

Steve Spencer  
Superintendent

Rachel Alpert  
Assistant Superintendent

2023-2024  
Board of Directors

Ed Dressel

Lu Ann Meyer

Rob Ogilvie

Zach Steele

Jon Woods

Board Secretary  
Juli Lichtenberger

Please join us at our  
school board meetings.  
Unless otherwise  
scheduled the board  
meets the second and  
fourth Mondays  
of the month.

District Office  
Board Room  
6:30 p.m.

Mission Statement  
Dallas School District  
is centered on students,  
powered by  
collaboration, built on  
equity, and driven by  
excellence.

Dallas School District  
111 SW Ash Street  
Dallas OR 97338

503.623.5594 ph  
503.623.5597 fax

**Agenda**  
**Board Meeting**  
**February 12, 2024**  
**6:30 p.m.**

<https://dsd2-org.zoom.us/j/84855147461>  
**District Office Board Room**

- 1.0 Welcome/Pledge of Allegiance**
- 2.0 Approval of the Agenda**
- 3.0 Good News**
  - 3.1 LaCreole received a \$715.94 grant for yoga mats. A Yoga and Mindfulness for Mental Health project was funded through this grant from DonorsChoose.
  - 3.2 Congratulations to Jose Romero who took first place at the Resers Tournament of Champions!
  - 3.3 Lyle hosted OSU's Family Science & Engineering Night and had a great turnout.
- 4.0 Student Report – Rowan McDowell**
- 5.0 Public Comment**
- 6.0 Announcements**
  - 6.1 February Calendar 518
    - 6.1.1 Next Board Meeting Tuesday, February 27, 2024 at 4:15 p.m. following a Work Session at LaCreole Middle School at 3:00 p.m.
    - 6.1.2 Citizens Oversight Committee Meeting March 5, 2024 at 5:30 p.m.
    - 6.1.3 Finance Committee Meeting February 15, 2024 at 5:30 p.m.
- 7.0 Consent Agenda**
  - 7.1 Approval of the January 22, 2024 Board Minutes 519
  - 7.2 Staffing Report 523
- 8.0 Financial Report – Tami Montague 524**
- 9.0 Reports**
  - 9.1 2023 English Language Learner Legislative Report 527
  - 9.2 Enrollment Report 569
  - 9.3 Charter Schools Enrollment Reports 571
  - 9.4 Charter Schools Financial Reports 573
  - 9.5 Charter Schools Minutes and Agendas 579
- 10.0 Discussion Items**
  - 10.1 Board Self-Assessment

**11.0 Executive Session per ORS 192.660**

(2)(i) To Evaluate the Employment-Related Performance of District  
Personnel

**12.0 Adjourn**



## Public Participation in Board Meetings

During each school board meeting, the agenda has been set to include an item titled “public comment.” It is during this portion of the agenda the public can comment on any item that is or is not on the agenda.

Because of the nature of the Board’s work, it is typical that the Board will hear from a patron. Public participation is a time for the Board to listen, not a time for discussion or responding to questions, as the Board needs adequate time to process the information received to ensure proper steps are taken going forward. The Board may direct questions to district administrative staff to respond to after the meeting. If input is given related to an action item later in the agenda, the Board will use the input during their discussion or deliberation of that specific item. All public comment during a Board meeting is limited to 3 minutes for each individual. Up to 5 minutes may be granted to one person who represents a group of 3 or more with similar testimony. The Board Chairperson may adjust or extend allowable time limits, if necessary.

The Board cannot hear complaints about specific school personnel during an open meeting. If a patron has a specific complaint against district personnel, the board chair or the superintendent can direct the patron to the appropriate complaint process governed by board policy.

There are three ways to provide public comment at a Board meeting.

- 1) If you wish to address the Board in person during a Board meeting, please fill out the request for public comment form available outside the boardroom. If the meeting has started and you decide you would like to provide public comment, please alert the administrator who was the greeter or the board executive assistant with your request by simply handing them the public participation form. This will be directed to the board chair.
- 2) If you wish to address the Board remotely (via Zoom) during a Board meeting, please email Juli Lichtenberger, Executive Assistant to the Superintendent and Board, ([juli.lichtenberger@dsd2.org](mailto:juli.lichtenberger@dsd2.org)) at least two hours prior to the start of the meeting. Clearly label the subject line as “Public Comment”. In the email state that you would like to address the board remotely during the meeting, and include the topic.

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**Steve Spencer, Superintendent**

**Rachel Alpert, Assistant Superintendent**

Board of Directors: Ed Dressel • Lu Ann Meyer • Rob Ogilvie • Zach Steele • Jonathan Woods

- 3) If you wish to address the Board in hard copy or email please submit to Juli Lichtenberger, Executive Assistant to the Superintendent and Board, at [juli.lichtenberger@dsd2.org](mailto:juli.lichtenberger@dsd2.org) at least two hours prior to the start of the meeting. Clearly label the subject line or document as "Public Comment"

If you have questions about the district, we encourage you to contact our superintendent.

Thank you for your interest in Dallas School District.

All public meetings, assemblies and celebrations held by the Dallas School District 2 are required to be accessible to persons with disabilities under Title II of the Americans with Disabilities Act (ADA). Accommodations are available upon request to persons who require alternatively formatted materials or auxiliary aids to ensure effective communication and access to events. Please allow at least 10 business days to arrange for accommodations. All requests should be sent to:

DO Reception  
Dallas School District 2  
111 SW Ash Street  
Dallas, OR 97338  
503-623-5594

Or: e-mail [compliance.officer@dsd2.org](mailto:compliance.officer@dsd2.org)



# FEB 2024

SUN	MON	TUE	WED	THU	FRI	SAT
				01 Finance Committee Meeting 5:30 p.m.	02	03
04	05	06 Citizens Oversight Committee Meeting 5:30 p.m.	07	08	09	10
11	12 Board Meeting 6:30 p.m.	13	14	15 Finance Committee Meeting 5:30 p.m.	16 No School Inservice Day	17
18	19 No School Holiday	20 Technology Advisory Committee Meeting 3:00 p.m.	21	22	23	24
25	26	27 Board Work Session with LaCreole 3:00 p.m.  Board Meeting 4:15 p.m.	28	29		

### Minutes

**Work Session at Whitworth Elementary School – 2:45 p.m.**

**Board Meeting at District Office Board Room – 4:00 p.m.**

**January 22, 2024**

**<https://dsd2-org.zoom.us/j/84855147461>**

**Present:** Jon Woods, Lu Ann Meyer, Ed Dressel, Zach Steele, Steve Spencer, Juli Lichtenberger, Sean Johnson, Nick Ingalls, Darrick Bruns, Bob Archer

**Vistors:** Whitworth Staff, Kyle Diehm, Rich Slack, Spencer Jones

**Excused:** Rob Ogilvie

#### **Work Session with Whitworth Staff**

- **Introductions**
  - Darrick Bruns, Principal, welcomed the Board.
- **What are your successes, accomplishments or things that you are proud of this year?**
  - Working together during PLC time is going well
  - Field trips and fun activities for students even through the hard times
  - Grants for PE and music
  - Choir activites including community involvment
  - Science of Reading implmentation throughout the building
  - Community outreach through Parent Square and using one platform
  - 1:1 devices
  - Enrichment options
  - Media and Title programs
  - STAR assessment allowing staff to see student growth
  - HOWL Room
- **What are you currently struggling with or directing your resources to address?**
  - Find students who are in need of Science of Reading skills
  - Student attendance
  - Transition of strategies
  - Lack of student maturity
  - Technology
  - Cameras for security
  - Learned helplessness
  - Student retention
  - Amount of time it takes for students to receive services
- **What are you focused on improving individually, in departments or grade levels, and as a building?**
  - Science of Reading
  - Time to allow fidelity using math and reading adopted curriculum
  - Staff focued time
  - Staff mental health/burn out
  - Impending budget and layoffs

**Work Session adjourned at 3:46 p.m.**

**Jon Woods, Board Chair, called the regular board meeting to order at 4:03 p.m.**

**Present:** Jon Woods, Lu Ann Meyer, Rob Ogilvie, Ed Dressel, Zach Steele, Steve Spencer, Juli Lichtenberger, Rachel Alpert, Sean Johnson, Tami Montague, Kas Knoll, Tim Larson, Bob Archer, Darrick Bruns, Autymn Galbraith, Todd Baughman, Nick Ingalls

**Visitors:** Hobe Williams, Kelli McGuire, Danielle Landis, April Chapman, Jennifer Lenoue, Jill Jones, Lynda Spencer, Cindy Read-Keen, Craig Button, Judy White, Trina Timmerman, Brooke Cross, Tammy Salois, Rich Slack, Kristine Blanchard, Sue Finnegan, Kyle Diehm

**1.0 Approval of the Agenda**

Zach Steele moved to approve the agenda as published, seconded by Rob Ogilvie. The motion passed unanimously.

**Jon Woods read in a statement moving the Board into Executive Session.**

**2.0 Executive Session per ORS 192.660**

- (2)(d) To Confer with Persons Designated by the Board to Carry on Labor Negotiations
- (2)(f) To Consider Records Exempt by Law from Public Inspection

**The Board adjourned back into regular session at 4:25 p.m.**

**3.0 Welcome/Pledge of Allegiance**

**4.0 Good News**

- 4.1 The Dallas High School wrestling team traveled to Redmond for the Oregon Classic Tournament. The girls team placed third and boys placed second. Way to go team!
- 4.2 LaCreole Middle School student Terrence Noyes was chosen for state middle school band in Eugene.
- 4.3 LaCreole Middle School received a \$500 MAPS grant.
- 4.4 Olivia Jane Sherman was selected as the Dallas High School December 2023 Rotary/Dutch Bros. Student of the Month. Tim Larson, Dallas High School Principal, and Kas Knoll, LaCreole Middle School Principal, shared good news with the Board.

**5.0 Student Report – Rowan McDowell**

No student report was given.

## **6.0 Public Comment**

No public comment.

## **7.0 Announcements**

### **7.1 January & February Calendars**

7.1.1 Next Board Meeting February 12, 2024 at 6:30 p.m.

7.1.2 Citizens Oversight Committee Meeting February 6, 2024 at 5:30 p.m.

7.1.3 Finance Committee Meeting, February 15, 2024 at 5:30 p.m.  
The January Finance Committee Meeting was rescheduled to February 1, 2024 at 5:30 p.m. due to weather.

## **8.0 Consent Agenda**

### **8.1 Approval of the January 8, 2024 Board Minutes**

Rob Ogilvie moved to approve the Consent Agenda, seconded by Zach Steele. The motion passed unanimously.

## **9.0 Financial Report – Tami Montague**

Tami Montague, Director of Fiscal Services, shared an updated view of the monthly report and asked for feedback from the Board. Tami Montague shared the financial report for month ending December 2023.

## **10.0 District Equity Committee Update – Todd Baughman**

Todd Baughman, Whole Child Administrator, shared information regarding the creation of a District Equity Advisory Committee. The make-up of the committee and duties that will be asked of them was shared.

## **11.0 Resolution #23-24-05 Layoff (Board Action) – Rachel Alpert**

Rachel Alpert, Assistant Superintendent, asked the Board to adopt the provided resolution. Zach Steele moved to approve Resolution #23-24-05 Layoff, seconded by Ed Dressel. The resolution was read out loud by Jon Woods. The motion passed unanimously.

## **12.0 OSEA Level Three Grievance (Board Action) – Kelli McGuire, OSEA President**

Kelli McGuire, OSEA President, and Hobe Williams, OSEA Field Representative, provided documents for the Board regarding the history of unpaid leave on nonstudent contact days by classified staff. The language regarding leave is referenced in Article 10(G) of the Collective Bargaining Agreement. Questions were asked and discussion was held. Zach Steele moved to uphold the decision of Steve Spencer on the Grievance, seconded by Rob Ogilvie. The motion passed unanimously. Hobe Williams shared further information regarding the cost of arbitration.

**13.0 Reports**

13.1 Citizens Oversight Committee Draft Minutes  
No discussion.

**14.0 Discussion Items**

No discussion items.

**15.0 Adjourn at 4:52 p.m.**

\_\_\_\_\_  
**Board Chair / Jon Woods**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Board Secretary / Juli Lichtenberger**

\_\_\_\_\_  
**Date**

www.dallas.k12.or.us

Phone: 503.623.5594 • Fax: 503.623.5597 • Address: 111 SW Ash Street • Dallas, Oregon 97338



Staffing Report  
Monday, February 12, 2023

1/23/2024	Classified	Kurtis (Kloe)	Totten	Name Change	First name changed from Kloe to Kurtis	1/22/2024	LMS	Autism Support	E09G	8	1	D1	
1/25/2024	Classified	Alayna	Canales	New hire	New hire	1/19/2024	OH	Special Needs III - SLP	E09I	5.5	0.6875	E1	Replaces Haley Antonucci
1/25/2024	Classified	Tiffanie	Meyers	New hire	New hire	1/19/2024	OH	Special Needs III - SLP	E09I	5.5	0.6875	E1	Replaces Haley Antonucci

Steve Spencer, Superintendent

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## DALLAS SCHOOL DISTRICT NO. 2 FINANCIAL REPORT 2023-2024

GENERAL FUND									
Revenue & Resources		Nov	Dec	Jan	YTD Total	Projected	Total Received & Projected	Budget	Budget Status
Beginning Fund Balance				2,394,434	2,394,434	-	2,394,434	2,620,000	91%
Taxes		8,339,836	397,246	47,128	8,793,717	173,283	8,967,000	8,967,000	98%
Interest Income		30,725	49,752	49,038	172,951	157,049	330,000	230,000	75%
State School Funds		2,450,988	2,450,988	2,352,641	19,512,499	9,130,491	28,642,990	28,255,243	69%
Common School Fund					-	473,577	473,577	473,577	0%
Other Sources		13,274	112,662	(9,492)	241,883	1,146,548	1,388,431	1,659,421	15%
Total Revenue		10,834,823	3,010,648.14	4,833,749	31,115,484.17	11,080,948	42,196,432	42,205,241	74%
FY 2022-2023 YTD		10,521,315	2,365,340	4,687,437					
Expenditures by Object:		Nov	Dec	Jan	YTD Total	Encumbered	Total Expended & Encumbered	Budget	YTD %
100 Salaries		1,607,216	1,590,403	1,581,814	8,728,300	10,000,907	18,729,207	18,742,547	47%
200 Associated Payroll		941,911	842,621	834,852	4,726,646	5,110,511	9,837,156	10,028,537	47%
300 Services		932,493	750,025	598,889	5,383,717	3,629,698	9,013,415	8,776,921	61%
400 Supplies & Materials		29,288	22,214	30,536	291,110	161,072	452,182	644,561	45%
500 Equipment		7,930	2,150	51,363	297,136	79,759	376,894	397,300	75%
600 Dues, Fees & Insurance		(1,678)	1,670	544	342,374	7,553	349,927	320,475	107%
700 Fund Modifications			117,664		117,664		117,664	128,000	92%
800 Planned Reserve		-	-	-	-	-	-	3,166,900	0%
Not Yet Encumbered/Projected							1,154,146		
Total Expenditures		3,517,160	3,326,746	3,097,997	19,886,948	18,989,499	40,030,592	42,205,241	47%
FY 2022-2023 YTD		3,169,478	3,410,368	3,170,537	11,228,536	20,143,644			
Expenditures by Function: (Appropriated)		Nov	Dec	Jan	YTD Total	Encumbered	Total Expended & Encumbered	Budget	YTD %
1000 Instruction		2,260,729	2,149,732	2,116,116	12,207,506	12,906,981	25,114,487	24,951,315	49%
2000 Support		1,256,431	1,059,350	981,882	7,561,778	6,082,518	13,644,296	13,959,026	54%
3000 Community Service					-	-	-	-	
5000 Transfers			117,664		117,664	-	117,664	128,000	92%
6000 Contingency/Unappropriated					-	-	-	3,166,900	0%
Not Yet Encumbered/Projected							1,154,146		
Total Expenditures		3,517,160	3,326,746	3,097,997	19,886,948	18,989,499	40,030,592	42,205,241	47%
FY 2022-2023 YTD		3,169,478	3,410,368	3,170,537	11,228,536				
Current Projection of Ending Fund Balance							2,165,840	5.44%	
Target % 2023-24								8.00%	
INVESTMENTS									
LGIP 5703 - SSF/Taxes		Nov	Dec	Jan					
Beginning Balance		3,025,787	13,328,842	11,332,765					
Interest		29,833	49,191	47,306					
Deposits		13,547,059	2,791,209	2,221,609					
Fees		(2)	(0)	(0)					
Withdrawals		(3,273,835)	(4,836,477)	(3,655,283)					
Month-End Balance		13,328,842	11,332,765	9,946,397					
LGIP 5770 - Debt Service									
Beginning Balance		859,701	1,013,036	3,634,223					
Interest		4,197	15,594	15,585					
Deposit		173,835	2,886,477	55,283					
Fees			(10)	(10)					
Withdrawals		(24,697)	(280,873)	-					
Month-End Balance		1,013,036	3,634,223	3,705,081					
LGIP 5018 - Facilities, Repairs & Maintenance									
Beginning Balance		144,653	145,247	145,864					
Interest		594	617	618					
Deposit									
Fees									
Withdrawals		-	-	-					
Month-End Balance		145,247	145,864	146,482					
LGIP 3974 - Bond Retainage									
Beginning Balance		89,933	10,829	10,875					
Interest		44	46	241					
Deposit				56,496					
Fees									
Withdrawals		(79,149)							
Month-End Balance		10,829	10,875	67,612					
LGIP 6022 - GO Bonds Series 2017&2022									
Beginning Balance		9,049,346	9,166,009	9,204,933					
Interest		37,514	38,924	38,782					
Deposit		79,149	-	(56,496)					
Fees									
Withdrawals									
Month-End Balance		9,166,009	9,204,933	9,187,220					
Total Cash Invested in LGIP		23,663,964	24,328,661	23,052,792					
LGIP Interest Rate		5.00%	5.00%	5.00%					
NOTES ON DEBT SERVICE									
NOTES TO FINANCIAL STATEMENT:									
All cash, investment and credit card accounts have been balanced, reconciled and reviewed and all cash and investment accounts are reconciled to the general ledger by the business manager as of 1/31/2024. The adopted budget reflects expected expenditures. All payroll reports have been filed and payroll liabilities have been paid timely. All federal and state reimbursement requests as well as required financial reporting forms have been filed timely. All credit card expenditures, travel and other reimbursements have been reviewed and approved at the proper level. There have been no significant changes to the internal control system, to the accounting system or accounting policies that are significant. Currently the business office is adequately staffed to allow for proper segregation of duties and I am not aware of any new pronouncements or other financial changes that may require additional staff time to properly implement. All financial statements that have been provided to the board are accurate and complete to the best of my knowledge and I am aware of no other financial matters that the board should be aware of at this time. I know of no cases of fraud or other misconduct and I have not been asked by the superintendent to do anything that makes me feel uncomfortable or to present any information I feel is inaccurate. Tami Montague 2/5/2024.									
SUMMARY - ALL FUNDS									
		Nov	Dec	Jan	YTD				
Total Revenue This Month		16,342,979	4,744,546	21,549,092	56,242,595	Add Student Act Funds	1,350,000	82,101,386	69%
Total Expense This Month		4,547,580	4,505,332	4,794,368	29,513,649			82,101,386	36%
Excess / (Deficiency)									
Variance		11,795,399	239,215	16,754,724	26,728,945				
ALL FUNDS									



## DALLAS SCHOOL DISTRICT NO. 2 FINANCIAL REPORT 2023-2024

FUND 102	<b>FACILITIES, REPAIRS&amp; MAINTENANCE</b>								
	<b>Revenue &amp; Resources</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Expected</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Beginning Fund Balance		155,430	155,430	-	155,430	150,000	104%	
	Revenue from Local Sources	594	617	618	4,008	4,008	18,000	22%	
	Transfers/Sale of Property				-	-	96,000	0%	
	<b>Total Revenue</b>	594	617	156,047	159,438	-	264,000	60%	
	<b>Expenditures by Function:</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Instruction - 1000	2,471	149	298	112,741	8,412	69,710	6%	
FUND 103	Facilities - 2000	11,725			11,725	11,725	204,030	0%	
	Capital Projects - 4000				-	-	10,000	0%	
	Unap End Fund Balance				-	-	49,970	0%	
	<b>Total Expenditures</b>	14,196	149	298	124,466	8,412	333,710	37%	
	<b>ESSER Emergency Relief Funds</b>								
	<b>Revenue &amp; Resources</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Expected</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Beginning Fund Balance			-	-	-	-		
	Revenue from Federal Sources	124,042	652,926	120,968	1,195,247	1,195,247	2,715,202	44%	
	Transfers/Sale of Property				-	-	-		
FUND 203	<b>Total Revenue</b>	124,042	652,926	120,968	1,195,247	-	2,715,202	44%	
	<b>Expenditures by Function:</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Instruction - 1000	18,802	18,092	28,375	345,866	160,332	649,563	49%	
	Support Services - 2000	61,226	102,876	102,958	980,713	627,169	2,065,638	49%	
	Unap End Fund Balance				-	-	-		
	<b>Total Expenditures</b>	80,028	120,968	131,332	1,326,579	787,501	2,114,081	49%	
	<b>FOOD SERVICE</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Expected</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
FUND 201-299	Beginning Fund Balance			55,395	55,395	55,395	200,000	28%	
	Revenue from Local Sources	659	59	134	1,998	1,998	26,000	8%	
	Revenue from State Sources	283	3,470	144	3,897	3,897	77,000	5%	
	Revenue from Federal Sources	180,290	85,806	59,352	362,403	90,000	1,080,000	34%	
	Transfers/Sale of Property				-	-	10,000		
	<b>Total Revenue</b>	181,233	89,335	115,025	423,693	90,000	1,393,000	30%	
	<b>Expenditures by Function:</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Food Service - 3100	108,498	104,826	92,613	558,711	565,780	1,279,140	44%	
	Food Service - Unap Ending Fund Bal				-	-	113,860	0%	
FUND 301	<b>Total Expenditures</b>	108,498	104,826	92,613	558,711	565,780	1,393,000	40%	
	<b>MTD CashFlow Tracking Includes Receivables</b>								
				(45,018)					
	<b>SPECIAL GRANTS &amp; PROJECTS</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>			<u>Budget</u>	<u>YTD %</u>	
	Revenue from Local Sources	8,025	6,401	11,546	55,040		196,000	28%	
	Revenue from Intermediate Sources		125,000		125,000		500,000	25%	
	Revenue from State Sources	70,782	247,590	2,251,411	2,569,782		4,745,048	54%	
	Revenue from Federal Sources	154,813	80,705	68,674	414,848		1,867,895	22%	
	Transfers from General Fund				-		-		
FUND 302	<b>Total Revenue</b>	233,620	459,695	2,331,630	3,164,671		7,308,943	43%	
	<b>Expenditures by Function:</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Special Grants & Projects - 1000	390,558	373,565	360,338	2,090,443	2,522,237	5,747,540	36%	
	Special Grants & Projects - 2000	62,230	146,629	52,426	537,251	419,891	957,142	37%	
	Special Grants & Projects - 3000				845		845	3%	
	Transfers to Other Funds - 5000				-	-	96,000	0%	
	<b>Total Expenditures</b>	452,788	520,194	412,763	2,628,538	2,942,129	5,570,667	36%	
	<b>DEBT SERVICE - GO BONDS</b>								
	<b>Revenue &amp; Resources</b>								
FUND 301	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Expected</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Beginning Fund Balance			822,129	822,129	822,129	600,000	137%	
	Revenue from CY Property Tax Receipts	2,940,701	139,429	15,194	3,095,324	3,095,324	3,200,000	97%	
	Revenue from PY Property Tax Receipts	13,145	1,308	1,588	19,613		50,000		
	Revenue from Interest Income	4,197	15,594	16,090	48,742	48,742	45,000	108%	
	Revenue from Federal Sources			111	230	230	500		
	Transfers from Other Fund				-	-	-		
	<b>Total Revenue</b>	2,958,043	156,331	855,113	3,986,038	-	3,895,500	102%	
	<b>Expenditures by Function:</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
FUND 302	Debt Service - 5110 610 Principal				-	-	2,815,000	0%	
	Debt Service - 5110 621 Interest	24,697	280,883		305,580	305,580	611,150	50%	
	Debt Service - 5110 640 Bank Fees			10	20	20	100	20%	
	Debt Service - Unap End Fund Bal				-	-	469,250	0%	
	<b>Total Expenditures</b>	24,697	280,883	10	305,600	-	3,895,500	8%	
	<b>DEBT SERVICE - FULL FAITH &amp; CREDIT</b>								
	<b>Revenue &amp; Resources</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Expected</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Beginning Fund Balance			100			-		
	Transfers from Other Fund		117,664		117,664		118,000	100%	
	<b>Total Revenue</b>	-	117,664	100	117,764		118,000	100%	
	<b>Expenditures by Function:</b>								
	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>	
	Debt Service - 5110 610 Principal				-	-	100,000	0%	
	Debt Service - 5110 621 Interest		8,782		8,782	8,782	17,564	50%	
	Debt Service - 5110 640 Bank Fees				-	-	436	0%	
	Debt Service - Unap End Fund Bal				-	-	-		
	<b>Total Expenditures</b>	-	8,782	-	8,782	-	118,000	7%	



