con Committee will write a 250-word statement in opposition to the ballot measure and a 75-word rebuttal to the Pro Committee’s statement. All must be residents of Thurston County.

The district posted an advertisement the week of October 30th for the “For” and “Against” committee and asked interested persons to submit an application to the district by noon on November 8, 2023.

The school board will be provided a list of names and their application for consideration on November 9th. The board may select up to three individuals for each committee.

You can learn more about the elections process here:
<https://www.thurstoncountywa.gov/departments/auditor/elections>

BOARD OF DIRECTORS

MELISSA BEARD DARBY KAIKKONEN SCOTT KILLOUGH CASEY TAYLOR JILL ADAMS

“Continuous Student Learning in a Caring, Engaging Environment”

BOARD COMMITTEE REPORTS

- Legislative Update: Questions can be directed to Vice President Beard.



Washington State School Directors' Association

WSSDA is a state agency comprised of the 1,477 locally elected school board directors who serve the state's 1.1 million students in their communities and statewide.

Putting Students First by Advocating for our Collective Priorities

Thank you to our legislators who advanced public education priorities during the 2023 legislative session, particularly by increasing special education funding and expanding access to school meals. We need your continued support to effectively serve our students, staff, and communities, especially when many districts are experiencing profound financial challenges.

We look forward to working with you to continue advancing the state's commitments to public education in the 2024 legislative session and beyond.



Provide for Ample, Equitable, and Stable Public Education

Amplify and equitably fund programs and staff based on student need to close opportunity and achievement gaps; advance supports for Career and Technical Education; maintain the Transition to Kindergarten program; close regionalization factor gaps between adjacent districts in line with the recommendations from the 2022 K-12 Basic Education Compensation Advisory Committee; and eliminate the differential access of school districts across the state to levy and levy equalization funding.



Advance Special Education

Fully fund the mandatory services for eligible students; remove the artificial cap; eliminate application penalties; recognize that costs vary for every district based on the uniqueness of each student and community; and expand access to inclusionary practices to improve student outcomes.



Build Safe and Healthy Schools

Safeguard the social, emotional, and physical safety of students and staff by updating the school construction formula; supporting a simple majority vote for school bonds; increasing access to the small school modernization grant program; expanding resources for relevant and essential staff training; and engaging students and parents in decision-making.



Transport and Feed Students

Help students and their families to have full access to basic education by updating the STARS formula so that all costs related to student transportation are covered, and by expanding the prospect for more students to receive school meals so they can learn successfully.

"Educational equity can only exist when a student's level of opportunity and achievement cannot be predicted based on race, characteristics, or circumstances. Therefore, we must identify and eliminate any discriminatory practices and prejudices within our state's public education system."

—WSSDA's member-adopted position on educational equity



For more information, go to wssda.org/priorities.

Two Bodies, One Democratic Process

Just as bills are introduced by locally elected legislators, WSSDA positions are introduced by locally elected school directors. The formal adoption for both follows the same democratic process. Here is a side-by-side comparison:

How a bill becomes a law in WA Legislature

State legislators are elected by a majority of voters within their legislative district

A legislator brings forward a bill to represent the interests of their constituents

The bill is assigned to a committee where there is discussion and may be amendments

To become law, the bill must ultimately go to a vote of the full legislative body

With a majority vote, the bill passes

The bill becomes law and citizens must follow that law based on the majority vote

Any law can be changed during a future legislative session following this process

How a proposal becomes a WSSDA position

Local school directors are elected by a majority of voters within their school district

A school board brings forward a proposal to represent the interests of their district and community

The proposal is assigned to a committee where there is discussion and may be amendments with the approval of the submitting school board

To become a position, the proposal must go to a vote of the full General Assembly (one voting delegate from each school district)

With a majority vote, the proposal passes

The position becomes a WSSDA position and WSSDA advocates according to its contents
However, nothing prohibits an individual district from advocating with legislators, contrary to the position passed by the majority at the General Assembly

Any position could be changed during a future General Assembly following this process