## DALLAS SCHOOL DISTRICT NO. 2 FINANCIAL REPORT 2023-2024

FUND 310	<b>DEBT SERVICE - PERS PENSION BOND</b>								
	<b>Revenue &amp; Resources</b>								
		<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Expected</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>
	Beginning Fund Balance			799,000	799,000			1,000,000	
	Service From Other Funds	205,536	201,948	199,257	1,082,615		1,082,615	2,250,000	48%
	<b>Total Revenue</b>	<b>205,536</b>	<b>201,948</b>	<b>998,256</b>	<b>1,881,615</b>	<b>-</b>	<b>1,082,615</b>	<b>3,250,000</b>	<b>58%</b>
	<b>Expenditures by Function:</b>								
		<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>
	Debt Service - 5110 610 Principal	-	-	-	-	-	-	1,345,000	0%
	Debt Service - 5110 621 Interest	-	-	-	-	-	-	811,358	0%
Funds 401	Debt Service - 5110 680 Direct Pmt to PERS								
	Debt Service - 5110 Bank Fees & Issuance							100	
	Debt Service - Unap End Fund Bal	-	-	-	-	-	-	1,093,542	
	<b>Total Expenditures</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3,250,000</b>	<b>0%</b>
	<b>Revenue &amp; Resources</b>								
		<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Expected</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>
	Beginning Fund Balance			92,417	92,417		92,417	100,000	92%
	Revenue from Local Sources	45	16,458	(23,976)	723		723	1,500	
	Revenue from State Sources	1,767,528		41,001	1,808,529		1,808,529	2,000,000	90%
	Revenue from Bond Proceeds	-	-	-	-		-	-	
	<b>Total Revenue</b>	<b>1,767,572</b>	<b>16,458</b>	<b>109,442</b>	<b>1,901,669</b>	<b>-</b>	<b>1,901,669</b>	<b>2,101,500</b>	<b>90%</b>
FUND 403	<b>Capital Construction - Bond 2022</b>								
	<b>Revenue &amp; Resources</b>								
		<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>		<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>
	Beginning Fund Balance			11,989,979	11,989,979		11,989,979	13,300,000	
	Revenue from Local Sources	37,514	38,924	38,782	306,997		306,997	200,000	153%
	Revenue from State Sources							4,000,000	
	Revenue from Bond Proceeds							-	
	<b>Total Revenue</b>	<b>37,514</b>	<b>38,924</b>	<b>12,028,761</b>	<b>12,296,976</b>		<b>12,296,976</b>	<b>17,500,000</b>	<b>70%</b>
	<b>Expenditures by Function:</b>								
		<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>YTD Total</u>	<u>Encumbered</u>	<u>Total Projected</u>	<u>Budget</u>	<u>YTD %</u>
	Capital Expenses- 4000	338,904	113,091	1,059,354	2,871,373	5,979,190	8,850,563	11,140,000	26%
	Capital Projects - Unap End Fund Bal							6,360,000	

For questions about this report, please contact Tami Montague  
Dallas School District Business Office  
111 SW Ash St, Dallas, OR 97338  
tami.montague@dsd2.org

# District Name: Dallas SD 2

2021-22

## English Learner Enrollment Counts

English Learners	Elementary (K-5)	Middle (6-8)	High (9-12)	Total
<i>Current</i>	30-39	21	15	70
<i>Former</i>	*	10-19	30-39	49
<i>Ever</i>	39	35	45	119
<i>Never</i>	1,326	685	879	2,890

<i>Total Students</i>	1,365	720	924	3,009
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*Note.* Student counts in this table reflect enrollments as of the 1st school day in May 2022. '\*' suppresses counts less than 10 students. Intervals suppress counts as part of complementary suppression.

## Current English Learner Demographic Characteristics

Characteristics	Count	Percent
<i>Economically Disadvantaged</i>	31	44.3
<i>Students with Disabilities</i>	15	21.4
<i>Interrupted Formal Education</i>	*	*
<i>Recent Arrivers</i>	*	*
<i>Migrant</i>	--	--
<i>Houseless</i>	*	*
<i>Mobile</i>	12	17.1
<i>Long-term</i>	22	31.4

*Note.* Student counts and percentages in this table reflect enrollments as of the 1st school day in May 2022. '\*' suppresses counts less than 10 students, < 5 suppresses values less than 5 percent, and > 95 suppresses values greater than 95 percent.

# Determination and Ratings

Elementary Grades Indicator	Level (1-5)	Bonus (0 or 1)	Points (1-6)	Weighted Points	Secondary Grades Indicators	Level (1-5)	Bonus (0 or 1)	Points (1-6)	Weighted Points
<i>On Track to ELP</i>	1	X	1	1 x 30	<i>On Track to ELP</i>	1	X	1	1 x 15
<i>Regular Attendance</i>	1	0	1	1 x 15	<i>Regular Attendance</i>	1	0	1	1 x 10
<i>Exclusionary Discipline</i>	5	1	6	6 x 15	<i>Exclusionary Discipline</i>	3	0	3	3 x 10
<i>ELA Achievement</i>	1	0	1	1 x 10	<i>Least Restrictive Environment</i>	2	1	3	3 x 10
<i>ELA Growth</i>	X	X	X	X x 10	<i>9<sup>th</sup> Grade On-Track</i>	2	1	3	3 x 15
<i>Math Achievement</i>	1	0	1	1 x 10	<i>5-Year Graduation</i>	--	--	--	-- x 30
<i>Math Growth</i>	X	X	X	X x 10	<i>Post-Secondary Enrollment</i>	--	--	--	-- x 10
Total Weighted Points				155	Total Weighted Points				130
Total Weighted Points Available				400	Total Weighted Points Available				300
Percent of Weighted Points				38.8	Percent of Weighted Points				43.3
Elementary Grades Rating				Limited Progress	Secondary Grades Rating				Limited Progress

Determination:	Transformation
<b>Transformation:</b> Limited Progress on both ratings  <b>Target:</b> Limited Progress on one rating  <b>None:</b> Some Progress or Notable Progress on both ratings	

## Ratings Criteria:

**Notable Progress:** ≥ 75.0% of weighted points available

**Some Progress:** 50.0 to 74.9% of weighted points available

**Limited Progress:** < 50.0% of weighted points available

*Note.* Districts may earn a bonus point for each indicator if the value for Ever English Learners is greater than the value for Never English Learners. The bonus point does not apply to *On Track to ELP*. '--' refers to not applicable due to small n-size.

## Elementary Grades Indicators, Values, Levels, and Ratings

Indicator	Grades	English Learners	Never English Learners	Level (1-5)	Bonus (0 or 1)	Points (1-6)	Indicator Rating
<i>On Track to ELP</i>	K-5	42.9		1		1	Limited Progress
<i>Regular Attendance</i>	K-5	18.8	54.5	1	0	1	Limited Progress
<i>Exclusionary Discipline</i>	K-5	>95	>95	5	1	6	Notable Progress
<i>ELA Achievement</i>	3-8	24.1	40.3	1	0	1	Limited Progress
<i>ELA Growth</i>	4-8						
<i>Math Achievement</i>	3-8	5.6	26.9	1	0	1	Limited Progress
<i>Math Growth</i>	4-8						

Note. On Track to ELP relies on Current English Learners as the focal student group. All other indicators use Ever English Learners as the focal student group. \*\* suppresses counts less than 10 students, < 5 suppresses values less than 5 percent, and > 95 suppresses values greater than 95 percent. -- refers to not applicable due to small n-size.

## Secondary Grades Indicators, Values, Levels, and Ratings

Indicator	Grades	English Learners	Never English Learners	Level (1-5)	Bonus (0 to 1)	Points (1-6)	Indicator Rating
<i>On Track to ELP</i>	6-12	22.9		1		1	Limited Progress
<i>Regular Attendance</i>	6-12	42.1	58.2	1	0	1	Limited Progress
<i>Exclusionary Discipline</i>	6-12	92.5	93.0	3	0	3	Some Progress
<i>Least Restrictive Environment</i>	6-12	77.3	67.3	2	1	3	Some Progress
<i>9th Grade On-Track</i>	9	80.0	73.2	2	1	3	Some Progress
<i>5-Year Graduation</i>	12	*	*	--	--	--	N-Size
<i>Post-Secondary Enrollment</i>	12	*	*	--	--	--	N-Size

Note. On Track to ELP relies on Current English Learners as the focal student group. All other indicators use Ever English Learners as the focal student group. \*\* suppresses counts less than 10 students, < 5 suppresses values less than 5 percent, and > 95 suppresses values greater than 95 percent. -- refers to not applicable due to small n-size.

# Elementary Grades Indicators, Thresholds, and Levels

<i>On Track to ELP (K-5)</i>	
Threshold	Level
≥ 78.65	5
73.25 to 78.64	4
69.55 to 73.24	3
62.25 to 69.54	2
< 62.25	1

<i>Regular Attendance (K-5)</i>	
Threshold	Level
≥ 94.34	5
88.40 to 94.33	4
83.70 to 88.39	3
80.10 to 83.69	2
< 80.10	1

<i>Exclusionary Discipline (K-5)</i>	
Threshold	Level
≥ 97.00	5
94.00 to 96.99	4
91.00 to 93.99	3
88.00 to 90.99	2
< 88.00	1

<i>ELA Achievement (3-8)</i>	
Threshold	Level
≥ 41.16	5
36.80 to 41.15	4
29.20 to 36.79	3
24.65 to 29.1	2
< 24.65	1

<i>ELA Growth (4-8)</i>	
Threshold	Level
≥ 58.95	5
55.38 to 58.94	4
50.00 to 55.37	3
44.50 to 49.99	2
< 44.50	1

The level for each indicator corresponds to a value that is equal to or greater than a specific threshold:

- Level 5 threshold: ≥ 90<sup>th</sup> percentile
- Level 4 threshold: ≥ 75<sup>th</sup> percentile and < 90<sup>th</sup> percentile
- Level 3 threshold: ≥ 50<sup>th</sup> percentile and < 75<sup>th</sup> percentile
- Level 2 threshold: ≥ 25<sup>th</sup> percentile to < 50<sup>th</sup> percentile
- Level 1 threshold: < 25<sup>th</sup> percentile

Note. The ODE will freeze these thresholds for the next four years in order to monitor the progress of districts. The ODE may change the thresholds if there are substantial changes to the calculation or if the indicator no longer exists.

<i>Math Achievement (3-8)</i>	
Threshold	Level
≥ 29.58	5
25.25 to 29.57	4
20.80 to 24.24	3
16.60 to 20.79	2
< 16.60	1

<i>Math Growth (4-8)</i>	
Threshold	Level
≥ 61.00	5
54.38 to 60.99	4
48.50 to 54.37	3
44.0 to 48.49	2
< 44.0	1

**Indicator Ratings:**

**Notable Progress:** Level + bonus ≥ 4 points

**Some Progress:** Level + bonus ≥ 2 and < 4 points

**Limited Progress:** Level + bonus = 1 point



# Secondary Grades Indicators, Thresholds, and Levels

<i>On Track to ELP (6-12)</i>	
Threshold	Level
≥ 55.20	5
44.90 to 55.19	4
37.90 to 44.89	3
30.10 to 37.89	2
< 30.10	1

<i>Regular Attendance (6-12)</i>	
Threshold	Level
≥ 90.75	5
83.00 to 90.74	4
77.50 to 82.99	3
72.05 to 77.49	2
< 72.05	1

<i>Exclusionary Discipline (6-12)</i>	
Threshold	Level
≥ 97.00	5
94.00 to 96.99	4
91.00 to 93.99	3
88.00 to 90.99	2
< 88.00	1

<i>Least Restrictive Environment (6-12)</i>	
Threshold	Level
≥ 91.60	5
84.53 to 91.59	4
77.85 to 84.52	3
66.18 to 77.84	2
< 66.18	1

<i>9<sup>th</sup> Grade On-Track</i>	
Threshold	Level
≥ 94.01	5
90.00 to 94.00	4
83.30 to 89.99	3
73.88 to 83.29	2
< 73.88	1

<p>The level for each indicator corresponds to a value that is equal to or greater than a specific threshold:</p> <ul style="list-style-type: none"> <li>Level 5 threshold: ≥ 90<sup>th</sup> percentile</li> <li>Level 4 threshold: ≥ 75<sup>th</sup> percentile and &lt; 90<sup>th</sup> percentile</li> <li>Level 3 threshold: ≥ 50<sup>th</sup> percentile and &lt; 75<sup>th</sup> percentile</li> <li>Level 2 threshold: ≥ 25<sup>th</sup> percentile to &lt; 50<sup>th</sup> percentile</li> <li>Level 1 threshold: &lt; 25<sup>th</sup> percentile</li> </ul> <p><i>Note.</i> The ODE will freeze these thresholds for the next four years in order to monitor the progress of districts. The ODE may change the thresholds if there are substantial changes to the calculation or if the indicator no longer exists.</p>	
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<i>5-Year Graduation</i>	
Threshold	Level
≥ 93.70	5
89.60 to 93.69	4
83.30 to 89.59	3
76.50 to 83.29	2
< 76.50	1

<i>Post-Secondary Enrollment</i>	
Threshold	Level
≥ 66.70	5
58.98 to 66.69	4
53.70 to 58.97	3
44.75 to 53.69	2
< 44.75	1

<p><b>Indicator Ratings:</b></p> <p><b>Notable Progress:</b> Level + bonus ≥ 4 points</p> <p><b>Some Progress:</b> Level + bonus ≥ 2 and &lt; 4 points</p> <p><b>Limited Progress:</b> Level + bonus = 1 point</p>	
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# English Learners in Oregon

Annual Report 2021-22

June 2023



**OREGON**  
**DEPARTMENT OF**  
**EDUCATION**

*Oregon achieves . . . together!*

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## Executive Summary

ORS 327.016 directs the Oregon Department of Education (ODE) to prepare an annual report on English learner program funding and student outcomes. The report's intention is to describe the population of English Learners in Oregon and provide a summary of district and state progress towards meeting their needs and objectives. This report is also available on [ODE's legislative reports webpage](#). Any member of the public can contact the Government Relations and External Affairs Director to request a copy of this report.

## Definitions

ORS 327.016 describes students who receive English language instruction, supports, and services as part of an English language development (ELD) program as English learners. While these students are learning English in an ELD program, the English learner label only focuses on a singular dimension (i.e., learning English) and does not reflect the linguistic and cultural assets of the students (García, 2009). Thus, although this report will use the English Learner label in order to comply with ORS 327.016, we recognize these students are multilingual learners who bring valuable linguistic and cultural assets.

The ODE annually reports four groups of English learners: current, former, ever, and never English learners. Current English learners are multilingual students who were learning English in an ELD program during the 2021-22 school year<sup>1</sup>. Former English learners are multilingual students who demonstrated English proficiency and exited an ELD program prior to the 2021-22 school year. Ever English learners are the combination of both current and former English learners. Finally, never English learners are monolingual English or multilingual students who were not eligible to receive English language instruction, supports, and services in an ELD program before or during the 2021-22 school year.

## Nearly 100,000 students in Oregon are current or former English learners.

As of May 1, 2022, 546,726 students enrolled in Oregon public schools and districts. Among those students, 10.4 percent were current English learners (56,683 students), 7.8 percent were former English learners (42,770 students), and 81.8 percent were never English learners (447,273 students). Both current and former English learners (i.e., ever English learners constituting 18.2 percent of students) were an incredibly diverse student population in 2021-22.

The distribution of current English learners varied across grade levels and districts in Oregon during the 2021-22 school year. Woodburn School district served the highest percentage of current English learners, with 41.5 percent of students learning English in an ELD program as of May 1, 2022. On the other hand, 67.5 percent of Oregon districts either had no current English learners or very few (i.e., less than 5% of all students).

Other key features of the English learner student population in the 2021-22 school year include the following:

- The majority of current English learners were in elementary grades (61.1%) while the majority of former English learners were in high school grades.

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<sup>1</sup> Note that current English learners also include students who are eligible to receive English language instruction, supports, and services in an ELD program but do not participate because their parents or guardians waive English language instruction, supports, and services.

## English Learners in Oregon

- The number of recently arrived current English learners (i.e., new immigrant students) declined from 4,373 in 2020-21 to 4,145 students in 2021-22.
- Spanish was the predominant home language of current English learners (76.6%), but overall there were 199 documented unique home languages (an increase of 18 languages from 2020-21) spoken by current English learners. Other prevalent languages include Russian, Vietnamese, Chinese, Arabic, Chuukese, and Somali; each being the home language of about 2 percent of current English learners.
- Approximately 77 percent of current English learners were Latino/a/x, and 31.7 percent of Latino/a/x students were current English learners. A similar percentage of Native Hawaiian/Pacific Islander students (30.3%) were current English learners.

### **English learners are overrepresented in special education and underrepresented in TAG programs.**

The report also examines the involvement of English learners in targeted federal and state programs: free or reduced price meals, special education, migrant education, and the talented and gifted (TAG) program.

Key findings include the following:

- A higher percentage of current English learners received special education services and supports as compared to never English learners (20.3 vs. 15.4%); however, ever English learners and never English learners had similar percentages of students receiving special education services and supports (14.5 vs. 15.4%).
- Almost 9.0 percent of current English learners received services in migrant education programs (i.e., 5,131 students). Additionally, 51.4 percent of the students in migrant education programs were current English Learners
- While across Oregon 6.5 percent of never English learners participated in TAG programs, this figure was 4.9 percent for former English learners and just 0.4 percent for current English learners.

### **Younger English learners are more likely to be on track to English Language Proficiency than their older peers.**

Oregon monitors whether or not current English learners are on-track to attain English language proficiency within seven years. More than half of current English learners (53.2%) in elementary school grades were on track. In contrast, current English learners in middle or high school grades as well as current English learners with disabilities were much less likely to be on track.

### **Very few current English learners are meeting state standards in English Language Arts and Mathematics.**

A substantially smaller percentage of current English learners in elementary schools (7.0%) versus former (38.7%) and never English learners (47.8%) met or exceeded state standards in English Language Arts in 2021-22. A similar trend is observed at middle and high schools.

Similarly, a substantially smaller percentage of current English learners in elementary schools (7.1%) versus former (36.9%) and never English learners (39.2%) met or exceeded state standards in mathematics in 2021-22. A similar trend is observed at middle and high schools.

### **Attendance tends to be higher in elementary grades, particularly among former English learners**

Former and never English learners have the highest levels of regular attendance (76.1 and 68.7%) in elementary school grades. Current English learners have rates of regular attendance substantially lower in elementary (60.3%), middle (56.1%), and high school (43.5%) grades. Regular attendance rates decline for current, former, and never English learners in middle and high school grades.

### **Current English learners are more likely to graduate with a modified diploma**

Former English learners graduated at rates better than never English learners (86.4 vs. 81.7%) in 2021-22; however, substantially fewer current English learners graduated in four years (65.3%). Moreover, current English learners that graduated in four years were over 2.7 times more likely to receive a modified rather than a regular diploma compared to that for never English learners. This ratio increased to 3.4 times for the cohorts that graduated in five years.

### **Students designated as English learners in high school are less likely to go to college than their peers.**

Postsecondary enrollment rates for former English learners were comparable to those of never English learners; in both cases, about 55 percent of high school graduates enroll in college within 16 months of graduation. On the other hand, current English learners were less likely to enroll in postsecondary education institutions. About 38 percent of current English learners went on to college within 16 months of high school graduation.

### **District revenues and expenditures**

As in reports from previous years, this report summarizes the ratio of expenditures to revenues. In 2021-22, that ratio was 0.86, decreased from 0.95 in 2020-21.

## Introduction

In 2021-22, students who received English language instruction, supports, and services in an English language development (ELD) program as well as students who exited the ELD program prior to the 2021-22 school year made up 18.2 percent of all students in Oregon public schools and districts (as of the first school day in May 2022). They form a vital part of our student communities and bring a variety of cultural and linguistic assets that enrich our schools and districts. This report describes this diverse population of students, examines their academic progress and achievement, and summarizes information about key aspects of the education they receive in our state.

## Why this report?

ORS 327.016 directs the Oregon Department of Education (ODE) to prepare an annual report on English learner program funding and student outcomes. The report's intention is to describe the population of English Learners in Oregon and provide a summary of district and state progress towards meeting their needs and objectives in ELD programs. ORS 327.016 requires ODE to include the following information in the annual report:

- English learner student demographics;
- Length of participation in ELD programs;
- Participation in special education and related services; and
- Other information identified by the ODE.

In addition, the annual report must include the following financial information:

- Allocations to each school district from the State School Fund for students enrolled in ELD programs;
- The extent to which districts expend these allocations for students enrolled in ELD programs; and
- The categories of expenditures for ELD program funding.

Each annual report looks back at the prior school year, which for this year is the 2021-22 school year. This report will be available on the ODE website, submitted to House and Senate Education Committees, and provided to district school boards. State law requires the report to be available to the public at each district's main office and on district websites.

## Definitions

ORS 327.016 describes students who receive English language instruction, supports, and services as part of an ELD program as English learners. While these students are learning English in an ELD program, the English learner label only focuses on a singular dimension (i.e., learning English) and does not reflect the linguistic and cultural assets of the students (García, 2009). Thus, although this report will use the English Learner label in order to comply with ORS 327.016, we recognize these students are multilingual and value their linguistic and cultural assets.

The ODE annually reports four groups of English learners: current, former, ever, and never English learners. Current English learners are multilingual students who were learning English in an ELD program during the

2021-22 school year<sup>2</sup>. Former English learners are multilingual students who demonstrated English proficiency and exited an ELD program prior to the 2021-22 school year. Ever English learners are the combination of both current and former English learners. Finally, never English learners are monolingual or multilingual students who were not eligible to receive English language instruction, supports, and services in an ELD program before or during the 2021-22 school year.

## Structure of this report

This report consists of five sections:

Section 1: Demographics of English Learners

Section 2: Participation in Targeted Programs

Section 3: Language Development and Academic Achievement

Section 4: Attendance, Progress toward Graduation, Graduation, and Beyond

Section 5: State Revenues and Expenditures for English Learners

Several aspects of this year's report differ from the reports the ODE issued in previous years. For example, where appropriate, this report provides comparisons to never English learners (i.e., students not eligible to receive services from an ELD program). Furthermore, in addition to describing statewide patterns, in some cases the report indicates which districts serve high percentages of certain types of students (e.g., students participating in migrant education programs). Finally, this year's report provides data insights into Student Academic Outcomes in English Language Arts and Mathematics that were not available during the period impacted by the COVID-19 pandemic.

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<sup>2</sup> Note that current English learners also include students who are eligible to receive English language instruction, supports, and services in an ELD program but do not participate because their parents or guardians waive English language instruction, supports, and services.

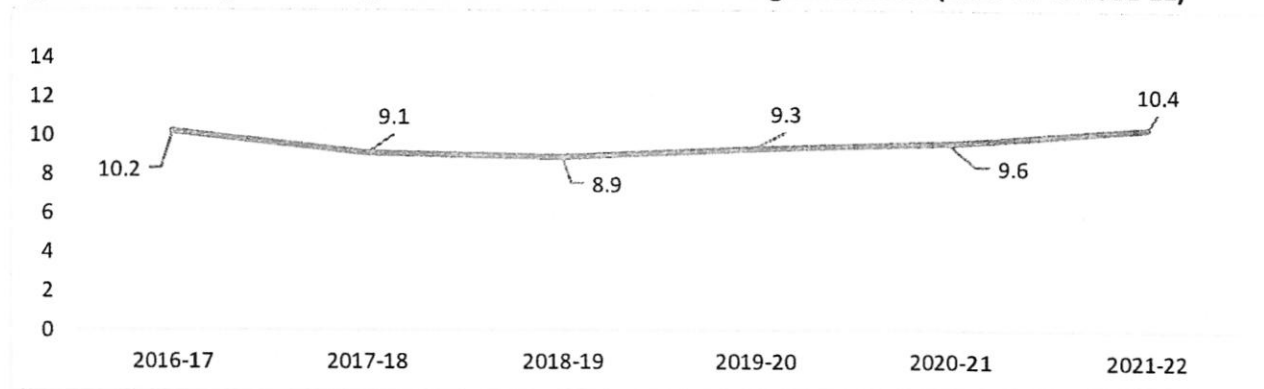
## Section 1: Demographics of English Learners in Oregon in 2020-21

Almost one in five Oregon students has been designated as an English learner. As of the first school day in May 2022, 546,726 students enrolled in Oregon public schools and districts. Among those students, 10.4 percent were current English learners (56,683 students), 7.8 percent were former English learners (42,770 students), and 81.8 percent were never English learners (447,273 students). Both current and former English learners were an incredibly diverse student population in 2021-22 (representing 18.2 percent of all students). These students brought a rich linguistic and cultural heritage to their classrooms, schools, and communities. This section summarizes the demographics of Oregon's English learner population, considering grade levels, interruptions in formal education among newcomer immigrant students, and racial, ethnic, and linguistic diversity.

### Current and Former English Learners

Current English Learners are multilingual students who are learning English in an ELD program during the school year<sup>3</sup>. They receive English language instruction, supports, and services because they are to help them become proficient in English. Identification of English learners is done using a Language use Survey (LUS) as well as an English Language Proficiency Assessment (ELPA) screener. In 2021-22, 56,683 of Oregon's 546,726 K-12 students, or 10.4 percent, were current English learners<sup>4</sup> (see figure 1).

**Figure 1. Percentage of all Oregon students who were current English Learners (2016-17 to 2021-22)**



A smaller number of students in 2021-22 (42,770 or 7.8%) were former English learners. Former English learners are multilingual students who demonstrated English proficiency and exited an ELD program prior to the 2021-22 school year. Research does suggest, however, that former English learners may still need support to develop high levels of proficiency in academic English (i.e., the language students need in order to be successful in school; see de Jong 2004; Flores, Batalova & Fix, 2012). Districts are required to monitor the academic progress for four years following an English learner exiting as proficient from the English language development program per ESSA Title III. Given its importance, during its monitoring process, ODE reviews

<sup>3</sup> Note that current English learners also include students who are eligible to receive English language instruction, supports, and services in an ELD program but do not participate because their parents or guardians waive English language instruction, supports, and services.

<sup>4</sup> The data for this portion of the report relies on student enrollments as of the first school day in May 2022.



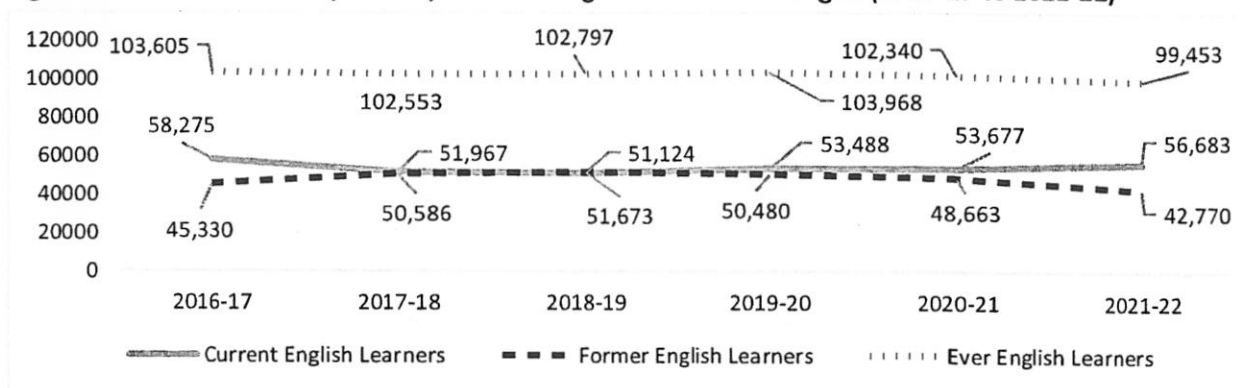
## English Learners in Oregon

the ways in which the districts monitor the progress of former English learners and provides them with feedback to enhance the districts' ability to support former English learners continued progress.

Comparisons between current, former, ever, and never English learners are useful to understand the experiences and outcomes of English learners over time, and to counter misperceptions about English learner achievement. Current English Learners tend to perform at lower levels while still developing English, particularly on assessments of content knowledge that are administered in English, which can negatively impact their performance. However, once current English learners attain English language proficiency, they often perform academically at significantly higher levels than their peers, including monolingual English speakers indicating the value of bilingualism (Thompson, Umansky, & Rew, 2022; Hopkins, Thompson, Linquanti, Hakuta, & August, 2013).

Oregon has had a largely stable population of approximately 100,000 English learners (former and current) over the past several years. Figure 2 shows the change in the count of current, former, and ever English learners in Oregon over the last six school years. In general, it displays a slightly fluctuating population of ever English learners in Oregon, starting at 103,605 in 2016-17 and, after increasing and declining for a couple years, reaching 99,453 students in 2021-22.

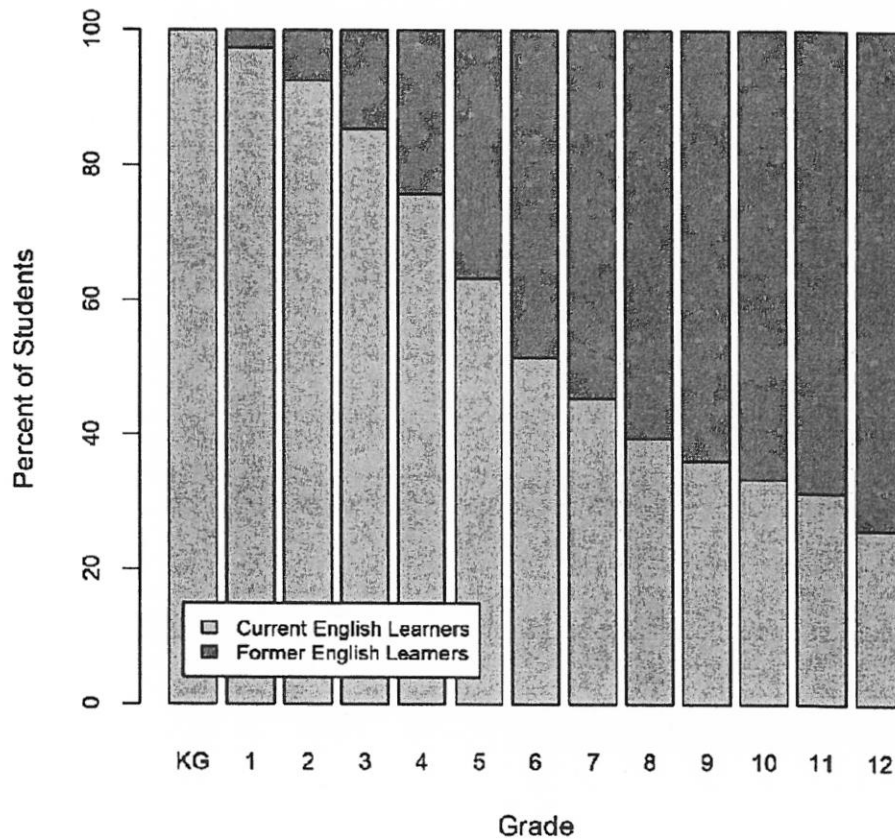
**Figure 2. Number of current, former, and ever English Learners in Oregon (2016-17 to 2021-22)**



### The majority of current English Learners were in the elementary grades.

Although there were current English learners at every grade level, approximately two-thirds (61.1%) were in kindergarten through fifth grade. Far fewer current English learners were in middle school (grades 6-8; 19.7%) or in high school (grades 9-12; 19.2%). Figure 3 shows the percent of current and former English learners by grade in 2021-22. As the grade level increases from kindergarten to twelfth grade, the percent of current English learners decreases as they attain English proficiency and exit their ELD programs (subsequently, this results in an increase of former English learners). For example, across the elementary grades, the percentage of elementary students who are English learners ranges from 63.2 percent to 100 percent, while in the secondary grades it ranges from 39.5 percent to 51.5 percent, and in high school it ranges from 25.9 percent to 36.2 percent.



**Figure 3. Comparison of the percentage of current and former English learners by grade in 2021-22**

### English Learner enrollment was not uniform across Oregon districts.

Oregon has 197 school districts. In 2021-22, 146 districts provided English language instruction, supports, and services to current English learners. Over 80 districts participate in Title III funds in a consortium as these districts have fewer than 65 identified English learners and therefore do not generate the federally required \$10,000 minimum Title III sub-grant. These districts with small EL populations may experience challenges with the students being enrolled across several grade levels, may have different English language proficiency levels, or may have limited ELD teachers. The remaining districts in Oregon currently do not have any enrolled English learners.

Figure 4 shows the distribution of current English learners across Oregon districts in 2021-22. There were eight districts with more than 2,000 current English learners. Thus, in 2021-22, districts differed in terms of both the number of current English learners and/or the percentage of their student population who received English language instruction, supports, and services.

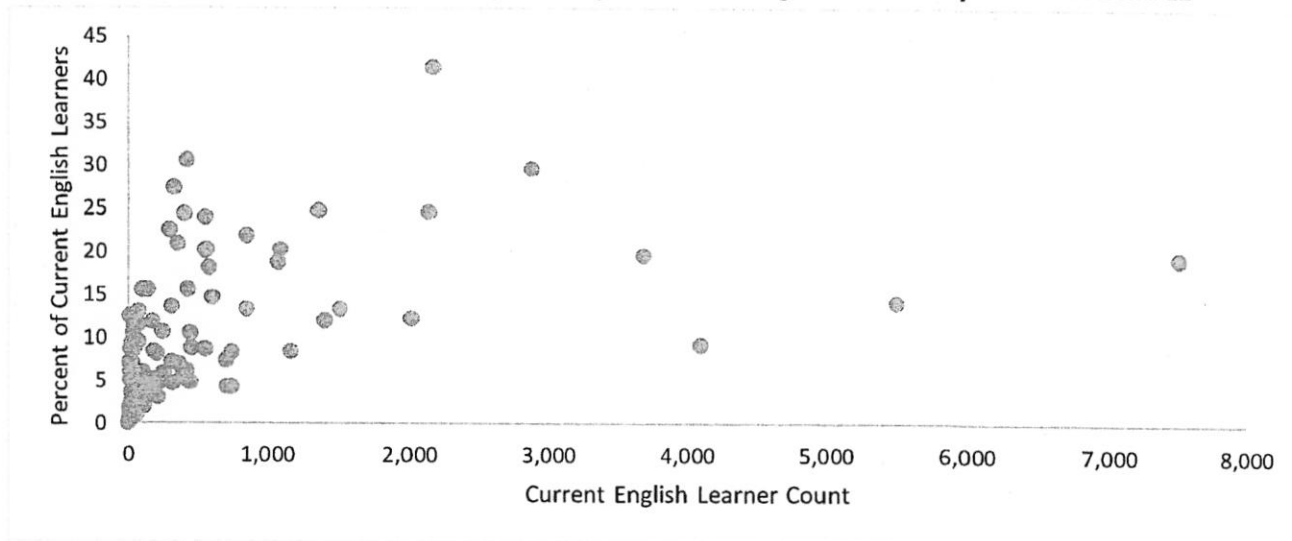
Statewide, about a quarter of Oregon districts ( $n = 46$ ) provided English language instruction, supports, and services to between 1 and 19 current English learners. This suggests these districts have too few current English learners to be independently eligible for specific improvement efforts under state and federal

## English Learners in Oregon

accountability initiatives. However, such districts can always form or join a consortium of districts to become eligible for the improvement efforts under state and federal accountability initiatives.

A sizable proportion of Oregon districts did not have any current English learner enrollments in 2021-22. The 47 districts not currently serving English learners tended to be small in overall population (median 142 students).

**Figure 4. Comparison of the number and percentage of current English learners by district in 2021-22**



This variation across districts is also evident in table 1, which shows the ten districts with the highest numbers of current English learners.

**Table 1. Districts with the highest number of current English learners in 2021-22**

District Name	Number of Current English Learners
Salem-Keizer SD	7,499
Beaverton SD	5,510
Portland SD	4,100
Hillsboro SD	3,693
Reynolds SD	2,878
Woodburn SD	2,173
David Douglas SD	2,140
North Clackamas SD	2,012
Gresham-Barlow SD	1,505
Tigard-Tualatin SD	1,404

In addition, table 2 shows the 10 districts with the highest percentage of current English learners. Note that Woodburn and Reynolds appear on both lists.

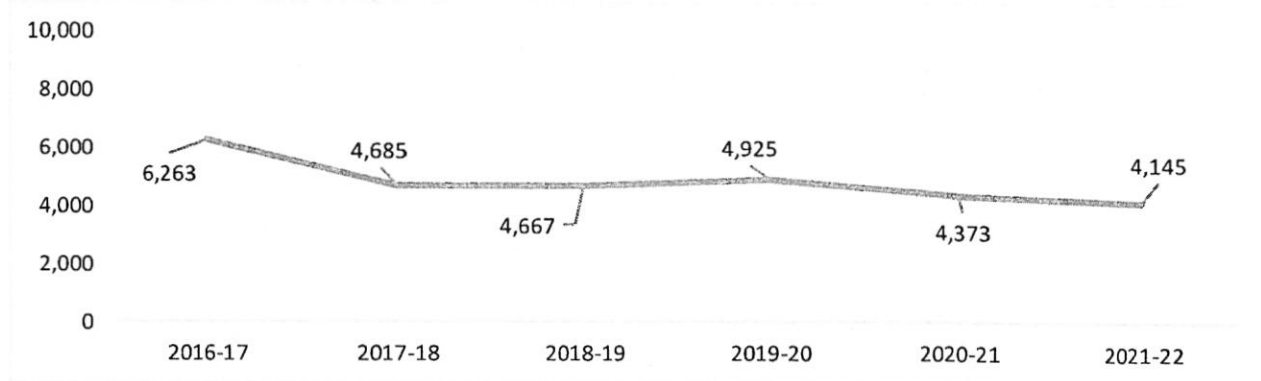
**Table 2. Districts with the highest percentage of current English learners in 2021-22**

District Name	Percentage of Current English Learners
Woodburn SD	41.5%
Umatilla SD	30.7%
Reynolds SD	29.7%
Nyssa SD	27.5%
Centennial SD	24.8%
David Douglas SD	24.6%
Milton-Freewater Unified SD	24.4%
Morrow SD	24.0%
Gervais SD	22.5%
Hood River County SD	21.8%

**The number of recent arrivers declined in 2021-22.**

The term recent arrivers refers to students who were born outside of the U.S. and Puerto Rico, and who have been educated in the U.S. for fewer than three cumulative years (i.e., these students are recent immigrants). They can be current, former, or never English learners; however, the majority are current English learners.

In 2021-22, 4,145 current English learners were recent arrivers. This number represents the smallest count of recent arrivers over the last six years and continues the reduction (likely due to the COVID pandemic) from 2019-20 (4,925; see figure 5).

**Figure 5. Number of current English learners who were recent arrivers in Oregon (2016-17 to 2021-22)**

Most recent arrivers (60.1%) were in the elementary grades, while 16.5 percent were in grades 6-8 and 22.4 percent were in high school. Current English learners who are recent arrivers in middle and high school contend with significant challenges, since they have to learn the language while also using English-language textbooks and lectures to learn the content of their courses in a variety of subject areas (Short &

## English Learners in Oregon

Fitzsimmons, 2007). Recent arrivers in the secondary grades are known as adolescent newcomers, and districts sometimes design specialized programs to serve their unique language and cultural needs.

Statewide, the total number of current English learners who were adolescent newcomers in 2021-22 was 1,614. Not all districts provided English language instruction, support, and services to adolescent newcomers; however, five Oregon districts with the largest population of such students in 2021-22 are shown in Table 3.

**Table 3. Districts with the largest population of adolescent newcomers in 2021-22**

District	Number of Adolescent Newcomers (Recently Arrived Current English Learners in Middle or High School)
Beaverton SD 48J	254
Salem-Keizer SD 24J	166
Reynolds SD 7	120
David Douglas SD 40	100
Portland SD 1J	83

### **In 2021-22, districts reported 795 current English learners had experienced interruptions in their education.**

Some current and former English learners had their education interrupted or received limited formal education before arriving in the U.S. school system. Often, these were immigrant or refugee students who had spent time in refugee camps or whose process of immigration to the U.S. prevented them from attending school for a time. These students are known as students with limited or interrupted formal education (often abbreviated as SIFE or SLIFE). Students are SLIFE if they are immigrant students or English learners who enter school in the U.S. after grade two and experience all of the following:

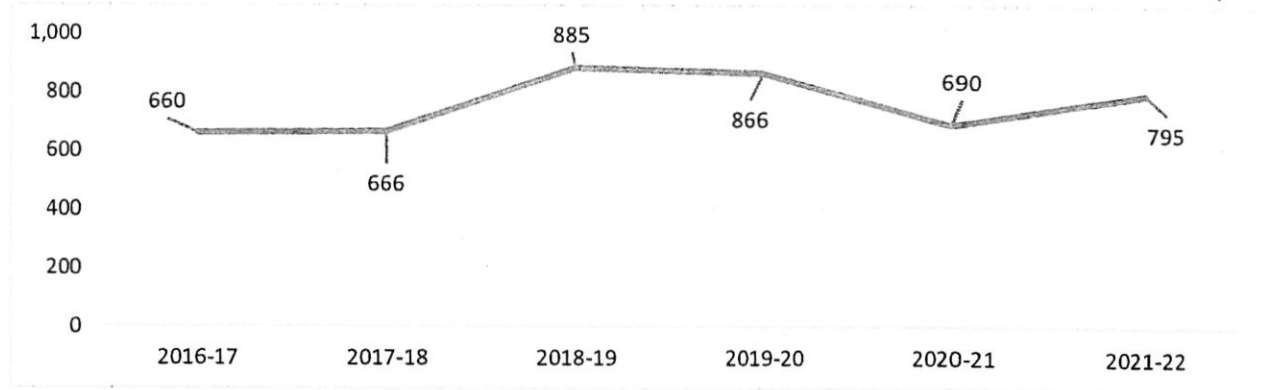
- a. Have at least two fewer years of schooling than their peers of the same age,
- b. Function at least two years below grade level expectations in reading and mathematics, and
- c. Are preliterate in their native language.<sup>5</sup>

SLIFE students face unique circumstances. In addition to having missed at least two years of schooling, some arrive having experienced significant trauma. Schools need to find ways to serve SLIFE students without placing them in classes with younger students, since forming relationships with peers, including never English learner peers, is a factor that appears to improve academic outcomes (Browder, 2014).

The ODE began collecting data on the number of students with limited or interrupted formal education in 2015-16. For the 2021-22 school year, districts reported 795 current English learners with limited or interrupted formal education (about 1.4 percent of all current English learners). As figure 6 illustrates, the number of students with limited or interrupted formal education increased from 2016-17 to 2019-20 but decreased in 2020-21 and once again increased in 2021-22.

<sup>5</sup> See [ESEA Title III English Learner Definitions](#) for more details.

## English Learners in Oregon

**Figure 6. Number of current English learners with an interrupted formal education (2016-17 to 2021-22)**

Most students with limited or interrupted formal education were in high school (60.8%). Another 27.7 percent were in the middle school grades (grades 6-8), and only 11.6 percent were in the elementary grades.

In 2021-22, the distribution of current English learners with limited or interrupted formal education was not uniform across Oregon districts. Instead, current English learners with limited or interrupted formal education were, for the most part, concentrated in a few districts. Eight districts in Oregon, identified in table 4, provided English language instruction, supports, and services to at least 20 current English learners with limited or interrupted formal education in 2021-22. These eight districts alone enrolled 81 percent of all SLIFE students in Oregon. Note that three of the eight districts serving many adolescent newcomers (see table 3) also enroll a significant numbers of current English learners with interrupted formal education (i.e., Portland, Beaverton, and Reynolds).

**Table 4. Districts serving at least 20 current English learners with interrupted formal education in 2021-22**

District	Number of Current English Learners with Limited or Interrupted Formal Education
Hillsboro SD 1J	235
Hermiston SD 8	106
Portland SD 1J	81
Beaverton SD 48J	70
Reynolds SD 7	56
Woodburn SD 103	45
Morrow SD 1	30
South Lane SD 45J3	21

**Current English learners across the state spoke 199 unique home languages.**

Statewide, current English learners spoke about 199 different languages at home. By far the most prevalent home language among Oregon current English learners was Spanish, spoken at home by 76.3 percent of all current English learners. The four next most common languages were Russian, Vietnamese, Chinese, and Arabic. Taken together, these top five languages represent 84.7 percent of home languages among current English learners (see table 5). In recent years, the number of current English learners speaking Somali, Mesoamerican languages, and other languages has been increasing.

## English Learners in Oregon

In 2020, ODE expanded the language of origin reporting options to include an additional 384 languages; many of which were Mesoamerican languages such as Mam, Q'anjobal, and K'iche. This was intended to reduce the prevalence of districts reporting an unknown home language. However, in 2021-22, districts reported an unidentified home language for 1,348 students, suggesting a need for more training and support in this area.

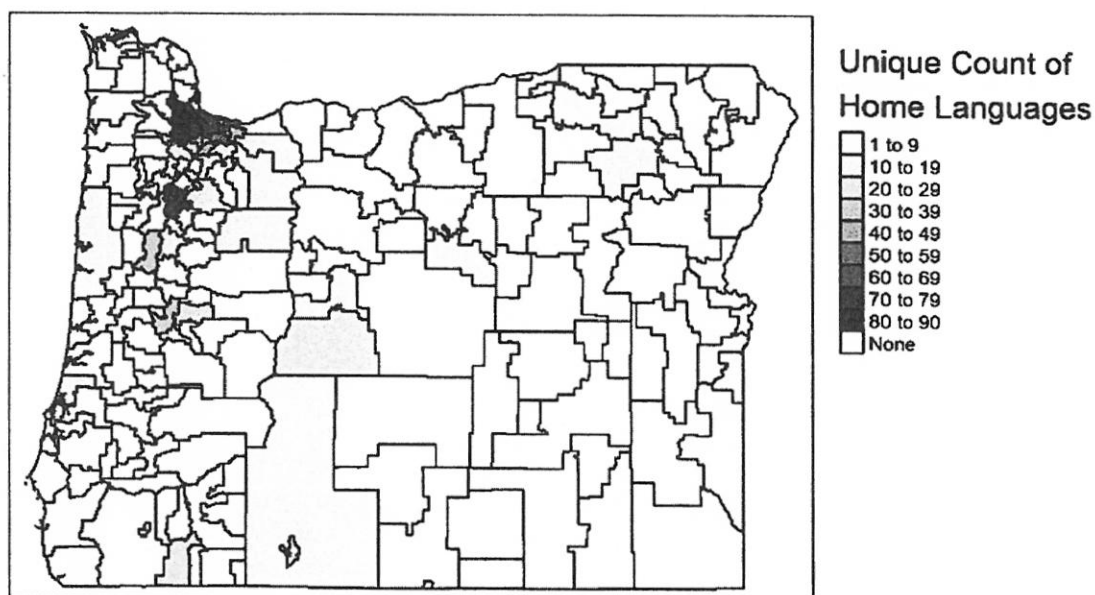
**Table 5. Most prevalent home languages among current English learners in 2021-22**

Language	Number of Current English Learners with this Language	Percentage of Current English Learners with this Language
Spanish	43,419	76.6%
Russian	1,345	2.37%
Vietnamese	1,251	2.21%
Chinese	1,200	2.12%
Arabic	830	1.46%
Chuukese	688	1.21%
Somali	600	1.06%
English <sup>6</sup>	561	0.99%
Ukrainian	417	0.74%
Japanese	367	0.65%
Marshallese	352	0.62%
Korean	269	0.47%

Home languages other than Spanish tend to concentrate in a few districts. Figure 6 provides a map illustrating the number of different home languages in different Oregon districts. A few districts, mostly in the Portland metropolitan area and Salem, provide English language instruction, supports, and services to students with over 60 unique home languages.

<sup>6</sup> All 561 current English Learners with English as the home language were American Indian/Alaska Native students.

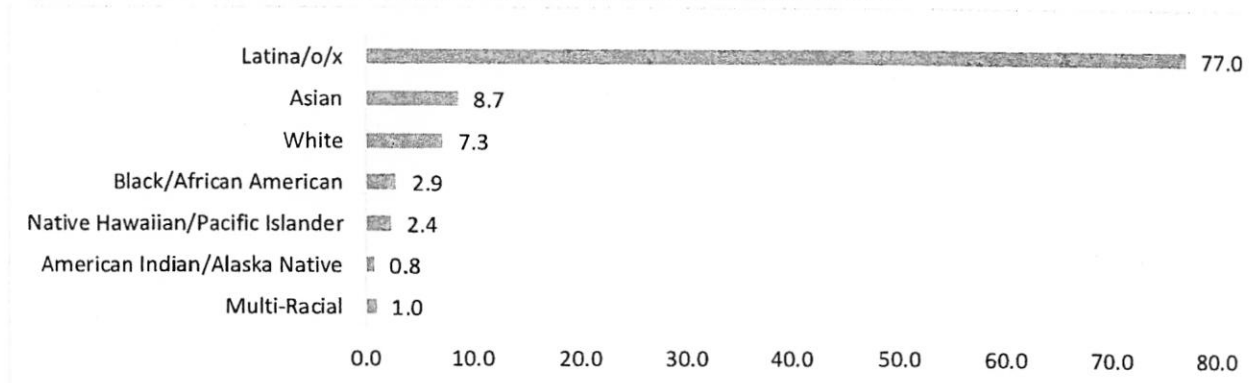
**Figure 7. Geographic distribution current English learner home languages across Oregon districts during 2021-22**



**The vast majority of current English learners were Latina/o/x.**

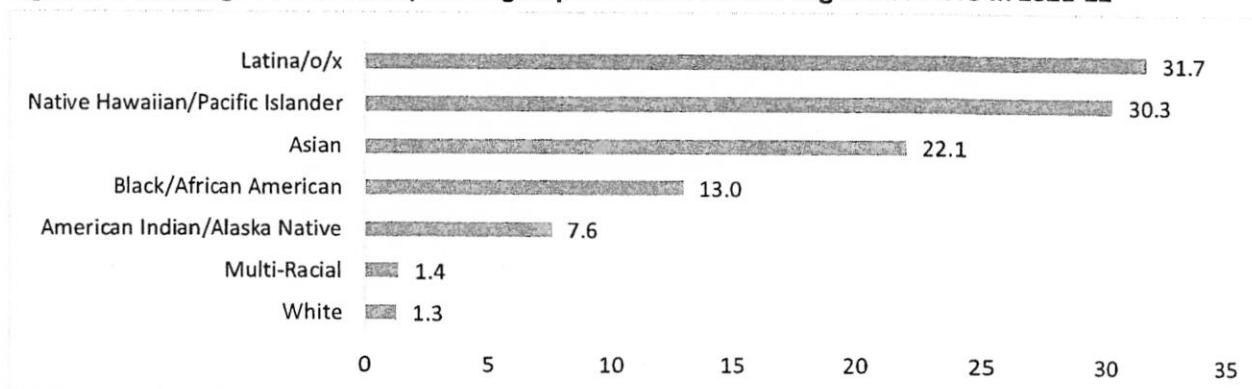
Of the 56,683 current English learners in Oregon during the 2021-22 school year, 43,629 (77%) were Latina/o/x. About 7.3 percent were White and 8.6 were Asian, while smaller percentages were Black/African American, Native Hawaiian/Pacific Islander, American Indian/Alaska Native, and Multi-Racial (see figure 8).

**Figure 8. Percentage of current English learners by race/ethnicity in 2021-22**



It is important to note that most Latina/o/x students in Oregon were not current English learners. In fact, according to figure 9, only 31.7 percent of Latina/o/x students were current English learners in 2021-22. Moreover, 30.3 percent of Native Hawaiian/Pacific Islander students were current English learners.



**Figure 9. Percentage of each racial/ethnic group who were current English learners in 2021-22**

## Section 2: Participation in Targeted Programs

Schools and districts deliver a range of programs that aim to address the needs of particular groups of students. These include free or reduced price meals, special education, migrant education, and TAG programs. Most of these programs receive some federal funding; however, TAG programs receive only state funding. This section of the report describes the participation of English learners in each of these programs during the 2021-22 school year.

### Free or Reduced Price Meals

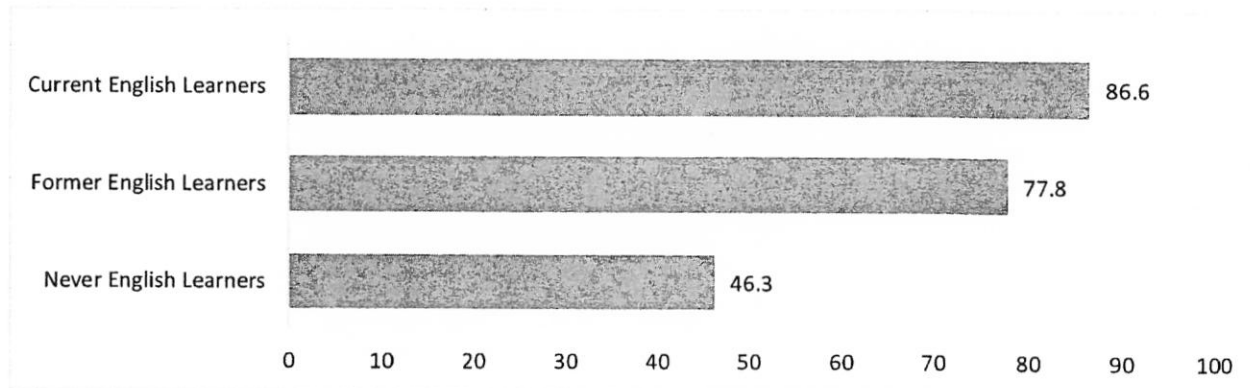
Students who come from low-income families (those earning below 185 percent of the federal poverty line) are eligible for free or reduced price meals. The percentage of students receiving free or reduced price meals is an estimate of the level of poverty or economic disadvantage in a school. It is an imprecise measure, since some eligible students and families never apply to the program; however, it provides the best data currently available to compare poverty and economic disadvantage levels across schools and districts.

However, as mentioned in the statewide annual report card (2022), “due to COVID-19, USDA issued a suite of waivers for the School Nutrition Program for the 2020-21 and 2021-22 school years that allowed meals to be served at no cost to all children and eliminated the need for schools to collect Free and Reduced Price Lunch eligibility data. Therefore, there is no accurate eligibility data available for 2021-22” (p. 54).

As a reminder, however, the latest data prior to the COVID-19 pandemic (2019-20) are provided in figure 10. According to the figure, current and former English learners were much more likely than never English learners to be eligible for free or reduced price meals. This suggested that households for current and former English learners were more likely to experience poverty and economic disadvantage. Overall, 86.6 percent of current English learners came from economically disadvantaged households.



**Figure 10. Percentage of current, former, and never English learners receiving free or reduced price meals in 2019-20**



## Special Education

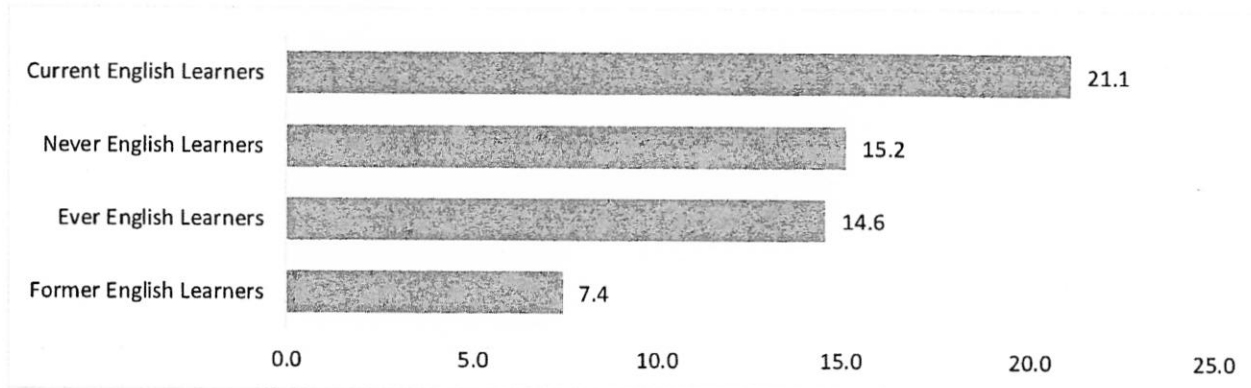
Students who are current English learners and receive special education services and supports are known as dual-identified students, since they receive instruction, supports, and services from two programs (i.e., English language and special education).

There is concern in the field about the difficulty of accurately identifying current English learners who need special education services and supports. Schools may incorrectly identify current English learners as having a learning disability when, in fact, it is their developing English proficiency that adversely influences their educational progress. On the other hand, some schools may overlook genuine disabilities, assuming that current English learners just need more time to learn English. Both identification challenges are prevalent not only in Oregon but across the United States (Artiles & Ortiz, 2002; Hamayan, Marler, Sanchez Lopez & Damico, 2007; Umansky, Thompson, & Díaz, 2017).

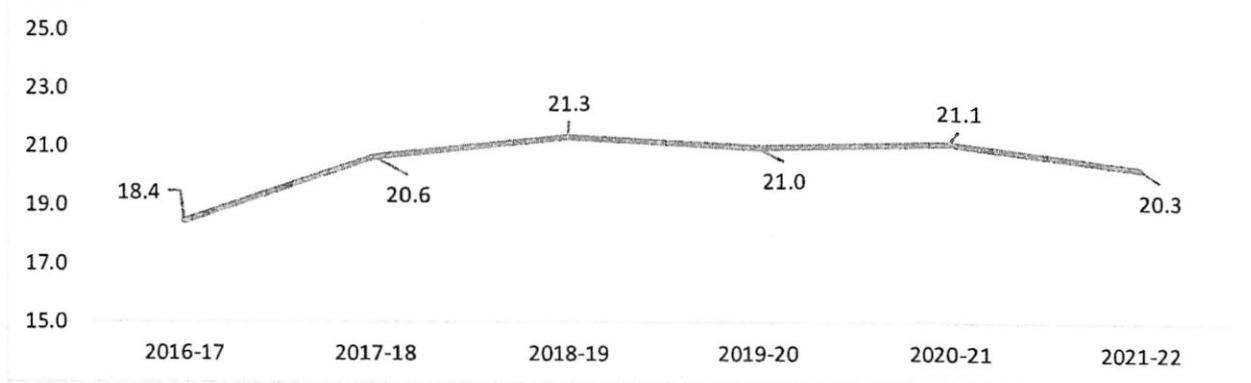
## Ever English learners and never English learners received special education services and supports at about the same rate.

As figure 11 illustrates, a far higher rate of current English learners (21.1%) received special education services and supports as compared to former (7.4%) and never English learners (15.2%). However, the percentage of ever English learners (the combination of current and former English learners) receiving services and supports is very similar to that for never English learners.

## English Learners in Oregon

**Figure 11. Percentage of current, former, never, and ever English learners receiving special education services and supports in 2021-22****The percentage of current English learners receiving special education remained consistent in 2021-22.**

In 2021-22, 11,508 current English learners (20.3%) were receiving special education supports and services. The number of current English learners receiving special education services and supports in 2021-22 represents a slight decrease from the year before, when 21.1 percent of current English learners received special education services and supports (see figure 12).

**Figure 12. Percentage of current English learners receiving special education services and supports (2016-17 to 2021-22)**

Most English learners with a disability in 2021-22 had a specific learning disability (3,590 students) or a speech or communication disorder (2,992 students) as their primary disability.<sup>7</sup> Other primary disabilities, in order of frequency in 2021-22, included other health impairments, autism, intellectual disability, emotional behavior disability, deaf or hard of hearing, orthopedic impairment, visual impairments including blindness, traumatic brain injury, and deaf-blindness.

<sup>7</sup> A specific learning disability refers to a disorder in one or more of the basic psychological processes involved in understanding or using language that may manifest itself in difficulties in listening, thinking, speaking, reading, writing, spelling, or doing math calculations. A speech or language impairment refers to a communication disorder such as stuttering, impaired articulation, or a language or voice impairment that adversely affects a students' learning or educational performance.

## Migrant Education

Some English learners also participate in migrant education programs. Students are eligible for migrant education programs if students aged 3-21 can qualify for the Title 1-C program, or/and if they or their parents are engaging in qualifying agricultural or fishing work, and they have moved within the past 36 months to obtain or seek this type of work. Many migrant children experienced poverty, and when they move, they confront the challenges of having to adjust to different teachers with different instructional approaches and materials, as well as building new social connections. The intent of migrant education programs is to ensure that migrant children receive the support that addresses their unique situations and are able to receive supports necessary to succeed academically.

### 9 percent of current English learners were eligible for Title 1-C Migrant Education Programs services in 2021-22.

Oregon has one of the largest migratory student populations nationally. Across the state in the 2021-22, 5,114 current English learners participated in migrant education programs. That number translates to 9.0 percent of all current English learners. It also means that more than half (51.4 percent) of the 9,947 students in migrant education programs were current English Learners in 2021-22. Moreover, 37.4 percent of students in migrant education programs in 2021-22 were former English learners. This also implies that 88.8 percent of the 9,947 students who received services from migrant education programs were ever English learners.<sup>8</sup>

Approximately 97 districts received federal funds in the 2021-22 school year to support their migrant education programs. Districts that did not receive federal funding in 2021-22 did not have eligible students enrolled in their schools and programs. Ten districts with the largest population of English learners participating in their migrant education program in 2021-22 (see table 6).

**Table 6. Districts with the largest number of English learners participating in migrant education programs in 2021-22**

District	Number of Current ELs in Migrant Education	District	Number of Current ELs in Migrant Education
Salem-Keizer SD 24J	513	Klamath County SD	164
Woodburn SD 103	426	Hood River County SD	149
Hillsboro SD 1J	386	Phoenix-Talent SD 4	145
Medford SD 549C	360	Eagle Point SD 9	142
Forest Grove SD 15	280	Beaverton SD 48J	138

## Talented and Gifted

The state requires that all school districts establish policies and procedures to identify students to participate in TAG programs. These students may have high general intelligence and/or demonstrate unusual academic ability in one or more particular areas. State law requires districts to develop a plan to provide programs and services beyond regular school programs in order to ensure that eligible students can develop and realize their potential (OAR 581-022-2500).

<sup>8</sup> The data for this portion of the report relies on student enrollments as of the first school day in May 2022.

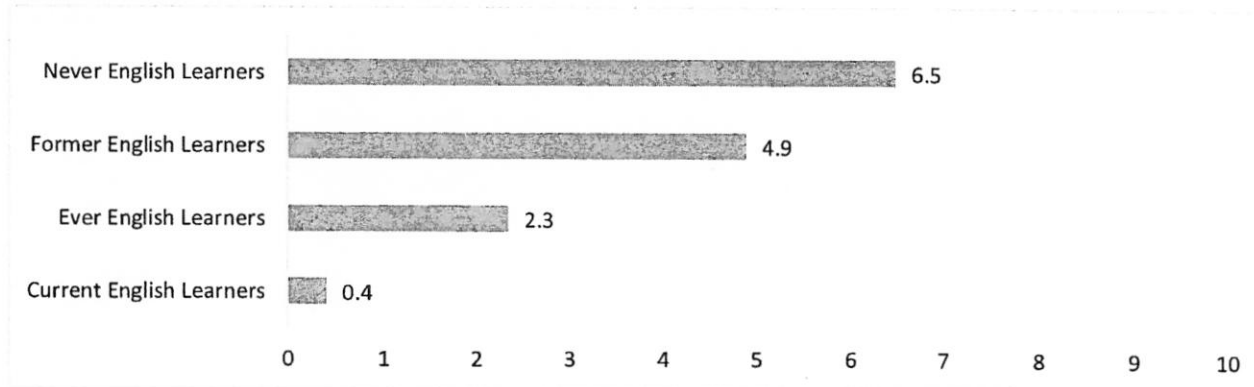
## English Learners in Oregon

Correctly identifying students for TAG programs and providing specialized services is important because these students may have both unique talents and face unique challenges. For example, some TAG students struggle with perfectionism and the ability to cope with failure. Others engage only selectively at school and have high levels of absenteeism. Recent findings from the ODE suggest that approximately 10 percent of TAG students drop out of high school (Allen, 2016).

### Current English Learners were rarely identified for TAG Programs.

According to figure 13, 6.5 percent of never English learners (29,092 students) were eligible for TAG programs in 2021-22. While 4.9 percent of former English learners were eligible (2,107 students) and 5.3 percent of ever English learners were eligible (2,336 students), less than 1 percent (0.4%) of current English learners were eligible for TAG programs in 2021-22 (229 students). Never English learners were over 16.2 times more likely to be eligible for TAG programs than current English learners in 2021-22.

**Figure 13. Percentage of current, former, ever, and never English learners who participated in a TAG program in 2021-22**



## Section 3: Language Development and Academic Outcomes for English Learners

Students who are current English learners have to develop proficiency in English. In addition and at the same time, they must learn all the same academic content as other students in Oregon. This section of the report provides data about English language proficiency and academic outcomes of current English learners (with comparisons to former, ever, and never English learners).

### Progress towards English Language Proficiency

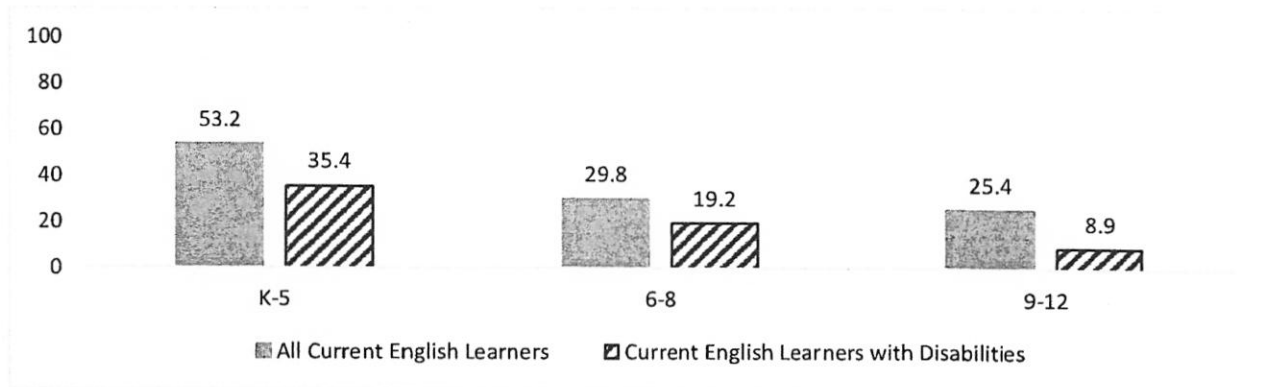
Title I-A of the Every Student Succeeds Act (ESSA) requires current English learners to take an English language proficiency assessment (ELPA) annually. The ELPA measures a student's proficiency in the domains of listening, reading, speaking, and writing. Students who demonstrate proficiency on all four ELPA domains are ready to exit the ELD program. Since 2017-18, the ODE monitors whether current English learners are on track to attain English language proficiency using a trajectory expectation model. Current English learners are on track if their current ELPA domain performance meets or exceeds trajectory expectations given (1) initial ELPA domain performance, (2) years identified as a current English learner, and (3) disability and/or an interrupted formal education status. These expectations are in line with trajectory expectations indicated by research on English learners (see Hakuta, Goto Butler, & Witt, 2000; Robinson Cimpian, Thompson, &

## English Learners in Oregon

Umansky, 2016; Umansky & Reardon, 2014), as well as SIFE, and dual-identified English learners (see Burke, Morita-Mullaney, & Singh, 2016; Conger, 2009; Kieffer & Parker, 2016; Thompson, 2015; Umansky & Reardon, 2014). Interested readers are also referred to the Oregon's ESSA Consolidated State Plan (2017) for Oregon's trajectory expectations (pp. 43-44).

According to figure 14, as the grade level increases, the percentage of current English learners on track to attain English language proficiency decreases from 53.2 percent in elementary school grades to 25.4 percent in high school grades. Furthermore, the same pattern is evident for current English learners with disabilities where the percentage decreases from 35.4 percent in elementary school grades to 8.9 percent in high school grades. To some extent, the decrease in the percentage of current English learners on track to attain English language proficiency from elementary to high school grades is not a surprise due to the annual exiting of current English learners. This has a considerable impact on the composition of current English learners across grade levels. Thus, inferences and comparisons across grade levels and between groups of current English learners (e.g., those with and without disabilities) must use caution.

**Figure 14. Percentage of all current English learners and current English learners with disabilities on track to attain English language proficiency by elementary (K-5), middle (6-8), and high school grades (9-12) in 2021-22**



### Long-term current English learners made up 21.2 percent of all current English learners.

Parents and communities have concerns about the ability of Oregon's schools and districts to ensure current English learners attain English language proficiency and exit an ELD program within an appropriate amount of time. Current English learners who are unable to meet proficiency expectations after a period of time are known as long-term current English Learners. The ODE defines a long-term current English learner as a student who receives English language instruction, supports, and services in an ELD program for more than seven years.

In 2021-22, most current English learners (78.8%) were not long-term current English learners; however, this means that 21.2 percent of current English learners received English language instruction, supports, and services for more than seven years. This is a concern because slower development of English language proficiency is highly predictive of other academic challenges (Menken & Kleyn, 2009; Danahy Ebert & Reilly, 2022). An important point to consider is the ability of Oregon's schools and districts to meet the needs of

current English learners. This is particularly salient given that 39.8 percent of current English learners with disabilities received English language instruction, supports, and services for more than seven years in 2021-22.

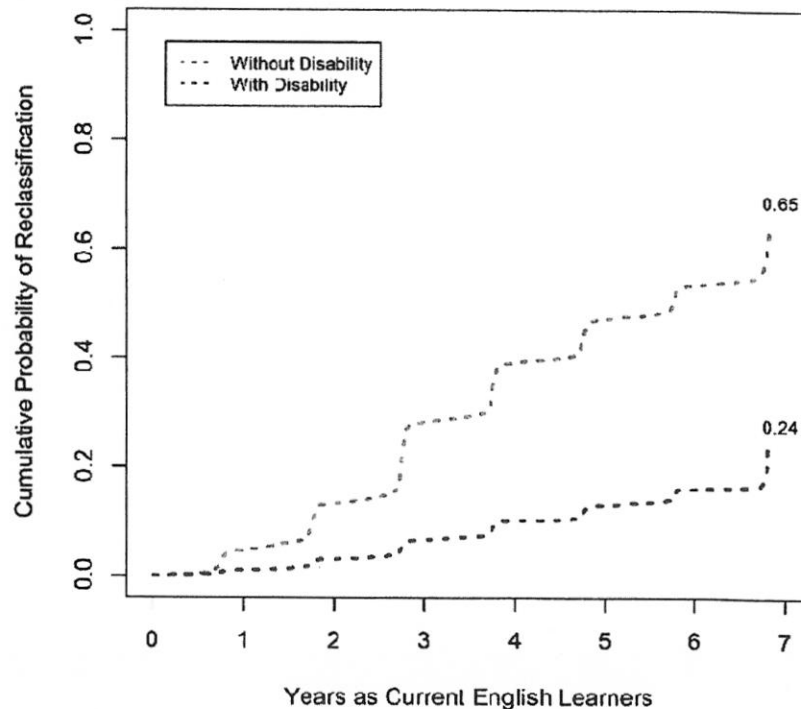
**Approximately 24 percent of current English learners receiving special education services and supports developed English language proficiency in six years.**

It is also useful to look at the development of English language proficiency from another angle, namely, what proportion of current English learners develop proficiency within a particular amount of time?

This measure uses data for all current English learners who received English language instruction, supports, and services in an ELD program in 2021-22 regardless of the length, start, or end of enrollment. While most of the data in this report rely on the first school day in May 2022 as a snapshot, this measure includes all current English learners (even those not enrolled on the first school day in May 2022).

Figure 15 addresses this question for current English learners with and without disabilities. For current English learners without disabilities who began receiving English language instruction, supports, and services on or after July 1, 2015, the probability of reclassification (i.e., attaining English language proficiency and exiting an ELD program) after six years is 0.65 (or, after multiplying by 100, 65%). That is, 65 percent of the current English learners without disabilities attained English language proficiency and exited an ELD program within six years. On the other hand, only 24 percent of current English learners with disabilities attained English language proficiency and exited an ELD program with six years. Succinctly put, ELs without a disability are, on average, over twice as much likely to exit the EL program within six years than their EL peers with a disability.

**Figure 15. Probability of reclassification for current English learners with and without disabilities within six years (July 1, 2016 to June 30, 2022)**





## Student Academic Outcomes in English Language Arts and Mathematics

Each year, all Oregon students in grades 3-8 and 11 take state assessments in English language arts and mathematics. These assessments, offered in English, may be especially challenging for ELs who are still developing proficiency. For both subjects, a performance level of three or higher meets the state standards.

### **Former ELs performed similarly or slightly below never ELs in English language arts, while few current ELs met or exceeded state standards.**

At the elementary level (grade 3-5), 7.0 percent of current ELs met or exceeded state standards in English language arts. In contrast, 50.5 percent of former ELs in elementary hit this benchmark. This was close to the percentage of never ELs meeting or exceeding standards, 47.8 percent. In fact in many districts (74), a higher percentage of former ELs, compared to never ELs, met benchmark in elementary English language arts.

At the middle school level (grades 6-8), 4.0 percent of current ELs met or exceeded state standards in English language arts. Additionally, 38.7 percent of former ELs and 48.5 percent of never ELs met or exceeded standards. In 39 districts, a higher percentage of former ELs, compared to never ELs, met benchmark.

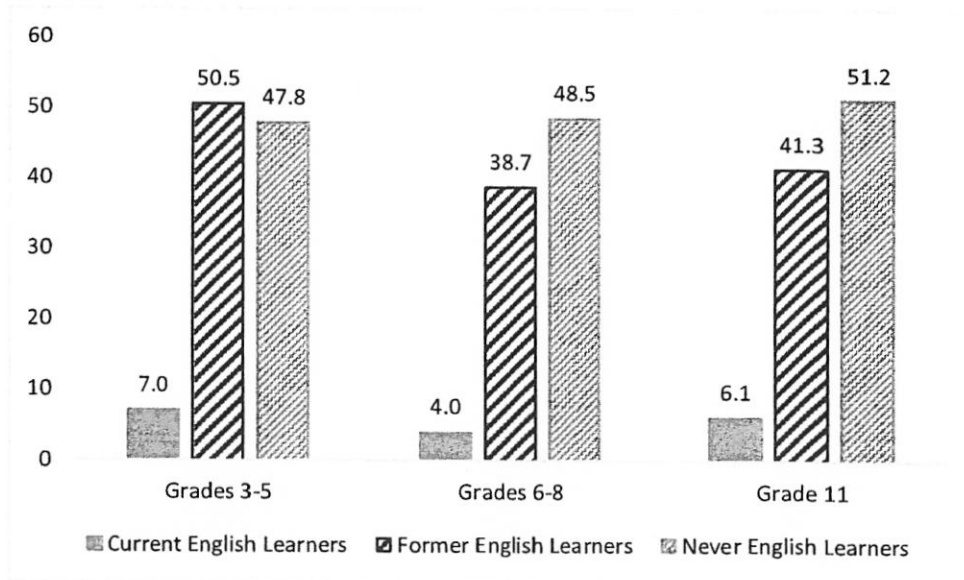
Among high school students (grade 11), 6.1 percent of current ELs, 41.3 percent for former ELs, and 51.2 percent of never ELs met or exceeded state standards. At the high school level, there were 39 districts<sup>9</sup> in which a higher percentage of former ELs than never ELs met the benchmark in English language arts.

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<sup>9</sup> These districts include: Baker SD, Gladstone SD, Astoria SD, Coquille SD, Bandon SD, Elkton SD, City SD, Phoenix-Talent SD, Ashland SD, Central Point SD, Eagle Point SD, Culver SD, Baker SD, Gladstone SD, Astoria SD, Coquille SD, Bandon SD, Elkton SD, Prairie City SD, Phoenix-Talent SD, Ashland SD, Central Point SD, Eagle Point SD, Culver SD, Three Rivers/Josephine County SD, Klamath, Falls City Schools, Klamath County SD, Fern Ridge SD, Creswell SD, Bethel SD, Siuslaw SD, Harrisburg SD, Scio SD, Santiam Canyon SD, Adrian SD, Vale SD, Gervais SD, Jefferson SD, Parkrose SD, Reynolds SD, Centennial SD, David Douglas SD, Dallas SD Milton-Freewater Unified SD, Stanfield SD, Powder SD, Gaston SD, Mitchell SD, Sheridan SD, Knappa SD, Lone SD.



**Figure 16. Percentage of current, former and never ELs meeting or exceeding state standards in English Language Arts in elementary, middle and high school, 2021-22<sup>10</sup>**



**In math, former ELs performed below never ELs, especially in middle and high school, while less than 10 percent of current EL met or exceeded state standards.**

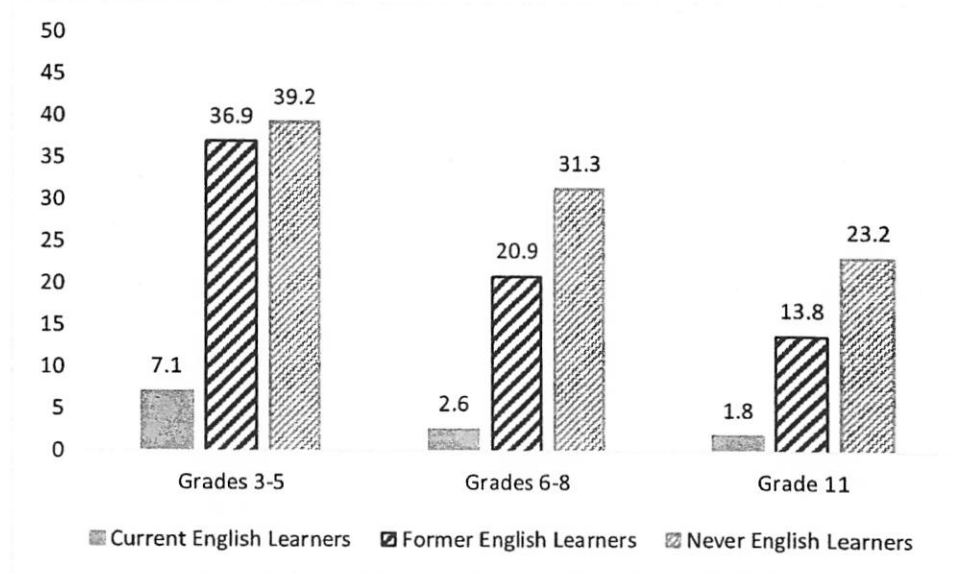
At the elementary level, 7.1 percent of current ELs met or exceeded standards in math (Figure 17). In addition, 36.9 percent of former ELs met or exceeded standards in math. The percentage of never ELs meeting or exceeding standards was somewhat higher, 39.2 percent.

Among middle school students, 2.6 percent of current ELs met or exceeded standards in math, compared to 20.9.2 percent of former ELs and 31.3 percent of never ELs.

Among students in grade 11, 1.8 percent of current ELs, 13.8 percent of former ELs, and 23.2 percent of never ELs met or exceeded standards in math. At all levels and among all groups, fewer students met or exceeded standards in math than in English language arts.

<sup>10</sup> In this chart, the group "current EL" includes only students who were classified as current ELs at the time of testing. In some other state accountability reports, the performance of current and recently reclassified ELs are reported together.

**Figure 17. Percentage of current, former and never ELs meeting or exceeding state standards in mathematics in elementary, middle and high school, 2021-22<sup>11</sup>**



## Section 4: Attendance, Progress toward Graduation, Graduation, and Beyond

This section of the report examines several important outcomes for English learners. These are attendance, ninth grade progress towards graduation, four-year graduation, earning a Seal of Biliteracy, and postsecondary enrollment.

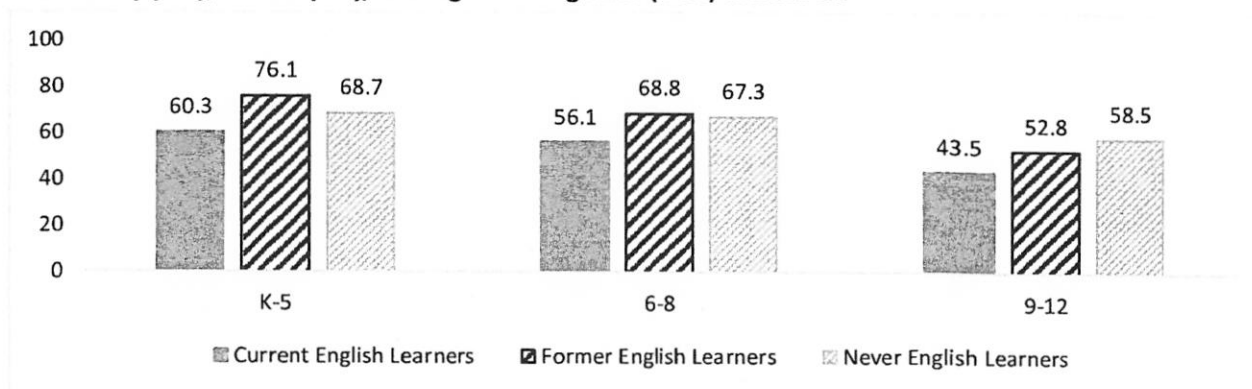
### Regular Attendance

In recent years, researchers and educators alike have devoted increasing attention to ensuring students attend school on a regular basis. Research has shown that even moderate levels of absenteeism can have a profound impact on students' grades, performance on standardized assessments, graduation rates, and success in college (Allensworth & Evans, 2016; Ginsburg, Jordan, & Chang, 2014). In Oregon, students exhibit "regular attendance" at school if they attend more than 90 percent of school days during the school year.

Among elementary grades in 2021-22, former and never English learners have the highest levels of regular attendance (see figure 18). Current English learners, on the other hand, have lower rates of regular attendance in elementary, middle, and high school grades. In fact, regular attendance rates decline considerably for current, former, and never English learners in middle and high school grades (with current and former English learners declining by approximately 17 and 23 percentage points between elementary and high school grades).

<sup>11</sup> Also in this chart, the group "current EL" includes only students who were classified as current ELs at the time of testing.

**Figure 18. Percentage of current, former, and never English learners regularly attending school by elementary (K-5), middle (6-8), and high school grades (9-12) in 2021-22**



## On Track to Graduate

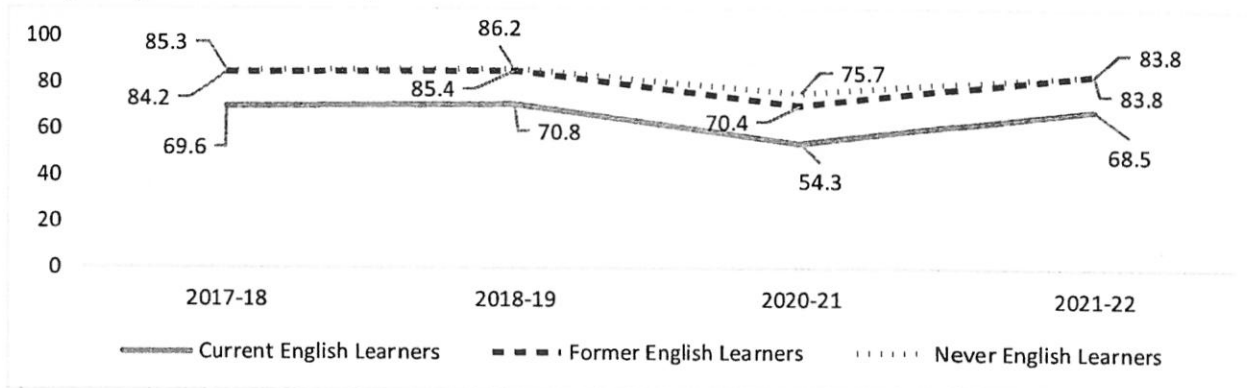
Around the country, states and districts track whether students in the 9<sup>th</sup> grade are on track to graduate within four years. They do this because ninth grade is a critical year for determining whether students will ultimately graduate from high school; identifying students who are not on track allows schools to provide supports and interventions to help keep students in school and progressing towards graduation. In Oregon, students in the 9<sup>th</sup> grade are on track to graduate if they earn at least six credits or 25 percent of the credits their district requires for graduation. However, one should note that ODE's data is limited to the number of credits earned and not the specific courses credits earned. From 2016-17 to 2021-22, a higher percentage of former and never English learners were on-track to graduate compared to current English learners.<sup>12</sup>

According to figure 19, former and never English learners in 9<sup>th</sup> grade are on track to graduate at substantially higher percentages than current English learners from 2017-18 to 2021-22. Former and never English learners have very similar percentages. Their gap shrinks from 1.1 percentage points in 2017-18 to 0.8 percentage points in 2018-19. Indeed, the gap between former and never English learners completely closes in 2021-22. From 2017-18 to 2018-19, current, former, and never English learners exhibited some improvement in the percentage of students on-track to graduate. Current English learners' rates improves by 1.2 percentage points. Despite a considerable decline in 2020-21 due to the impact of the COVID-19 pandemic, all three groups of students experience a sizeable improvement in 2021-22 with the current and former English learners increasing by 14.2 and 13.4 percentage points since 2020-21. It must be noted also that as part of Senate Bill 744 passed in 2021, these students were not required to demonstrate proficiency for three of the nine essential skills as one of their non-credit graduation requirements.

<sup>12</sup> Data representing the percentage of current, former, and never English learners who were on track to graduate in ninth grade were not available during the 2019-20 school year. The reason for the unavailability is due to the State of Oregon's response to the COVID-19 pandemic (e.g., the cancellation of data collections that either capture the specific data or support the calculation of this measure at the district and state levels).

## English Learners in Oregon

**Figure 19. Percentage of 9<sup>th</sup> grade current, former, and never English learners on track to graduate within four years (2017-18 to 2021-22)**



### Four-Year Graduation

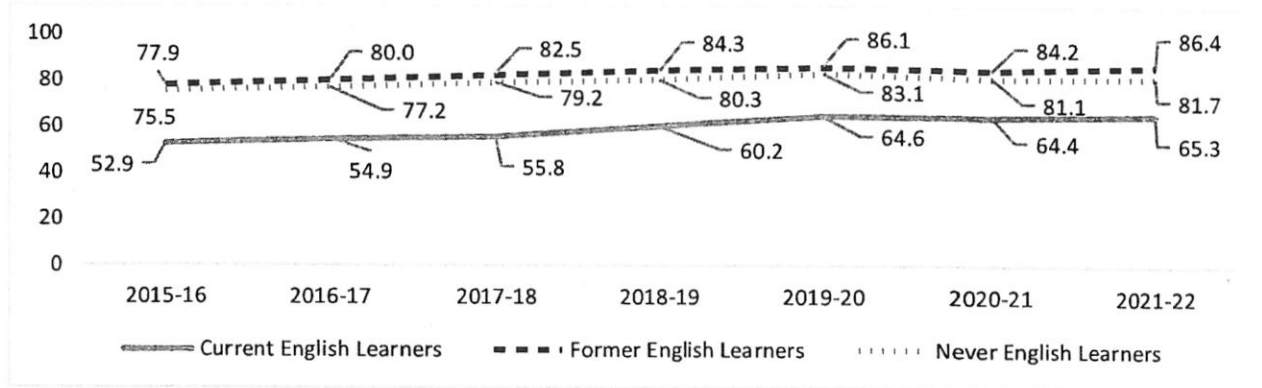
The ODE uses a cohort adjusted graduation rate to examine and monitor the percentage of students graduating within a specific number of years. The data for this section relies on the four-year cohort adjusted graduation rate for current, former, and never English learners. For the purposes of reporting graduation data to the public, current English learners are multilingual students who received English language instruction, supports, and services in an ELD program at any time during high school. Former English learners are multilingual students who attained English language proficiency and exited an ELD program prior to entering high school. Note that current English learners included students who were eligible to receive English language instruction, supports, and services in an ELD program but did not participate because their parents or guardians waived services. Lastly, never English learners are monolingual English or multilingual students who were not eligible to receive English language instruction, supports, and services in an ELD program at any time in grades kindergarten through twelve.

Former English learners graduated at rates similar to or better than never English learners; however, substantially fewer current English learners graduated in four years.

According to figure 20, former and never English learners graduate in four years at relatively similar rates; however, although similar, the rate for former English learners was higher from 2015-16 to 2021-22. Indeed, consistently since years 2015-16, the four-year graduation rate for former English learners was higher than the rate for never English learners.

Current English learners, on the other hand, graduated in four years at lower rates than former and never English learners; however, it is important to note that the four-year graduation rate for current English learners has grown considerably from 2015-16 to 2021-22 (an increase of 12.4 percentage points).

## English Learners in Oregon

**Figure 20. Percentage of current, former, and never English learners graduating within four years (2015-16 to 2021-22).**

### Current English learners graduating in four years were over 2.7 times more likely to receive a modified diploma

Modified diplomas are designed for students who meet certain criteria listed in OAR 581-022-2010. Modified diplomas require fewer credits to graduate compared to a regular high school diploma. Among the current English learners who graduated in four years in 2021-22 (i.e., 1,841 students), 202 students (11%) received a modified diploma (see table 7). By contrast, among the former English learners that graduated in 4 years in 2021-22 (i.e., 5,435 students), 117 students (2.2%) received a modified diploma. Finally, among the never English learners who graduated in four years in 2021-22 (i.e., 30,535 students), 1,216 students (4%) received a modified diploma.

In addition, among the students that graduated in four years in 2021-22, current English learners were more than 2.7 times (11 percent ÷ 4%) more likely to receive a modified diploma compared to that for never English learners. Indeed, this ratio increases to 3.4 times (15.4 percent ÷ 4.5%) for cohorts that graduated in five years.

**Table 7. Percentage of students receiving regular vs. modified diplomas**

Student (Diploma Type)	Four-Year Cohort	Five-Year Cohort
Current English Learners (Modified)	11%	15.4%
Former English Learners (Modified)	2.2%	2.7%
Never English Learners (Modified)	4.0%	4.5%
Current English Learners (Regular)	89.0%	84.6%
Former English Learners (Regular)	97.8%	97.3%
Never English Learners (Regular)	96.0%	95.5%

### Oregon State Seal of Biliteracy

The Seal of Biliteracy offers recognition of the many cognitive, academic, and economic benefits of bilingualism. Students can earn a Seal of Biliteracy on their diplomas if they meet the following requirements:

- Meet all graduation requirements, and

## English Learners in Oregon

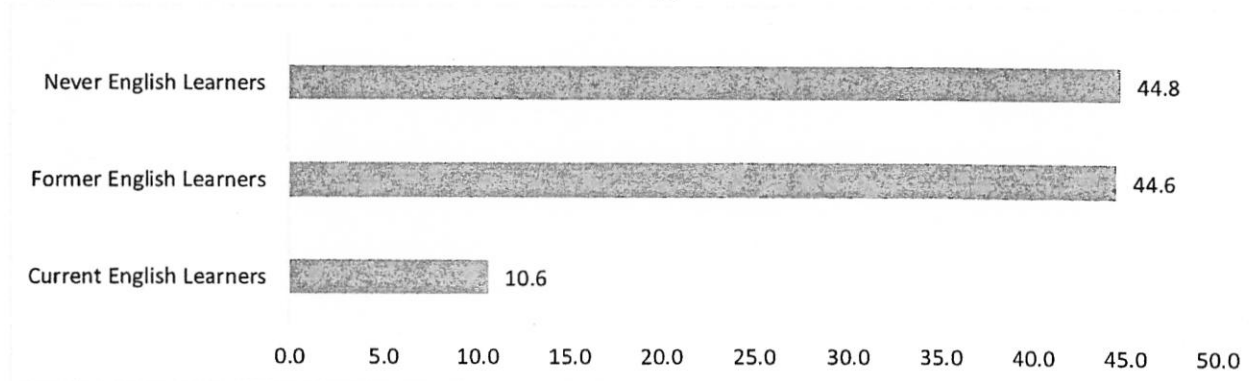
- score at the intermediate high level in listening, speaking, reading, and writing in a partner language.

The data for this section rely on students who graduated in 2021-22 (and were part of the four-year cohort adjusted graduation rate) as the denominator in calculations. Moreover, this section will examine the count and percentage of current, former, and never English learners<sup>13</sup> who earned the Seal of Biliteracy in 2021-22.

**The majority of students who earned the Seal of Biliteracy in 2021-22 were ever English learners and never English learners who are native speakers of languages in addition to English.**

Of the 37,814 students who graduated in 2021-22, 2,078 students (about 5.5%) also earned the Seal of Biliteracy. Among those 2,078 students, 44.8 percent were never English learners, 44.6 percent were former English learners, and 10.6 percent were current English learners (see figure 21). In other words, 55.2 percent of those who earned the Seal of Biliteracy were ever English learners. Note that the majority of students who earn the Seal of Biliteracy are (1) ever English learners and (2) never English learners who are native speakers of languages in addition to English.

**Figure 21. Percentage of current, former, and never English learners earning the Seal of Biliteracy in 2021-22 (among all students who earned the Seal of Biliteracy)**

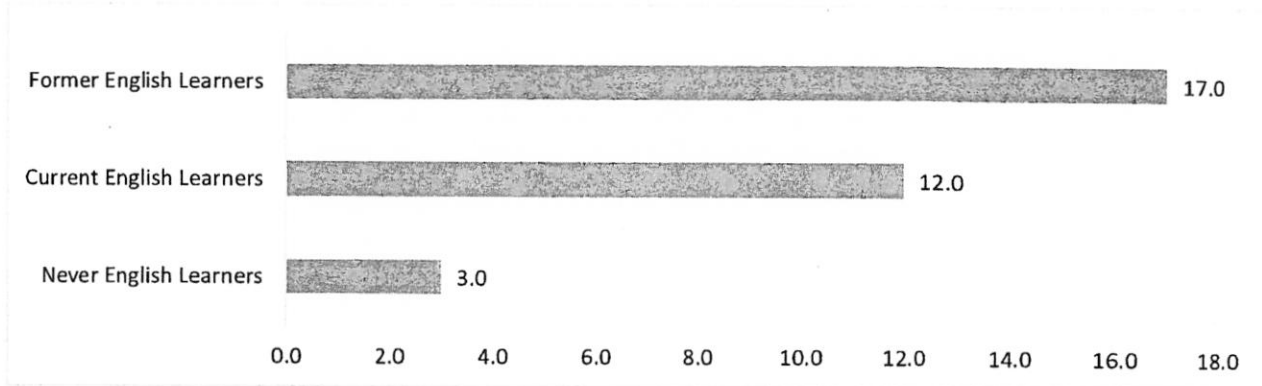


According to figure 22, among former English learners who graduated in 2021-22, 17 percent earned the Seal of Biliteracy. Moreover, 12 percent of current English learner graduates earned the Seal of Biliteracy in 2021-22. This means that, among ever English learners who graduated in 2021-22, 29 percent also earned the Seal of Biliteracy.

<sup>13</sup> For the purposes of reporting Seal of Biliteracy data in this report, current English learners are multilingual students who received English language instruction, supports, and services in an ELD program at any time during high school. Note that current English learners included students who were eligible to receive English language instruction, supports, and services in an ELD program but did not participate because their parents or guardians waived services. Former English learners are multilingual students who attained English language proficiency and exited an ELD program prior to entering high school. Lastly, never English learners are monolingual English or multilingual students who were not eligible to receive English language instruction, supports, and services in an ELD program at any time in grades kindergarten through twelve.



**Figure 22. Percentage of current, former, and never English learners earning the Seal of Biliteracy in 2021-22 (among current, former, and never English learner graduates)**



**Students earned the Seal of Biliteracy for their knowledge of 20 different partner languages; however, Spanish was the most common partner language.**

More than three-quarters of students earning the Seal of Biliteracy (78.2%) had Spanish as their partner language. The next three partner languages, in order of the number of students, were French, Chinese, and Korean, all with 50 or more students earning the Seal of Biliteracy in that language. Spanish, Chinese, Korean, and Russian were the partner languages with the most current and former English learners earning the Seal of Biliteracy. On the other hand, the top three partner languages among never English learners who earned the Seal of Biliteracy in 2021-22 were Spanish, French, Japanese, and Chinese.

**Nine districts had 50 or more students earning the Seal of Biliteracy.**

In 2021-22, nine districts had 50 or more students earning the Seal of Biliteracy (see table 7). Moreover, among Woodburn's students who graduated in 2021-22, 53.6 percent earned the Seal of Biliteracy. Three other districts in 2021-22 had 10 percent or more of their high school graduates earning the Seal of Biliteracy.

**Table 7. Districts with 50 or more students earning the Seal of Biliteracy in 2021-22<sup>14</sup>**

District	Number of Students	District	Number of Students
Portland SD 1J	344	Corvallis SD 509J	91
Beaverton SD 48J	330	North Clackamas SD 12	81
Salem-Keizer SD 24J	193	Hillsboro SD 1J	79
Woodburn SD 103	156	West Linn-Wilsonville SD 3J	68
Eugene SD 4J	93		

**Postsecondary Enrollment**

The ODE annually examines and publicly reports the percentage of high school graduates who enroll in postsecondary education institutions in Oregon and across the U.S. (e.g., public and private, 2-year and 4-

<sup>14</sup> Note that the counts in this table reflect students who graduated in 2021-22 (and were part of the four-year cohort adjusted graduation rate) and earned the Seal of Biliteracy. There were students who earned the Seal of Biliteracy in 2021-22 but were part of the five-year cohort or another cohort.



year, etc.). A postsecondary education affords students a wide range of advantages, including greater employment opportunities, financial security, opportunities to contribute in their community, and greater life satisfaction. The data for this measure uses students who graduated in 2018-19 (and were part of the four-year cohort adjusted graduation rate) as the denominator in calculations.<sup>15</sup> Moreover, this portion of the report will examine the count and percentage of current, former, and never English learners<sup>16</sup> who enrolled in a postsecondary education institution within 16 months after graduation.

**Never English learners were more likely to enroll in postsecondary education institutions than current English learners; however, former English learners had comparable postsecondary enrollment rates as never English learners.**

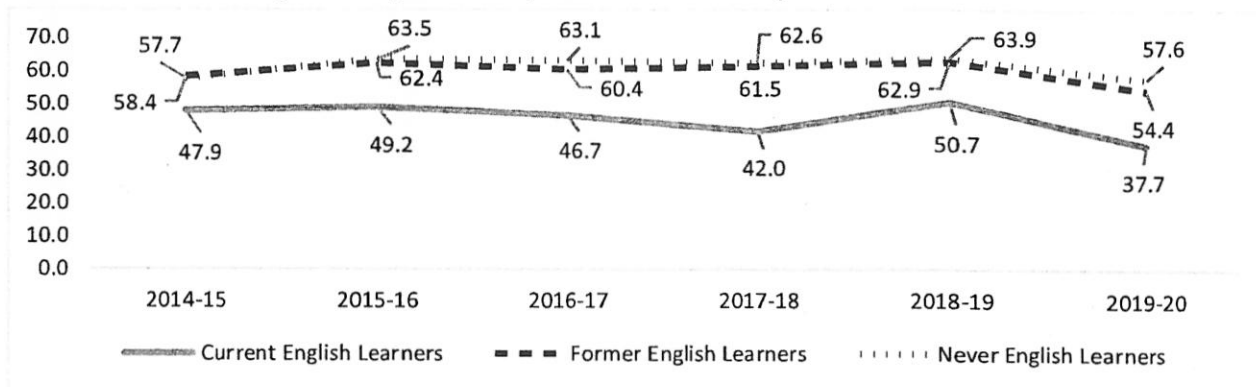
Figure 23 shows the postsecondary enrollment rates by graduation year for three groups of Oregon students. The postsecondary enrollment rates for never English learners, represented by the gray dotted line, ranged from 57.7 to 57.6 percent from 2014-15 to 2019-20. The salmon line displays the same information for students who were current English Learners. Current English learners enrolled in postsecondary institutions at substantially lower rates than never and former English learners. The postsecondary enrollment rates for current English learners annually increased from 47.9 percent in 2014-15 to 49.2 percent in 2015-16; however, they decreased in both 2016-17 and 2018-19 to levels similar to 2014-15. The black dashed line shows the postsecondary enrollment rates for former English learners. The postsecondary enrollment rates for former English learners increased from 58.4 percent in 2014-15 to 62.4 percent in 2015-16. Moreover, since 2015-16, former English learners had postsecondary enrollment rates that were reasonably comparable to never English learners.

<sup>15</sup> Post-secondary enrollment data for current, former, and never English learners who graduated from high school in 2019-20 were unavailable as of the publication of this report.

<sup>16</sup> For the purposes of reporting post-secondary enrollment data in this report, current English learners are multilingual students who received English language instruction, supports, and services in an ELD program at any time during high school. Note that current English learners included students who were eligible to receive English language instruction, supports, and services in an ELD program but did not participate because their parents or guardians waived services. Former English learners are multilingual students who attained English language proficiency and exited an ELD program prior to entering high school. Lastly, never English learners are monolingual English or multilingual students who were not eligible to receive English language instruction, supports, and services in an ELD program at any time in grades kindergarten through twelve.

## English Learners in Oregon

**Figure 23. Percentage of current, former, and never English learners enrolling in postsecondary institutions within 16 months of high school graduation (2014-15 to 2019-20<sup>17</sup>)**



## Section 5: State Revenues and Expenditures for Current English Learners

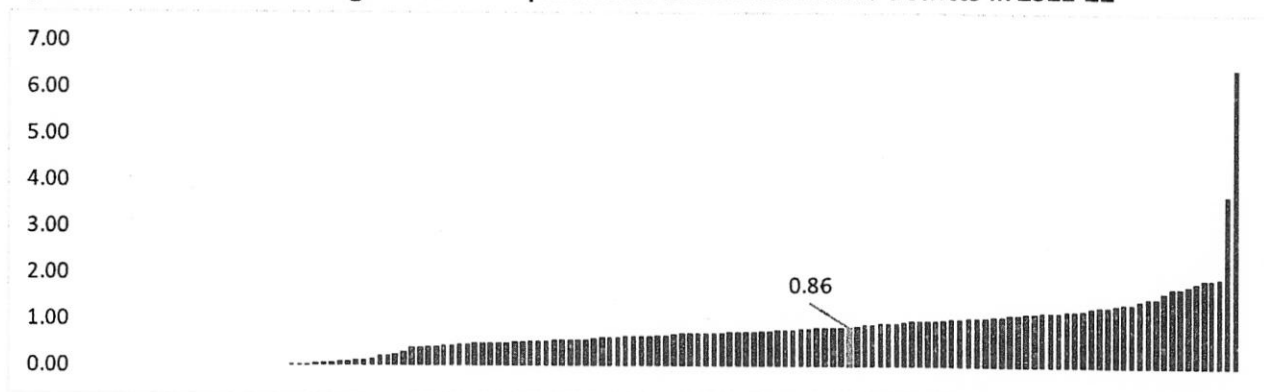
Each year, Oregon's State School Fund provides funding to districts through General Purpose Grants. The amount of the grant relies on a formula that considers the number of students in the district (known as average daily membership weighted or ADMw). On average, the per-pupil funding amount in 2021-22 was \$9,167.<sup>18</sup> In addition to this basic funding, districts receive additional state funds for each student enrolled in an ELD program. This amount is  $0.5 \times \$9,167$  or \$4,584 per current English learner. Altogether, the state allocated \$228,013,853 for these additional English learner funds in the 2021-22 school year.

Figure 24 depicts the relationship between current English learner revenues the state allocated to districts via the State School Fund Formula and the total current English learner expenditures from the General Fund expressed as a ratio. Statewide, the ratio of expenditures to revenues in 2021-22 was 0.86, meaning that district expenditures on current English learners reflected 86 percent of the funds the state allocated to districts via the State School Fund Formula. Some districts spent more than this percentage (up to 644%), while others reported spending less (as little as 0%). The values on the extreme ends of the range, however, may reflect variations in the way that some districts report data. Some districts with few current English learners report revenue received from the state, but do not identify expenditures specific to current English learners, even though they may expend funds for English learner services. Other districts on the high end of the spending ratio may include expenses for dual-language programs that also educate former and never English learners, rather than calculating the percentage spent solely on current English learners.

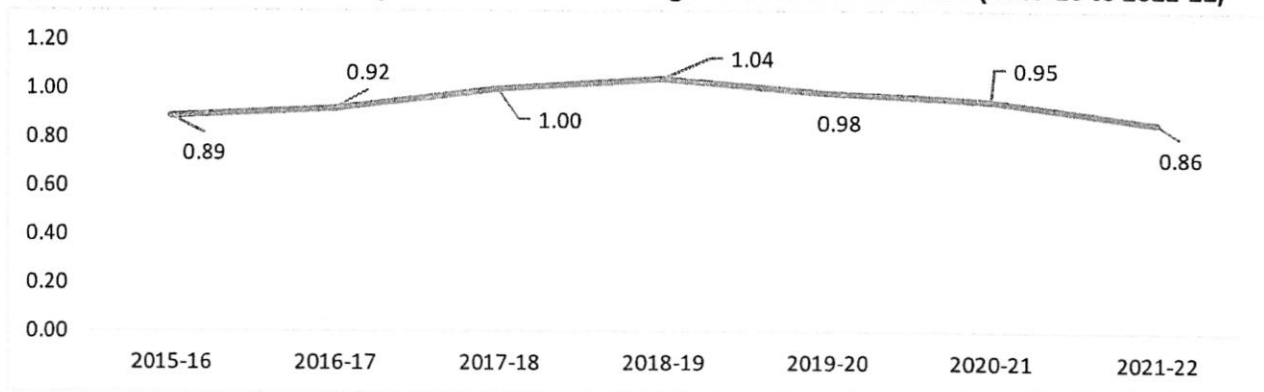
<sup>17</sup> The year (e.g., 2019-20) represents the school year in which students graduated from high school.

<sup>18</sup> While \$9,167 is the average amount, the grant amount can vary a bit for different districts because of the way the formula is set up.

## English Learners in Oregon

**Figure 24. Ratio of current English learner expenditures to revenues across districts in 2021-22**

As figure 25 illustrates, the statewide ratio increased steadily from 2015-16 to 2018-19; however, in 2019-20 through 2021-22, the ratio decreased below 1.0.

**Figure 25. Ratio of statewide expenditures on current English learners to revenues (2015-16 to 2021-22)**

Expenditures from the General Fund on current English learners either belong to Function 1291 (covering expenditures for instruction and interventions to help current English learners learn English) or Area of Responsibility 280 (other supports for current English learners, such as interpretation services or transportation).<sup>19</sup>

Current English learner expenditures for 2021-22 totaled \$196,738,499. Districts accounted for approximately 83.3 percent of the expenditures (\$163,859,331) using Function 1291 and 16.7 percent of the expenditures (\$32,879,169) using Area of Responsibility 280.

In addition to this state funding, districts with at least 69 current English learners may access federal Title III grants, which in 2021-22 provided an additional \$137.29 per student for supplemental current English learner services<sup>20</sup>. Additional information on the grant amounts is available on the [ODE website under Title III Allocations](#).

<sup>19</sup> For a more detailed description of the accounting system categories, see [Oregon's Program Budgeting and Accounting Manual](#).

<sup>20</sup> Districts with fewer than 69 students can join other districts in a consortium to access these grants.

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## English Learners in Oregon

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## February 2024

[illegible]

Dallas School District Enrollment Report  
February 2024

School	Capacity	Grade 6	Grade 7	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12	Post High	Odysseyware	Last Month	Feb 22/23	Feb 21/22	Feb 20/21	Feb 19/20
LaCreole	[728]	186	180	211							569	585	588	639	709
DHS	[1020]	205	210	226					10		871	842	879	887	867
MCAP	[108]		6	23							68	71	68	59	72
PADTC		2	5	6							18	20	17	14	16
DVA											2561	2600	2651	2643	2890
<b>Grand Total</b>											2580				
Including LVCS/DCS											3047				

LVCS CHARTER	Current	Last Year	Dallas Community School									
In District	130	123	KG	1st	2nd	3rd	4th	5th	6th	7th		
Out of Dist	94	108	18	15	22	27	22	23	32	24		
Total	224	231				8th	9th	10th	11th			
High school extended	228		Total	243		24	16	11	9			
In 2006 Morrison was a charter school with 80 students.												
Elementary reconfiguration effective 09/10 school year.												
Last Year Extended Campus 2015-16												



# **LUCKIAMUTE VALLEY CHARTER SCHOOLS**

2023-24

February

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## **STUDENT TOTALS**

	Current #'s	Last Year
In District	130	123
Out of District	94	108
TOTAL STUDENT #'s	224	231

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## **BREAKDOWN BY GRADE LEVELS**

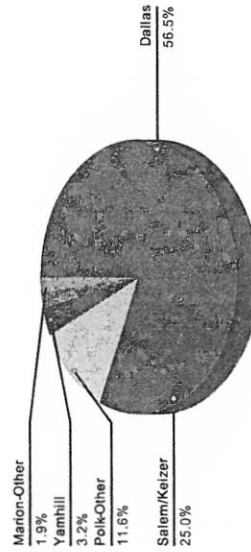
	Current #'s	Last yr.
Kindergarten	23	24
1st Grade	23	23
2nd Grade	22	25
3rd Grade	23	25
4th Grade	25	25
5th Grade-Leah	15	23
5th Grade-Bibbs	21	21
6th Grade	24	26
7th Grade	25	23
8th Grade	23	16

**NUMBERS CURRENT AS OF 01/29/2024**

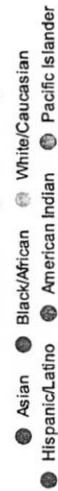
# Dallas Community School Enrollment 2023-24

	Jun 2023	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
K	14	20	19	19	19	18	0	0	0	0	0
1	28	20	19	19	19	16	0	0	0	0	0
2	32	25	23	23	23	22	0	0	0	0	0
3	29	31	29	28	27	27	0	0	0	0	0
4	30	25	24	24	23	22	0	0	0	0	0
5	34	25	23	24	24	24	0	0	0	0	0
6	31	33	31	31	31	32	0	0	0	0	0
7	26	28	27	29	28	24	0	0	0	0	0
8	20	22	21	22	22	23	0	0	0	0	0
<b>K-8 Total:</b>	<b>244</b>	<b>229</b>	<b>216</b>	<b>219</b>	<b>216</b>	<b>208</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
9	13	18	17	17	16	16	0	0	0	0	0
10	13	13	13	12	12	11	0	0	0	0	0
11	0	11	11	11	10	10	0	0	0	0	0
<b>DCHS Total:</b>	<b>26</b>	<b>42</b>	<b>41</b>	<b>40</b>	<b>38</b>	<b>37</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Grand Total:</b>	<b>270</b>	<b>271</b>	<b>257</b>	<b>259</b>	<b>254</b>	<b>245</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

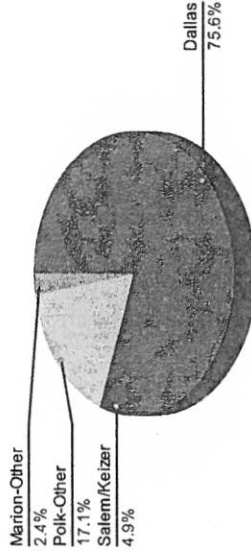
K-8 Enrollment by City/County



K-8 Enrollment by Ethnicity



High School Enrollment by City/County



High School Enrollment by Ethnicity



## BOARD REPORT SUMMARY

[illegible]

EXPENDITURES BY OBJECT												
100	Salaries	14,925.92	42,305.56	145,925.29	200,915.87	137,123.42	126,409.82	127,552.72				795,158.60
200	Benefits	19,036.25	19,521.64	76,624.73	104,939.97	69,930.72	65,852.75	91,529.60				437,435.66
300	Services	10,658.02	15,841.73	8,372.79	19,875.65	41,201.97	18,624.02	21,314.52				135,888.70
400	Supplies	1,849.89	8,172.87	11,231.30	13,687.08	12,937.89	10,491.09	19,601.83				77,971.95
500	Equipment/improvements	2,540.00	3,986.99	24,543.75	8,903.54	2,963.00	8,654.84	29,214.97				80,807.09
600	Dues & Fees	28,557.09	2,334.06	76.84	393.07	523.67	250.00	4,080.88				36,215.61
<b>TOTAL EXPENDITURES</b>		67,557.17	92,162.85	266,774.70	348,715.18	164,680.67	230,282.52	293,294.52	-	-	-	1,563,477.61

EXPENDITURES BY FUNCTION												
1000	Instruction	9,946.31	24,333.16	177,986.15	224,920.86	176,633.53	147,481.09	176,218.86				937,519.96
2000	Support	57,620.86	66,779.89	58,799.68	105,682.56	73,541.28	61,611.90	67,481.03				491,517.20
3000	Food Services		1,049.80	7,045.12	18,111.76	14,505.86	12,534.69	20,379.66				73,626.89
4000	Construction			23,934.75			8,654.84	29,214.97				60,813.56
TOTAL EXPENDITURES		67,567.17	92,162.85	266,774.70	348,715.18	264,680.67	230,282.52	293,294.52	-	-	-	1,563,477.61

FUND BALANCE

695,532.96

695,532.96

695,532.96

695,532.96

695,532.96

695,532.96

26,873.13

02,443.29

,949.00

04.78 7

5.40 795

811  
-17

679,€

NCE

FUND BA

## Luckiamute Valley Charter Schools

## Profit &amp; Loss

January 2024

02/05/24  
Accrual Basis

	Jan 24
Ordinary Income/Expense	
Income	
R1200 · District Pass-Thru	39,469.80
R1510 · Earnings on Investments	1.44
R1600 · Food Service Sales	1,015.00
R3101 · State School Funds	214,445.22
R3102 · OR Free Expanded Eligible Break	933.05
R3120 · Reduced Breakfast/Lunch	56.80
R3299 · Other Restricted State Gr	2,061.80
R4500 · Restricted Rev. from Fed	3,971.24
Total Income	261,954.35
Gross Profit	261,954.35
Expense	
1000 · 1000-INSTRUCTION	
1100 · Regular Programs	
1111 · Elementary Grades K-5	
111-111 · Licensed Salaries	39,443.75
111-112 · Classified Salaries	12,303.96
111-121 · Substitute Salaries	3,062.20
111-131 · Extra Duty Salaries	708.33
111-211 · PERS-Employer	12,187.69
111-212 · PERS-EPPT	2,855.58
111-220 · Social Security	1,963.98
111-231 · Worker's Comp	26.61
111-240 · Health Insurance	21,373.00
111-241 · OR-PFL	209.65
111-355 · Printing	280.09
111-399 · Purchased Services	175.00
111-410 · Supplies	272.72
111-480 · Computer Hardware	564.29
Total 1111 · Elementary Grades K-5	95,426.85
1121 · Middle Programs 6-8	
121-111 · Licensed Salaries	24,151.41
121-211 · PERS-Employer	6,603.18
121-212 · PERS-EPPT	1,548.08
121-220 · Social Security	1,954.75
121-231 · Workers Comp	13.74
121-240 · Health Insurance	4,047.42
121-241 · OR-PFL	101.00
121-355 · Printing	137.77
121-410 · Consumables	817.21
121-460 · Non-consumable	24.79
Total 1121 · Middle Programs 6-8	39,399.35
Total 1100 · Regular Programs	134,826.20

## Luckiamute Valley Charter Schools

## Profit &amp; Loss

January 2024

02/05/24  
Accrual Basis

	Jan 24
1250 · Special Programs	
125-111 · Certified Salaries	4,844.58
125-112 · Classified Salaries	9,991.37
125-121 · Substitute Salaries	212.75
125-211 · PERS Employer	3,904.36
125-212 · PERS-EPPT	935.92
125-220 · Social Security	1,193.30
125-231 · Workers Comp	12.12
125-240 · Health Insurance	10,150.00
125-241 · OR-PFL	66.39
Total 1250 · Special Programs	31,310.79
1270 · Title I	
127-111 · Licensed Salaries	5,058.92
127-211 · PERS	1,563.21
127-212 · PERS-EPPT	336.54
127-220 · Social Security	2,336.66
127-231 · Worker's Comp	14.10
127-240 · Health Insurance	750.00
127-241 · OR-Paid Family Leave	22.44
Total 1270 · Title I	10,081.87
Total 1000 · 1000-INSTRUCTION	176,218.86
2000 · SUPPORT SERVICES	
2100 · Support Services - Students	
2113 · Social Work Services	
211-111 · Licensed Salaries	5,058.92
211-211 · PERS-Employer	1,266.25
211-212 · PERS-EPPT	303.54
211-220 · Social Security	387.00
211-231 · Workers Comp	1.94
211-240 · Health Insurance	1,033.49
211-241 · OR-PFL	19.24
Total 2113 · Social Work Services	8,070.38
Total 2100 · Support Services - Students	8,070.38
2200 · Instructional Staff	
220-313 · Support Services	4,175.00
220-410 · Supplies	27.78
Total 2200 · Instructional Staff	4,202.78
2240 · Instructional Staff Development	
224-341 · Travel	56.72
224-410 · Supplies	380.00
Total 2240 · Instructional Staff Development	436.72
2310 · School Board	

## Luckiamute Valley Charter Schools

## Profit &amp; Loss

January 2024

02/05/24  
Accrual Basis

	Jan 24
231-410 · Consumables	645.00
231-640 · Dues and Fees	2,400.00
<b>Total 2310 · School Board</b>	<b>3,045.00</b>
<b>2410 · School Administration</b>	
241-112 · Confidential Salaries	4,086.00
241-113 · Administrator salaries	6,500.00
241-211 · PERS-Employer	3,282.69
241-212 · PERS-EPPT	352.65
241-220 · Social Security	1,035.96
241-231 · Workers Comp	7.22
241-240 · Health Insurance	1,100.00
241-241 · OR-PFL	54.16
241-340 · Travel	517.00
241-351 · Telephone	202.48
241-353 · Postage	198.00
241-470 · Software	250.00
241-640 · Dues and Fees	1,600.09
<b>Total 2410 · School Administration</b>	<b>19,186.25</b>
<b>2500 · Support services-business</b>	
<b>2520 · Fiscal services</b>	
252-114 · Managerial Classified	4,993.67
252-211 · PERS - Company	1,387.58
252-212 · PERS EPPT	332.62
252-220 · Social Securitiy	424.09
252-231 · Workers Comp	2.82
252-240 · Health-Employer	550.00
252-241 · OR-PFL	22.17
252-380 · Payroll and Accounting Services	400.00
252-381 · Audit Services	3,750.00
252-410 · Supplies	62.19
252-470 · Software	1,324.00
252-640 · Dues and Fees	80.79
<b>Total 2520 · Fiscal services</b>	<b>13,329.93</b>
<b>2540 · Plant services</b>	
254-112 · Classified Salaries	2,414.42
254-211 · PERS-Company	384.52
254-212 · PERS-EPPT	92.18
254-220 · Social Securitiy	184.72
254-231 · Worker's Comp	2.42
254-241 · OR-PFL	9.66
254-322 · Repairs and Maintenance	380.00
254-324 · Rental	637.00
254-325 · Electricity	2,377.06
254-326 · Fuel	123.90
254-328 · Garbage	458.46
254-329 · Other property services	1,649.00
254-410 · Supplies	1,512.77

## Luckiamute Valley Charter Schools

## Profit &amp; Loss

January 2024

02/05/24  
Accrual Basis

	Jan 24
254-460 · Non-consumables	1,800.00
Total 2540 · Plant services	12,026.11
2550 · Transporation	
255-331 · Transportation	5,797.04
Total 2550 · Transporation	5,797.04
Total 2500 · Support services-business	31,153.08
2660 · Technology Services	
266-112 · Classified Salaries	1,000.00
266-211 · PERS Employer	250.30
266-212 · PERS-Pick-Up	60.00
266-220 · Social Security	76.50
266-231 · Workers Comp	0.02
Total 2660 · Technology Services	1,386.82
Total 2000 · SUPPORT SERVICES	67,481.03
3000 · ENTERPRISE & COMMUNITY	
3120 · Food Services	
312-112 · Classified Salary	3,722.44
312-211 · PERS-Employer	915.90
312-212 · PERS-EPPT	219.55
312-220 · Social Security/Medicare	284.77
312-231 · Workers Comp	3.72
312-240 · Health Insurance	3,254.85
312-241 · OR-PFL	57.35
312-410 · Supplies	23.16
312-450 · Food	11,897.92
Total 3120 · Food Services	20,379.66
Total 3000 · ENTERPRISE & COMMUNITY	20,379.66
4000 · FACILITIES ACQUISITION & CONSTR	
4150 · Building Acq, const, impr. Ser	
415-530 · Improvements-Other	29,214.97
Total 4150 · Building Acq, const, impr. Ser	29,214.97
Total 4000 · FACILITIES ACQUISITION & CONS...	29,214.97
6560 · Payroll Expenses	
Total Expense	293,294.52
Net Ordinary Income	-31,340.17
Net Income	-31,340.17



**Dallas Community School**  
Financial Report - Q2, October 2023 to December 2023

Bank Balances as of:	JUL 2023	AUG 2023	SEP 2023	OCT 2023	NOV 2023	DEC 2023
Umpqua Bank Balance	\$1,469,821.20	\$1,453,775.98	\$1,491,449.62	\$1,505,936.52	\$757,930.40	\$747,113.20
Live Oak Bank CD	\$195,122.43	\$195,869.15	\$196,594.51	\$197,346.87	\$198,077.70	\$198,835.73

Revenue/Resources	OCT 2023	NOV 2023	DEC 2023	Actual YTD	Budget YTD	Annual Budget	BVA%
State School Funding	\$201,310.38	\$201,310.38	\$201,310.38	\$1,411,416.65	\$679,200.85	\$2,090,617.50	67.51%
Interest Income	\$752.36	\$730.83	\$758.03	-	-	-	-%
Misc. Income	\$17,405.07	\$2,244.00	\$0.00	-	-	-	-%
<b>Total Revenue</b>	<b>\$219,467.81</b>	<b>\$204,285.21</b>	<b>\$202,068.41</b>				

General Fund - Expenditures by Object Code							
	OCT 2023	NOV 2023	DEC 2023	Actual YTD	Budget YTD	Annual Budget	BVA%
100 Salaries	\$87,856.99	\$86,711.16	\$100,807.16	\$493,826.41	\$533,864.33	\$1,027,690.74	48.05%
200 Associated Payroll	\$42,774.30	\$36,567.60	\$42,006.14	\$244,121.31	\$270,372.16	\$514,493.47	47.45%
300 Services	\$28,818.08	\$20,334.64	\$23,277.18	\$168,786.97	\$216,263.03	\$385,050.00	43.84%
400 Supplies and Materials	\$7,012.37	\$5,898.21	\$11,428.24	\$47,838.39	\$92,861.61	\$140,700.00	34.00%
411 K-8 Allotments	\$23,806.59	\$6,122.51	\$5,262.82	\$47,472.33	\$152,527.67	\$200,000.00	23.74%
500 Equipment/Facility	\$0.00	\$787,443.00	\$438.96	\$800,855.90	-\$736,855.90	\$64,000.00	1251.34%
600 Dues & Fees	\$3,538.49	\$0.00	\$332.49	\$37,171.26	\$9,928.74	\$47,100.00	78.92%
<b>Total Expenditures</b>	<b>\$193,806.82</b>	<b>\$943,077.12</b>	<b>\$183,552.99</b>	<b>\$1,840,072.57</b>	<b>\$538,961.64</b>	<b>\$2,379,034.21</b>	

SIA - Expenditures by Object Code - WORK IN PROGRESS							
	OCT 2023	NOV 2023	DEC 2023	Actual YTD	Budget YTD	Annual Budget	BVA%
100 Salaries	\$0.00	\$0.00	\$0.00	\$0.00	\$23,217.40	\$23,217.40	0.00%
200 Associated Payroll	\$0.00	\$0.00	\$0.00	\$0.00	\$33,568.83	\$33,568.83	0.00%
300 Services	\$0.00	\$0.00	\$0.00	\$0.00	\$7,500.00	\$7,500.00	0.00%
400 Supplies and Materials	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
411 K-8 Allotments	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
500 Equipment/Facility	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
600 Dues & Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
<b>Total Expenditures</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$64,286.23</b>	<b>\$64,286.23</b>	

**Notes from the Business Office**

**Revenue Highlights:**

- Nothing to report.

**Expenditures Highlights:**

- Wells Fargo Building was purchased in November.

**Restricted Grant Highlights:**

- This area is a work in process. Once we finalize our supplemental budget financials will include grant information.

# LUCKIAMUTE VALLEY CHARTER SCHOOLS

## BOARD MINUTES

January 17, 2024

### BRIDGEPORT CAMPUS

**CALL TO ORDER** At 6:38 by Vicki Avery.

**BOARD MEMBERS PRESENT:** (via Zoom) Vicki Avery, Matt Beasley, Kendall Cates, Greg Oldham, Fred Weisensee

**STAFF MEMBERS PRESENT:** (via Zoom) Christy Wilkins, Daniel Shimek, Tammy Price

**BOARD SECRETARY:** (via Zoom) Donna Santa Maria

**1. APPROVAL OF AGENDA-** Greg motioned for approval. Matt seconded. All approved.

## **2. CONSENT AGENDA**

**2.1** – December Board meeting minutes correction. Early Literacy Application was presented and approved and allowed for public comment. Matt made a motion for approval and Fred seconded. All in favor.

## **3. ANNOUNCEMENTS**

**3.1** Next Board Meeting- February 21, 2024. There will be a presentation in the second-grade classroom.

## **4. REPORTS-**

### **4.1 Directors Report-** Christy Wilkins

- School Board Appreciation- a big Thank You to our Board. (due to icy weather, cards and sentiments were not able to be presented).
- ODE approved curriculum for K-5 ELA was reviewed by teachers. Funds for this are already included in this year's budget. Because the Science of Reading Model is being adopted by LVCS, the curriculum material must align with that instruction. Savvas curriculum has been chosen and will pilot in September.
- Technology update- Paul Littrell submitted a proposal for gradual replacement of chromebooks. More discussion and decision-making is needed so Paul will come to a board meeting in the near future.
- Salary and Benefit Increase- all staff to get an increase in wages: hourly 3%, licensed 2%. Increase insurance cap, return bonus, personal leave days.

- **Carnival-** Josh Kibby is heading up the Carnival this year. It has been since 2019 that LVCS has had a carnival. Any equipment that was stored got ruined and we are starting fresh. All the staff are helping, and donations are being accepted for the silent auction.
- The field trip to WOU for the Rainbow Dance is being rescheduled.
- The ice storm made for a lot of work at both campuses- Josh and Daniel really put in a lot of hours to make it clear and safe.
- Tammy Pryce's position of Business Manager has been posted and will remain open until February 14.

#### **4.2 Facility Reports-** Tammy Pryce and Daniel Shimek

- **Bridgeport-** Lights in the parking lot and security cameras are in the process of completion. Pest control is needed in a few modules. The intercom system will need to be replaced or improved.
- **Pedee-** Two-way intercom system needs to be installed along with security cameras and a bell system. There is water in the basement from rain and hopefully by fixing the slope and gravel in the front and side of the building that will take care of it. The replacement of plumbing that is required because of new regulations is coming together and awaiting pricing. Hopefully a priority list with finished pricing will be available by the next board meeting.

#### **4.3 Financial Reports-** Tammy Pryce

- Audit went well- no bad findings.
- In review, Vicki noted a sweep on the account. In short, the account was not automatically closed because the bank needed a letter so they could transfer the monies to a money market. CD will have a 3% rate.

#### **4.4 Student Enrollment-** Student enrollment remains full at both campuses.

Third grade had two openings but are being filled.

### **5. BOARD ACTION ITEMS**

**5.1 Early Literacy Application-** correction to the board minutes as stated in 2.1.

**5.2 Audit Plan of Action for Secretary of State-** the letter will be signed and sent off. Greg motioned to approve, and Kendall seconded. All in favor.

### **6. ADJOURN:**

**6.1** Meeting was adjourned at 7:25 by Vicki Avery.



**Community Innovation Partners**  
**Dallas Community School Agenda [APPROVED]**  
**Friday, February 2, 2024 5:30 P.M.**

**Mission Statement:**

Dallas Community School is an inclusive public charter school supporting collaborative, standards-based education in a flexible, non-traditional environment.

**Vision:**

Dallas Community School will empower non-traditional learners with the knowledge, skills, and abilities to succeed in and contribute value to their community.

**In Person**

689 Main St.  
 Dallas, OR 97338

**Join Zoom Meeting**

<https://us02web.zoom.us/j/84818626667?pwd=OXVMc3BCa2hVQU1BbWZMS21wbUFzdz09>

1. 5:30 PM: Board Meeting Call to Order
2. Executive Session:  
 The board will meet in executive session under the following Oregon Revised Statute (ORS): ORS 192.660(2)(a) to consider the employment of a public officer, employee, staff member or individual agent.  
*Representatives of the news media are allowed to attend executive sessions, except for those sessions held in regard to expulsions. All other audience members are excluded from executive sessions and are asked to exit the meeting area. Representatives of the news media are specifically directed not to report on any of the deliberations during executive sessions, except to state the general subject of the session as listed on the agenda. No recording of executive sessions is allowed without express permission from the board.*
3. Return to open session
4. Review Agreements:
  - a. DCS Board Member Code of Conduct
5. Public Comment:
6. Treasurer's Report - Brian McCoy/Erin Miller
  - a. November/December Financials
  - b. Oregon State Credit Union
7. Consent Agenda:
  - a. February 2, 2024 Agenda
  - b. January 18, 2024 Minutes
  - c. January 27, 2024 Minutes
  - d. November/December 2023 Financials
8. Interim Director Report - Andy Johnson
  - a. Enrollment Report
  - b. Accreditation Update
  - c. Upcoming Events - Master Calendar

d. Dallas Community School Roles and Responsibilities

9. Board Discussion and Action

- a. Juli Ann Lindemann's Resignation
- b. Transition Plan (Wendy)
- c. Supplemental Budget: Heather/Christy
- d. HMK Facilities Project Estimates

10. Adjourn

11. Next Meeting: March 7, 2024 @ 5:30 P.M.



## Board Member Code of Conduct

### A Dallas Community School board member:

- Understands that the board sets the standards for the charter school through board policy.
- Understands that board members do not manage the day-to-day operations of the school. This includes but is not limited to managing the budget, evaluating staff, facilitating student discipline, handling parent concerns and implementing the vision, curriculum, and school philosophy set by the board. In addition, the executive director will liaison with the Dallas School District.
- Understands that the board makes decisions as a team.
- Individual board members may not commit the board to any action.
- Respects the right of other board members to have opinions and ideas that differ.
- Recognizes that decisions are made by a majority vote and should be supported by all board members.
- Makes decisions only after the facts are presented and discussed.
- Understands the chain of command and refers problems or complaints to the executive director.
- Recognizes that the board must comply with the Public Meetings Law and has authority to make decisions only at official board meetings.
- Insists that all board and district business is ethical and honest. Is open, fair and honest — has no hidden agenda.
- Understands that the board member will receive confidential information that cannot be shared.
- Recognizes that the executive director is the board's adviser and should be present at all meetings, except when the board is considering the superintendent's evaluation, contract or salary.
- Takes action only after hearing the executive director's recommendations.
- Refuses to use board membership for personal or family gain or prestige. Announces conflicts of interest before board action is taken.
- Understands their role as a board member and as a parent and ensures these do not conflict in interactions with school staff.
- Refuses to bring personal or family problems into board considerations.
- Gives the staff the respect and consideration due skilled professional employees.
- Presents personal criticism of school system operations to the executive director, not to staff or at a board meeting.
- Respects the right of the public to attend and observe board meetings.
- Respects the right of the public to be informed about board decisions and school operations as allowed by law.



**DALLAS COMMUNITY  
SCHOOL**

- Stay abreast of education policy and statewide issues in education in general and for Charter Schools

Adopted October 2023



## Board Meeting Minutes for Thursday, January 18, 2024 @ 5:30 p.m. [APPROVED]

**PLEASE NOTE: MEETING TOOK PLACE VIDEOCONFERENCE ONLY**  
 School was closed because of the ice storm and facility damage.  
 Board meeting was moved to zoom.

**Date:** January 18, 2024

**Location:** Zoom Only

### In Attendance

**President:** Wendy Sparks

**Vice President:** Erin Miller

**Secretary:** Heather Irwin, Excused for facility work

**Treasurer:** Brian McCoy

**Board Members:** Jessica Mackey

**Staff:** Juli Ann Lindemann, Excused for facility work

**Visitors:** None

### Mission Statement:

Dallas Community School is an inclusive public charter school supporting collaborative, standards-based education in a flexible, non-traditional environment.

### Vision:

Dallas Community School will empower non-traditional learners with the knowledge, skills, and abilities to succeed in and contribute value to their community.

#### 1. Call to order: 5:46 PM

#### 2. Consent Agenda:

- a. January 18, 2024 Agenda
- b. November 16, 2023 Minutes
- c. December 7, 2023 Minutes
- d. November/December 2023 Financials

Motion was made by Erin and seconded by Wendy to approve the agenda with modification and the consent agenda. Motion passed unanimously.

#### 3. Board Discussion Action:

- a. Future of CD Account:
  - i. Erin and Brian reported that the CD at Live Oak Bank matured in early February. Erin and Brian are waiting for information from Juli Ann on how much the board does need to have in liquid assets before they can

recommend putting additional dollars in a CD. Their recommendation is to renew the existing CD + interest earned into a new CD for one year.

Brian made a motion to renew the existing CD + interest in to a new CD with Live Oak Bank. The new CD will be for one year to allow for the highest interest rate (5.4%). The motion was seconded by Jessica. Motion passed unanimously.

**b. Executive Director Evaluation:**

- i. Wendy described the process for executive director evaluation as follows:  
January: Board will fill out their rubric with notes on score.  
February: Board develops and implements a survey of staff and parents; Juli Ann completes self evaluation and provides artifacts.  
March: Board meets in executive or open session with Juli Ann to share feedback and performance evaluation.  
April: Board votes on performance evaluation in open session. This is in the form of a written letter.

**c. Signatory Resolution for Juli Ann Lindemann and Brian McCoy**

- i. A motion was made by Wendy and seconded by Erin to add Jul Ann Lindemann and Brian McCoy as signers on the bank accounts at Umpqua Bank and Live Oak Bank

**d. Mission and Vision:**

- i. Wendy shared the current DCS mission and vision and asked the board to provide feedback by answering this question: Does this mission and vision that we adopted 10 years ago meet the current and future mission of Dallas Community School.
- ii. Wendy shared a new DRAFT mission and vision statement and asked the board to provide feedback to Juli Ann.
- iii. Slides were shared with board members so they could provide feedback on the jamboard.

**4. Adjourn: 6:14 PM**

Next meeting, February 2, 2024 @ 5:30 PM - MakerSpace, 689 Main St., Dallas, OR 97338

**Board Meeting, Special Session**  
**Minutes for Saturday, January 27, 2024 @ 6:00 p.m. [APPROVED]**

**PLEASE NOTE: MEETING TOOK PLACE VIDEOCONFERENCE AND IN PERSON**

**Date:** January 27, 2024

**Location:** Zoom

**In Attendance**

**President:** Wendy Sparks

**Vice President:** Erin Miller

**Secretary:** Wendy Sparks (Acting)

**Treasurer:** Brian McCoy

**Board Members:** Jessica Mackey

**Staff:**

**Visitors:**

1. Call to order: 6:05 PM
2. Agenda Review:
  - a. Motion to adopt 1/27/2024 agenda- Wendy
  - b. Second- Erin
  - c. Motion carries unanimously
3. *Pursuant to ORS 192.660(2)(b)* board moved into executive session at 6:15 PM Board Discussion, Executive Session:
4. Board moved into general session at 8:00 PM
5. Board Action:
  1. Authorization to waive clause 4 (60 days notice requirement) in employment agreement for Juli Ann Lindemann
    - a. Jessica Mackey motions
    - b. Brian McCoy seconds.
    - c. Motion carries, unanimous.
  2. Amend Christy Perry's contract and appoint her as acting administrator from 1/27/2024 through April 30 with the option to renew.
    - a. Jessica Mackey motions
    - b. Brian McCoy seconds.
    - c. Motion carries, unanimous.
  3. Appoint Andy Johnson interim executive director, effective 1/27/2024 through February 2 with option to extend.
    - a. Jessica Mackey motions
    - b. Brian McCoy seconds.
    - c. Motion carries, unanimous.
  4. Move February Board meeting to Friday, 2/2 at 5:30 PM.
    - a. Motion: Brian
    - b. Second: Wendy

- c. Motion carries (Unanimous)
- 5. Authorize Charter School Registered Teacher with expedited service for Nicholas Nelson
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 6. Authorize Charter School Registered Administrator with expedited service for Andrew Johnson
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 7. Authorize Charter School Registered Administrator for Dawn Adams
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 8. Authorize Charter School Registered Administrator for Toni Hannan
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 9. Authorize Charter School Registered Administrator for Heather Irwin
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 10. Authorize Erin Miller, Brian McCoy, Andy Johnson as signers on the Umpqua Bank account.
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 11. Authorize removal of Juli Ann Lindemann from Umpqua Bank account.
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 12. Authorize adding Andrew Johnson to Live Oak Bank account
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 13. Authorize removal of Juli Ann Lindemann from Live Oak bank account.
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 14. Motion to place Juli Ann Lindemann on paid leave from 1/27 through 2/2/2024.
  - a. Jessica Mackey motions
  - b. Brian McCoy seconds.
  - c. Motion carries, unanimous.
- 15. Approve the 1/27/2024 minutes

- a. Wendy Sparks motions
- b. Brian McCoy seconds
- c. Motion carries, unanimous

6. Adjourn: 8:20 PM

February 2024						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Key				1	2	
K-8 Program				DCHS: Early Release Day 2pm	K-8: In-Service Planning	Misc. Event: Neon Kids
DCHS Program				Board Appreciation Day	K-8: Activity Day at WOU 2-4	
Community					Board Meeting 5:30pm	
Executive Director						
Board of Directors						
State Testing						
4	5	6	7	8	9	10
Misc. Events: 6th Grade Outdoor School Parent Information Night 6-7pm	K-8: Staff Mtg. 2-4pm State Test Training	K-8: FINAL Term 3 (Spring) Course Catalog to Staff IA Check In Mtg. 1:45pm	K-8: FINAL Term 3 (Spring) Course Catalog to families (goes public)	DCHS: Early Release Day 2pm K-2 Hearing Screening, 9:30-10:00am	Workshops: K-2 Fine Motor Skills - Valentine Themed 3-8 Chocolate Making 5-8 SMART Goal and Vision Board Workshop	
11	12	13	14	15	16	17
K-8: SPIRIT WEEK Storybook Character Day	K-8: SPIRIT WEEK Tie Dye v. Camo	K-8: SPIRIT WEEK (Valentine's Day) Wear RED and crazy hair	K-8: SPIRIT WEEK Pajama Day	DCHS: Early Release Day 2pm K-8 Spirit Week	Workshops: K-5: 100th of school	
Onsite Course Selections 1st Rnd., Term 3 (Spring) OPENS @ 8am K-8 Spirit Week	Staff Mtg. 2-4pm K-8 Spirit Week	IA Check In Mtg. 1:45pm Onsite Course Selections 1st Rnd., Term 3 (Spring) CLOSES @ 12pm	IA Check In Mtg. 1:45pm Onsite Course Selections 1st Rnd., Term 3 (Spring) CLOSES @ 12pm			
K-11: 11:15 Fire Drill		K-8 Spirit Week	K-8 Spirit Week			
		DCHS Junior Class Fundraiser Parent's Night Out 5:30-8pm				
18	19	20	21	22	23	24
President's Day - 19	K-8: Staff Mtg. 2-4pm 1st Rnd., Term 3 (Spring) Rubric Party	K-8: 1st Rnd., Term 3 (Spring) Email confirmations to families IA Check In Mtg. 1:45pm	DCHS: Early Release Day 2pm	DCHS: Early Release Day 2pm	Workshops: K-3: Owls! Presented by Salem Audubon	
25	26	27	28	29		
K-8: Onsite Course Selections 2nd Rnd., Term 3 (Spring) OPENS @ 8am	K-8: Staff Mtg. 2-4pm	K-8: Onsite Course Selections 2nd Rnd., Term 3 (Spring) CLOSES @ 12pm	K-8: Onsite Course Selections 2nd Rnd., Term 3 (Spring) IA Check In Mtg. 1:45pm Field Trip: 3-8 Oregon Symphony, 2023-2024 Young People's Concert, 10am	DCHS: Early Release Day 2pm		

2/1/2024 12:19:18

March 2024						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>Key</b> K-8 Program DCHS Program Community Executive Director Board of Directors State Testing					1 K-8: In-Service Planning	2
3	4 State Test Notice to families (Grades 3-8) All students entered into spreadsheet "DCS State Assessments - Spring 2024"	5 K-8: Staff Mtg. 2-4pm 2nd Rnd., Term 3 (Spring) Rubric Party	6 K-8: 2nd Rnd., Term 3 (Spring) Email confirmations to families IA Check In Mtg. 1:45pm LC to Guides: Reimb./Orders Deadline until after spring break	7 DCHS: Early Release Day 2pm Board Meeting 5:30pm	8 Guides to Lori: Reimb./Orders Deadline until after Spring Break DCHS: Guardian Check-in Catch Up Day Deadline - ALL Reimb./Orders until after Spring Break	9
10	11 K-8: Onsite Course Selections 3rd Rnd., Term 3 (Spring) OPENS @ 8am	12 K-8: Staff Mtg. 2-4pm	13 K-8: Onsite Course Selections 3rd Rnd., Term 3 (Spring) CLOSES @ 12pm IA Check In Mtg. 1:45pm	14 K-8: EXHIBITION NIGHT DCHS: Early Release Day 2pm City of Dallas Leadership - DCS building tour (Andy & Audrey) 1-2pm K-11: Fire Drill 2:00pm	15 6-8 Book Club Class: Movie - The Invention of Hugo Cabret 12:30-3:30pm	16
17	18	19 K-8: Staff Mtg. 2-4pm 3rd Rnd., Term 3 (Spring) Waitlist Party	20 K-8: 3rd Rnd., Term 3 (Spring) Email Confirmations to families IA Check In Mtg. 1:45pm	21 DCHS: Early Release Day 2pm Rhonda Uploads K-8 Spring Term Std't Schedules	22 DCHS: No School - Assmt. Day	23
24	25	26	27	2	29	30
Easter-31	Spring Break School Closed	Spring Break School Closed	Spring Break School Closed	Spring Break School Closed	Spring Break School Closed	

2/1/2024 12:19:18



April 2024						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
<b>Key</b>	K-8: Term 3 (Spring) In-Home NO Students Onsite	K-8: Staff Mtg. 2-4pm	K-8: IA Check In Mtg. 1:45pm IA's Appreciation Day	DCHS: Early Release Day 2pm Board Meeting 5:30pm Ready for Kinder TBA	K-8: In-Service Planning TBD ~Scholastic Book Fair	Ready for Kinder TBA
K-8 Program	No students onsite; Onsite classes begin 4/8/24					
DCHS Program						
Community						
Executive Director						
Board of Directors						
State Testing						
	7	8	9	10	11	12
	K-8: Term 3 (Spring) Onsite Classes Start	K-8: Staff Mtg. 2-4pm	K-8: IA Check In Mtg. 1:45pm	DCHS: Early Release Day 2pm	6-8: Course Sect. #2233 Students watching movie in LR Counselor Appreciation Day K-8 Field Trip 10am-12pm Oregon Trail Themed Historical Museum	
14	15	16	17	18	19	20
	K-8: State Testing Prep Create Std. Testing & Staff Coverage Forms (Lori)	K-8: Staff Mtg. 2-4pm	K-8: IA Check In Mtg. 1:45pm	DCHS: Early Release Day 2pm K-11: 9:55 Fire Drill		
	State Test Prep Starts (Gr. 3-8)			State Test (Grades 3-8) Communication to families		
21	22	23	24	25	26	27
	K-8: State Test Registration Opens	K-8: Staff Mtg. 2-4pm	K-8: IA Check In Mtg. 1:45pm DCHS: Student Lead Conf.	K-8: State Test Registration Closes	K-8: State Test Confirmation Emails DCHS: In-Service Day No Students Onsite Admin. Asst. Appreciation Day	
	State Test Registration (Grades 3-8) OPENS @ 8am			DCHS: Early Release Day Student Lead Conf.	K-8: State Test Confirmation Emails (Grades 3-8)	
				State Test Registration (Grades 3-8) CLOSES @ 12pm		
28	29	30				
	Field Trip: 6th Grade Outdoor School	K-8: Staff Mtg. 2-4pm Destiny Reports distrib. to guides @ mtg. (Kaitlyn)				

2/1/2024 12:19:18

## **Roles and Responsibilities**

### **Andy Johnson - Director**

- Oversees all operations
- Runs Karaoke
- Creation/Implementation/Evaluation of Operational Systems
- Grant Acquisition and Community Relationships
- Marketing
- Accreditation,
- Mentoring Teachers and Staff
- Teacher Evaluations
- Tier 2 Tier 3 behavior management systems
- SPED
- Facilities

### **Heather Irwin - Office Manager**

- Oversees all office operations,
- HR,
- Budget,
- Systems
- Assistance with Facilities
- Audit
- Board Secretary

### **Lori Jones - Administrative Assistant**

- Assistance with Facilities
- Support office operations
- Support with K-8 Schedules
- Support with K-8 operations
- Administrative Assistant
- Supports Community Coordinator

### **Rhonda Hayes - Registrar**

- PowerSchool
- Pulling necessary reports
- All School Communication
- Reception
- School registrar
- SPED scheduling
- SIT notes / 504 notes

**Dawn Adams - Assistant Director (K-8)**

- K-8 operations,
- K-8 Recruitment,
- K-8 Social Media,
- Manage all school IA schedules,
- Early Literacy Work,
- Accreditation Assistance,
- Assist in overseeing K-8 curriculum
- Teacher evaluation
- K-8 Behavior management

**Cami Mather / Ian McMorro - HS co-lead teaching**

- HS operations,
- HS Recruitment,
- HS Social Media (Julia N.)
- HS Facilities assistance and input
- Assist in overseeing curriculum
- Behavior management (Tier 1/ Tier 2)
- Data Collection for Accreditation

**Toni Hannan - HS Counselor**

- HS Counselor,
- OES standards
- SEL Work,
- Graduation,
- Post-Secondary
- Family Support/County Connections

**Audrey McMorro - Community Outreach Coordinator**

- Community Outreach,
- Marketing,
- Recruitment,
- Guest Teachers,
- Building Use,
- Field Trips,
- Student Activities



Dallas Community School  
 689 Main Street  
 Dallas, OR 97338  
 Phone: 503/420-4360  
[www.dallascommunityschool.org](http://www.dallascommunityschool.org)

February 2, 2024

TO: Dallas Community School Board of Directors

FROM: Heather Irwin, Business Manager

SUBJECT: Supplemental Budget

This supplemental budget is presented for your approval at the February 2, 2024 Board Meeting. Since the budget was adopted in June of 2023, Dallas Community School has needed to adapt their budget to meet the evolving needs of the school and to adjust to multiple personnel changes.

The presented budget in the following pages includes the following:

1. New format to show Fund 100, Fund 200 and Fund 401 as separate funds with descriptions.
2. Fund 200 Grants is not presented for 2.1.24. A full overview of our grants will be provided in March and Fund 200 will be presented for your review at that time. No supplemental budget process is needed for Fund 200.
3. CD at Live Oaks Bank is captured as resources (revenue) 5200 is the CD and the interest income is captured in 1510.
4. All salary projections are represented as of any personnel changes on 1.31.24
5. Employee bonuses are included in the salary adjustments.
6. Expenses budgeted for consultants during this interim time.
7. New Fund 401 - This fund will capture the revenue and capital expenditures for the new building. To date there has been an interfund transfer out of the general fund (fund 100), to Fund 401. The costs associated with the property purchase and project management are coded as expenses in Fund 401. If we choose to borrow to complete the renovations, the borrowed revenue will be forecasted in the 2024-25 Budget Document and the expenses for the renovations will be coded here as well.
8. Function 5220 shows the interfund transfer which transfers the dollars from Fund 100 to Fund 401
9. As you review fund 100 notice there is \$926,033.03 in an unappropriated ending fund balance and this is 22.41 % of the total budget. Best practice for the school district's ending fund balance is 5-7%.

## Dallas Community School - Budget 2023-24

## General Fund - 100

The General Fund accounts for all activities related to the general operation of Dallas Community School in providing instruction and support services to students grades K-11. All revenues and expenditures are recorded here except those required to be accounted for in another fund. This report provides detail level summary of all general fund actual and planned financial activity for the 2023-24 school year.

	Adopted Budget Adopted May 2023	Supplemental Budget 2023-24
<b>RESOURCES</b>		
1510 Interest	\$8,400.00	\$8,400.00
3101 State School Fund	\$2,090,617.50	\$2,427,148.37
5000 Other Source-CD	\$194,378.55	\$194,378.55
5400 Beginning Fund Balance	\$1,501,648.00	\$1,501,648.00
<b>RESOURCES TOTAL:</b>	<b>\$3,795,044.05</b>	<b>\$4,131,574.92</b>

	Adopted Budget Adopted May 2023	Supplemental Budget 2023-24
<b>EXPENSES</b>		
<b>1000 INSTRUCTION</b>		
1111 K-8 Program		
1111-111 Certified Salaries	\$363,222.20	\$372,822.20
1111-112 Classified Salaries	\$58,241.64	\$79,434.61
1111-121 Sub. Teacher Salaries	\$10,000.00	\$10,000.00
1111-240 Health/Dental Insurance	\$51,000.00	\$51,660.00
1111-312 Extracurricular Programs	\$12,000.00	\$12,000.00
1111-390 Professional Development	\$3,000.00	\$3,000.00
1111-410 Consumable Supplies	\$5,000.00	\$5,000.00
1111-411 Allotment	\$200,000.00	\$150,000.00
1111-460 Non-Consumables Supplies	\$2,000.00	\$2,000.00
1111-470 Computer Software	\$4,000.00	\$4,000.00
1111-480 Computer Hardware	\$10,000.00	\$10,000.00
<b>Total:</b>	<b>\$718,463.84</b>	<b>\$699,916.81</b>
1131 High School Program		
1131-111 Certified Salaries	\$228,010.01	\$174,624.66
1131-112 Classified Salaries	\$38,838.65	\$28,778.00
1131-121 Sub. Teacher Salaries	\$5,000.00	\$5,000.00
1131-240 Health/Dental Insurance	\$51,000.00	\$34,440.00
1131-310 Professional/Tech. Svs.	\$1,000.00	\$1,000.00
1131-311 Instruction Services	\$7,500.00	\$7,500.00
1131-312 Extracurricular Programs	\$5,000.00	\$5,000.00
1131-340 Travel	\$2,500.00	\$2,500.00
1131-390 Professional Development	\$7,000.00	\$7,000.00
1131-410 Consumable Supplies	\$15,000.00	\$15,000.00
1131-420 Textbooks	\$5,000.00	\$5,000.00
1131-460 Non-Consumables Supplies	\$20,000.00	\$20,000.00
1131-470 Computer Software	\$3,000.00	\$3,000.00
1131-480 Computer Hardware	\$20,000.00	\$20,000.00
1131-550 Technology Equipment	\$10,000.00	\$10,000.00
<b>Total:</b>	<b>\$418,848.66</b>	<b>\$338,842.66</b>
1283 Expanded Options		
1283-371 Tuition	\$20,000.00	\$20,000.00
1283-420 Textbooks	\$5,000.00	\$5,000.00
<b>Total:</b>	<b>\$25,000.00</b>	<b>\$25,000.00</b>
1289 STEAM Machine		

1289-410	Consumable Supplies	\$5,000.00	\$5,000.00
1289-460	Non-Consumable Supplies	\$5,000.00	\$5,000.00
Total:		\$10,000.00	\$10,000.00
INSTRUCTION TOTAL:		\$1,172,312.50	\$1,073,759.47

## 2000

## SUPPORT

## 2120 Guidance Services

2120-111	Certified Salaries	\$57,880.76	\$63,630.76
2120-318	Professional Development	\$2,000.00	\$2,000.00
2120-410	Consumable Supplies	\$500.00	\$500.00
2120-480	Computer Hardware	\$2,500.00	\$2,500.00
Total:		\$62,880.76	\$68,630.76

## 2220 Library Media Center

2220-430	Library Books	\$3,000.00	\$3,000.00
2220-640	Dues and Subscriptions	\$1,500.00	\$1,500.00
Total:		\$4,500.00	\$4,500.00

## 2230 Assessment and Testing

2230-312	Testing Services	\$6,000.00	\$6,000.00
Total:		\$6,000.00	\$6,000.00

## 2231 DCS Board of Directors

2231-355	Printing	\$200.00	\$200.00
2231-640	Dues/Fees	\$800.00	\$800.00
Total:		\$1,000.00	\$1,000.00

## 2400 School Administration

2400-113	Administrative Salaries	\$163,600.00	\$158,500.00
2400-112	Classified Salaries	\$29,297.66	\$30,047.66
2400-240	Health/Dental Insurance	\$8,500.00	\$25,830.00
2400-310	Professional/Tech. Svs.	\$0.00	\$20,000.00
2400-340	Travel	\$500.00	\$500.00
2400-353	Postage	\$600.00	\$600.00
2400-355	Printing	\$12,000.00	\$12,000.00
2400-382	Legal Services	\$2,500.00	\$7,000.00
2400-390	Professional Development	\$1,500.00	\$9,500.00
2400-410	Consumable Supplies	\$1,000.00	\$1,000.00
2400-470	Computer Software	\$10,000.00	\$10,000.00
2400-480	Computer Hardware	\$5,000.00	\$5,000.00
2400-640	Dues/Fees	\$3,000.00	\$3,000.00
2400-651	Liability Insurance	\$16,800.00	\$22,000.00
Total:		\$254,297.66	\$304,977.66

## 2410 Office of the Principal

2410-410	Consumable Supplies	\$3,000.00	\$3,000.00
Total:		\$3,000.00	\$3,000.00

## 2520 Fiscal Services

2520-114	Managerial Salaries	\$73,600.00	\$79,350.00
2520-211	PERS Employer Contribution	\$240,210.29	\$253,251.00
2520-212	PERS EPPT Pick Up	\$60,761.46	\$59,231.00
2520-219	Payroll Taxes	\$81,521.72	\$85,392.00
2520-231	Workman's Comp	\$6,500.00	\$6,500.00
2520-232	Unemployment	\$15,000.00	\$15,000.00
2520-310	Professional/Tech. Svs.	\$30,000.00	\$30,000.00
2520-380	Payroll Service Fees	\$11,250.00	\$11,250.00

2520-381	Audit Services	\$24,000.00	\$24,000.00
2520-390	Professional Development	\$0.00	\$0.00
2520-410	Consumable Supplies	\$1,200.00	\$1,200.00
2520-460	Non-Consumable Supplies	\$1,500.00	\$1,500.00
2520-470	Computer Software	\$5,500.00	\$5,500.00
2520-480	Computer Hardware	\$2,500.00	\$2,500.00
2520-640	Dues/Fees	\$1,000.00	\$1,000.00
Total:		\$554,543.47	\$575,674.00

## 2540 Facility Services

2540-321	Cleaning	\$33,000.00	\$33,000.00
2540-322	Repairs/Maintenance	\$14,000.00	\$14,000.00
2540-324	Rental	\$136,000.00	\$136,000.00
2540-325	Electricity	\$11,000.00	\$13,000.00
2540-326	Fuel-Heating/Cooling	\$4,000.00	\$4,000.00
2540-327	Water	\$2,100.00	\$2,100.00
2540-328	Garbage	\$2,100.00	\$2,100.00
2540-351	Telephone/Fiber	\$16,800.00	\$16,800.00
2540-329	Other Property Services	\$15,000.00	\$15,000.00
2540-390	Professional/Tech. Svs.	\$5,000.00	\$5,000.00
2540-410	Consumables Supplies	\$4,000.00	\$4,000.00
2540-460	Non-Consumables Supplies	\$2,000.00	\$2,000.00
2540-520	Major Building Improvements	\$30,000.00	\$30,000.00
2540-530	Improvement Other Than Building	\$10,000.00	\$10,000.00
2540-541	Equipment	\$10,000.00	\$10,000.00
2540-542	Replacement Equipment	\$4,000.00	\$4,000.00
2540-640	Dues/Fees	\$4,000.00	\$4,000.00
2540-653	Property Insurance Premium	\$20,000.00	\$20,000.00
Total:		\$323,000.00	\$325,000.00
SUPPORT TOTAL:		\$1,209,221.89	\$1,288,782.42

5220  
7000INTERFUND TRANSFER  
UNAPPROPRIATED END BALANCE

401 Facility Expenses	\$0.00	\$800,000.00
	\$1,413,509.66	\$969,033.03
TOTAL EXPENSES:	\$3,795,044.05	\$4,131,574.92



**Dallas Community School - Budget 2023-24**  
**Capitol Projects Fund - 401**

*Fund 401 tracks our 2023-2025 high school expansion project. The Well's Fargo building was purchased in November 2023 and preliminary work for building use permit and design has been completed. The complete budget will be proposed during the 2024-25 budget season.*

	Opted Budget Adopted May 2023	Supplemental Budget 2023-24
<b>RESOURCES</b>		
1990 Miscellaneous	\$0.00	\$0.00
2200 Restricted Revenue	\$0.00	\$0.00
3000 State Revenue	\$0.00	\$0.00
5220 Interfund Transfer	\$0.00	\$800,000.00
5100 Loan Proceeds	\$0.00	\$0.00
<b>RESOURCES TOTAL:</b>	<b>\$0.00</b>	<b>\$800,000.00</b>

	Opted Budget Adopted May 2023	Supplemental Budget 2023-24
<b>EXPENSES</b>		
<b>4000 FACILITIES ACQUISITION AND CONSTRUCTION</b>		
4150 Building Acquisition, Construction, and Improvement Svs.		
4150-329 Other Property Services	\$0.00	\$0.00
4150-382 Legal Services	\$0.00	\$7,000.00
4150-390 Professional/Tech. Svs.	\$0.00	\$18,000.00
4150-410 Consumables Supplies	\$0.00	\$0.00
4150-460 Non-Consumables Supplies	\$0.00	\$0.00
4150-520 Building Acquisition/Major Building Improven	\$0.00	\$775,000.00
4150-530 Improvement Other Than Building	\$0.00	\$0.00
4150-540 Depreciable Equipment	\$0.00	\$0.00
4150-541 New Equipment	\$0.00	\$0.00
4150-542 Replacement Equipment	\$0.00	\$0.00
4150-550 Technology Equipment	\$0.00	\$0.00
4150-640 Dues/Fees	\$0.00	\$0.00
Total:	\$0.00	\$800,000.00
<b>FACILITY TOTAL:</b>	<b>\$0.00</b>	<b>\$800,000.00</b>
<b>TOTAL EXPENSES:</b>	<b>\$0.00</b>	<b>\$800,000.00</b>
<b>ENDING FUND BALANCE:</b>	<b>\$0.00</b>	<b>\$0.00</b>



**DALLAS COMMUNITY SCHOOL  
LOAN RENOVATION PROJECT  
RENOVATION BUDGET  
NOVEMBER 20, 2023**

<b>Project Expense</b>	<b>Original Budget</b>	<b>Paid to Date</b>	<b>Remaining Balance</b>	<b>Revised Budget</b>
<b>Hard Cost</b>				
Maximum Allowable Construction Cost (MACC)	\$ 1,275,000	\$ -	\$ 1,275,000	\$ 1,275,000
	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -
Asbestos Abatement	\$ 30,000	\$ -	\$ 30,000	\$ 30,000
Seismic Retro Upgrade	\$ -	\$ -	\$ -	\$ -
1.5% Green Energy Technology	\$ -	\$ -	\$ -	\$ -
Construction Contingency	\$ 80,100	\$ -	\$ 80,100	\$ 80,100
<b>Construction Sub Total</b>	<b>\$ 1,385,100</b>	<b>\$ -</b>	<b>\$ 1,385,100</b>	<b>\$ 1,385,100</b>
<b>Soft Cost</b>				
<b>Administrative Cost</b>				
Legal Fees	\$ 10,000	\$ -	\$ 10,000	\$ 10,000
Bond Counsel	\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost	\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance	\$ -	\$ -	\$ -	\$ -
Project Management	\$ 98,000	\$ -	\$ 98,000	\$ 98,000
Reimbursable Expenses	\$ 2,500	\$ -	\$ 2,500	\$ 2,500
Other Administrative Charges	\$ -	\$ -	\$ -	\$ -
<b>Site Cost</b>				
Site Survey	\$ -	\$ -	\$ -	\$ -
Geo-Tech Report	\$ -	\$ -	\$ -	\$ -
<b>Planning Cost</b>				
Design Fees	\$ 170,000	\$ -	\$ 170,000	\$ 170,000
A & E Reimbursable Expenses	\$ 5,000	\$ -	\$ 5,000	\$ 5,000
Commissioning	\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant	\$ 8,000	\$ -	\$ 8,000	\$ 8,000
Building Envelope Consultant	\$ -	\$ -	\$ -	\$ -
Constructability Review	\$ -	\$ -	\$ -	\$ -
Special Inspection and Testing	\$ 9,500	\$ -	\$ 9,500	\$ 9,500
Plan Review & Building Permits	\$ 26,000	\$ -	\$ 26,000	\$ 26,000
Printing & Plan Distribution	\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees	\$ -	\$ -	\$ -	\$ -
Ed Specs	\$ -	\$ -	\$ -	\$ -
Kitchen	\$ -	\$ -	\$ -	\$ -
<b>Miscellaneous</b>				
Legal Advertisements	\$ 1,200	\$ -	\$ 1,200	\$ 1,200
Furniture, Fixtures, and Equipment (FF&E)	\$ 275,000	\$ -	\$ 275,000	\$ 275,000
Technology	\$ 26,000	\$ -	\$ 26,000	\$ 26,000
Technology (Design)	\$ -	\$ -	\$ -	\$ -
Acoustics	\$ -	\$ -	\$ -	\$ -
Criminal Background Checks	\$ 290	\$ -	\$ 290	\$ 290
System Development Charges	\$ 26,000	\$ -	\$ 26,000	\$ 26,000
Value Engineering	\$ -	\$ -	\$ -	\$ -
Utility Connection Fee	\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	\$ 200,000	\$ -	\$ 200,000	\$ 200,000
Inflation	\$ -	\$ -	\$ -	\$ -
<b>Sub Total Soft Cost</b>	<b>\$ 857,490</b>	<b>\$ -</b>	<b>\$ 857,490</b>	<b>\$ 857,490</b>
<b>Total Project Cost</b>	<b>\$ 2,242,590</b>	<b>\$ -</b>	<b>\$ 2,242,590</b>	<b>\$ 2,242,590</b>



January 17, 2024

Juli Ann Linderman, Executive Director  
 Dallas Community School  
 689 Main Street  
 Dallas, Oregon 97338

Re: Dallas Community School – High School Remodel Project Management Fee Proposal

Dear Juli Ann,

HMK Company is pleased to present a fee to provide Program | Project Management services for the Dallas Community Schools for the remodel to the new High School. We understand that the project assigned to the Program | Project Manager is funded by traditional loan financing with a project budget of \$2,242,590. The basis for this fee is recognizing the project having a 18 month duration.

Project scope summary to include, but not be limited to, the following:

**High School Remodel:** remodeling to building recently purchased formerly Wells Fargo Bank. Project purposes to modernize the existing building to accommodate spaces for the Dallas Community High School.

The scope of services listed below are the responsibilities and duties of the Program | Project Management group and compliment the services listed in the RFP:

1. Services Required
  - a. Act as District's representative during all designated phases of the capital program.
  - b. Provide and distribute, throughout all phases, management reports detailing program progress, schedule and financial status.
  - c. Assist the District in creation and implementation of format(s) to disseminate this information to the public at large.
  - d. Attend public meetings as a representative of the District.
  - e. Provide management to ensure compliance with all public entity rules and regulations.
  - f. Provide periodic presentations/tours as directed by the District.
2. Contract Administrative Tasks
  - a. Responsible for the procurement of various professional services via appropriate public procurement.
  - b. Responsible for all administrative tasks related to the solicitations including placing advertisements, issuance of all notices, review of proposals with the District, recommendations to award contracts, and issuance of contracts. Collection of all required contract documentation including insurance certificates, W9, and other required paperwork.
  - c. Administrate criminal background and SB 155 check process providing District and contractors a weekly matrix of all employees screened through the background check process as required by law.
  - d. Keep repository of all solicitation, award, and contract documentation for auditors.

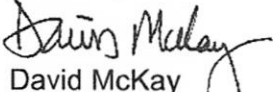
- e. Provide District with contracts that can be the basis for Districts legal review.
- 3. Program Planning Phase
  - a. Develop an overall Program Implementation Plan for the project to include a preliminary master schedule, critical dates, preliminary contracting strategy for all projects, and other pertinent issues.
  - b. Review projects and develop a master program budget.
  - c. Develop a project reporting, communications, and documentation system to include progress, schedule, financial, and other information to be distributed to appropriate parties throughout all phases of the work.
  - d. Develop procedures for administration of the projects.
  - e. Develop and negotiate consultant contracts in conjunction with District's staff when requested.
- 4. Consultant Solicitation Process
  - a. Generate, issue and facilitate the RFP process and selection for Design Consultants including Architects, Hazardous Material Consultant, Geo-Technical Investigation, Topographical Site Survey, Envelope Consultant, Commissioning Agent, Construction special inspection, and other owner solicited consultants.
  - b. Generate, issue and facilitate the RFP process and selection of Construction Manager | General Contractor (CM|GC) if the CM|GC is the desired project delivery method.
- 5. Schematic Design Phase
  - a. Provide general direction to the project consultants and architects. Monitor their activities, and review consultant products. Review and recommend the payment of consultant billings.
  - b. Monitor design schedule. Monitor the design process by reviewing design documents for thoroughness and code compliance. Review cost estimates in conjunction with the design teams for each project in each phase of the design process.
  - c. Assist with value engineering and energy efficiency design protocols. Assist with constructability analysis.
  - d. Coordinate the design process with the master schedule.
  - e. Facilitate and assist Design team with cost estimate review and reconciliation process.
  - f. Work with the District and other consultants on the development of the Division 0 and 1 (Front End) Specifications for the administration of work during the construction process.
  - g. Assist with bid package format (designation of additive and deductive alternates, etc.).
  - h. Identify long lead items and collaborate on processes to insure timely delivery in alignment with the master project schedules.
  - i. Assist Architect firm in permitting projects.
- 6. Design Development Phase
  - a. Review and evaluate final selection of components and systems.
  - b. Assist with establishment of bidding schedule.
  - c. Establish general conditions planning.
  - d. Facilitate and assist Design team with cost estimate review and reconciliation process.
  - e. Refine project budgets.
  - f. Evaluate and identify prospective responsible local contractors available to bid on projects.
- 7. Construction Document Phase
  - a. Review and evaluate final selection of components and systems.

- b. Assist with establishment of bidding schedule.
  - c. Establish general conditions planning.
  - d. Facilitate and assist Design team with cost estimate review and reconciliation process.
  - e. Refine project budgets.
- 8. Contract Document Review
  - a. Conduct final pre-bid review of project manual(s), plans, and specifications.
  - b. Assist in preparation of instructions to bidders.
- 9. Bidding and Contract Award Phase
  - a. Consult with the District and its consultants regarding bid document preparation, bidding strategies, evaluation of bids, and notification of qualified bidders.
  - b. Take part in pre-bid conferences.
  - c. Assist District in evaluation of bid responses and bid award in alignment with project master budgets
  - d. Set disbursement schedules with contractor(s).
- 10. Construction Phase
  - a. Facilitate periodic Owner, Architect, & Contractor (OAC) construction meetings. Monitor general and subcontractor's work with the Architect to support conformance to codes and project design specifications. HMK will be responsible for producing the meeting minutes.
  - b. Prepare and coordinate preparation of End of Month progress and financial information reports required by the District; periodically brief District staff and the School Board on project status, progress, and financial aspects.
  - c. Review and evaluate work completed and materials received, review and recommend progress payments.
  - d. Review and evaluate with design team change orders. Communicate change orders and construction change directives to the Superintendent for authorization.
  - e. Work with general contractor to support the security and safety of the project site during construction.
  - f. Track and communicate the District occupancy schedule(s).
  - g. Assist with punch list development.
  - h. Review and evaluate substantial completion, temporary occupancy, and final occupancy.
  - i. Ensure training of District staff on building systems and turnover process.
- 11. Post Construction Phase
  - a. Participate in construction contract close-out activities including final payment and release of retainage.
  - b. Assist with documentation of warranty issues for ongoing administration by District staff.
  - c. Provide final project close-out financial information.
  - d. Facilitate 11 month warranty walk with architect and contractor. Monitor contractors completion of items identified during 11 month walk.
- 12. Other Services
  - a. Assist the District in tasks as directed by the Business Manager.
  - b. Assist District in application for possible energy savings, rebates, or funding from State and utility companies' programs.
- 13. Communication Services – Additional Charge
  - a. Deploy one at least one social media post per project each week across three platforms Facebook, Instagram, and LinkedIn. Posts will tag as school district pages as appropriate, with advertisement money placed for specific reach in the local community.
  - b. Develop and maintain bond landing page.

- c. Produce a monthly newsletter for email distribution.
- d. Produce a quarterly newsletter for email distribution.
- e. Still photography and videos will be done at an extra cost.
- f. Assist the District in communicating with its staff and community as specifically directed by the District.

The project management fee proposal is a "not-to-exceed" fixed fee proposal in the amount \$199,656.00 plus reimbursable expenses based upon assigned staff as outlined in the fixed fee matrix included. Compensation will be based on the Hourly Rate Schedule as set forth in the RFP response, subject to annual adjustments. This is a 11 - month duration contract commencing on February 1, 2024 and ending on October 31, 2025.

Kind Regards,

  
David McKay  
CEO | Co-Owner



HMK COMPANY  
DALLAS COMMUNITY SCHOOL  
HIGH SCHOOL BUILDING RENOVATION PROJECT  
FIXED FEE MATRIX

	2024												2024 Rate
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Principal in Charge		4	4	2	2	2	2	2	2	2	2	2	\$ 175
Program Manager		32	32	32	32	32	32	32	32	64	64	64	\$ 150
Project Manager		0	0	0	0	0	0	0	0	0	0	0	\$ 150
Project Administration		32	32	32	16	16	16	16	16	16	16	16	\$ 90
Project Administration		0	2	2	2	2	2	2	2	2	2	2	\$ 90
													\$ -
Hours	0	68	70	68	52	52	52	52	52	84	84	84	
FTE	0.0	0.4	0.4	0.4	0.3	0.3	0.3	0.3	0.3	0.5	0.5	0.5	
Monthly Fee	\$ -	\$ 8,380	\$ 8,560	\$ 8,210	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 6,770	\$ 11,570	\$ 11,570	\$ 11,570	\$ 11,570

	2025												2025 Rate
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Principal in Charge	2	2	2	2	2	2	2	2	2	2	0	0	\$ 180
Program Manager	64	64	64	64	64	64	64	64	32	32	0	0	\$ 155
Project Manager	0	0	0	0	0	0	0	0	0	0	0	0	\$ 155
Project Administration	16	12	12	12	12	12	12	12	12	12	0	0	\$ 93
Project Accountant	2	2	2	2	2	2	2	2	2	2	0	0	\$ 93
Hours	84	80	80	80	80	80	80	80	48	48	0	0	
FTE	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.3	0.3	0.0	0.0	
Monthly Fee	\$ 11,917	\$ 11,546	\$ 11,546	\$ 11,546	\$ 11,546	\$ 11,546	\$ 11,546	\$ 11,546	\$ 6,602	\$ 6,602	\$ -	\$ -	\$ -