



Jefferson School District 14J  
**BOARD OF DIRECTORS' REGULAR MEETING**  
January 27, 2025 – JSD Board Room  
5:30 PM – Regular Session

## AGENDA

*"We will prepare all students to successfully navigate their transition to life beyond high school by providing qualified, rigorous instruction, providing a safe environment, and fostering a culture of student learning."*

**1. Call Meeting to Order/Flag Salute**

Chair Mitchell

**2. Roll Call**

Chair Mitchell

**3. Review/Adjust/Approve Agenda & Consent Items**

**4. Consent Agenda Items:**

- a. Action Items from 12/9/24.....Board Members  
*Information/Action Page(s)*
- b. Enrollment.....Board Members  
*Information Page(s)*
- c. First Student Update.....Melody Rossitier  
*Information Page(s)*
- d. Personnel Recommendations.....Board Members  
*Information/Action Page(s)*
- e. OSBA Board Policy Updates.....Board Members  
*Information/Action Page(s)*
  - DLC: Expense Reimbursement (version 1), new
  - DLC-AR: Staff Expense Reimbursement, new
  - DLC: Expense Reimbursement, delete
  - EFAA-AR(1): Reimbursable Meals and Milk Programs, updated
  - EFAA-AR(2): Concessions – Food Served, delete
  - GCQAB: Private Tutoring for Pay
  - IGDD: Student Performances
  - JFCJ: Weapons in Schools
  - KL: Public Complaints
  - KL-AR(1): Public Complaints Procedure
  - KL-AR(2): Appeal to the Deputy Superintendent of Public Instruction
- e. WESD 2025-2027 Local Service Plan Resolution 2024-2025 (25.01.01).....Board Members
  - *Information/Action Page(s)*

**5. Reports**

- a. Financial Report.....Hattie Truett  
*Information Page(s)*
- b. Superintendent Update.....Dawn Moorefield  
*Information Page(s)*

c. Administrators Update.....Kymberlee Rhodes, Laura Pierce-Cummings  
Information **Page(s)**

**6. Comments from the Audience**

**7. New Business**

**8. Old Business**

a. Superintendent Evaluation Timeline (Exe Session) Discussion.....Board Members  
Information **Page(s)**

b. JSD Track Committee Work Session Discussion.....Board Members  
Information **Page(s)**

c. Public Meeting Law Training – HB 2805: Section 3 (2)(a).....Board Chair  
Information **Page(s)**

**9. Submitted Public Comments**.....Board Chair

The Jefferson School District Board accepts public comments via email submission. If you would like to submit a comment, please email it and any supporting documents you may have to [Jennifer.Oertel@jefferson.k12.or.us](mailto:Jennifer.Oertel@jefferson.k12.or.us) by 1:00 p.m. on the day of the meeting. Comments will be sent to the JSD Board prior to their meeting and may or may not be read at the board meeting.

**10. Board Comments**

a. General.....Board Members

**11. Adjourn**

Board Chair

**Upcoming Meeting(s):**

**JSD Policy Committee Mtg**

Thursday, January 30, 2025

4:30pm

Superintendent Moorefield's Office

**Regular Monthly – JSD Board Mtg**

Monday, February 10, 2025

5:30pm

JSD Board Room

**Regular Monthly – JSD Board Mtg**

Monday, March 10, 2025

5:30pm

JSD Board Room



## 2024-2025 Board of Directors

Position 1:  
Teri Mitchell, Chair  
Term Expires: 6.30.2027

Position 2:  
Terry Kamlade, Director  
Term Expires: 6.30.2025

Position 3: Carole Vickery, Director  
Term Expires: 6.30.2027

Position 4: Fred Sondermayer, Vice Chair  
Term Expires: 6.30.2025

Position 5: Tracy Roe, Director  
Term Expires: 6.30.2025

## 2024-2025 Subcommittee / Representation

Finance Subcommittee (2):  
Teri Mitchell  
Carole Vickery

Bargaining Subcommittee (2):  
Fred Sondermayer  
Terry Kamlade

Willamette ESD Budget Representation (1):  
Terry Kamlade

Policy Subcommittee (2):  
Tracy Roe  
Carole Vickery

### Strategic Pillars:

- Together, the Jefferson Community, and the Jefferson School District will prioritize funding to provide sufficient staffing, appropriate curriculum, and key programs that will equip our students to succeed.
- Jefferson School District will improve community engagement by focusing on creating purposeful, authentic parent involvement through a shared culture where everyone feels welcomed, respected and appreciated.
- Students will be encouraged to reach their goals using methods that include discovery, self-awareness, self-advocacy, credible choices, and learning collaboration.
- In preparation for their future, students are encouraged to be present and engaged in our safe, welcoming environment as they learn to set goals and adapt to discover their passion.



## **PUBLIC PARTICIPATION AT BOARD MEETINGS**

During each regularly scheduled meeting of the Jefferson School District Board, the agenda will include an item titled “Comments from the Audience.” It is during this portion of the agenda that the public can comment. If requesting to speak, when called on, comments should be limited to three (3) minutes.

Public participation is a time for the Board to listen, not a time for in-depth discussion or to respond 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 administrative staff to respond to after the meeting.

The Jefferson School District Board accepts public comments also via email submission. If you would like to submit a comment, please email it and any supporting documents you may have to [Jennifer.Oertel@jefferson.k12.or.us](mailto:Jennifer.Oertel@jefferson.k12.or.us) by 1:00 p.m. on the day of the board meeting. Submitted comments will be emailed to the Board prior to their meeting and may or may not be read at the Board Meeting. You can also submit comments during a board meeting by clicking on the following link <https://www.jefferson14j.com/live-meetings-and-events> and then selecting “Public Comment.” Comments submitted by the same timeline regarding the 2024-25 Jefferson School District Budget will be read into the record.

As a reminder, the Board cannot review complaints about specific personnel during an open meeting. If a patron has a specific complaint against personnel, please review and follow the process as outlined in Board Policy [KL](#).

The meeting will be live streamed on our website and You Tube, with a link on Facebook. Here is the [link](#) to view the meeting: <https://www.jefferson14j.com/live-meetings-and-events>

If you have any additional questions, please contact [Jennifer.Oertel@jefferson.k12.or.us](mailto:Jennifer.Oertel@jefferson.k12.or.us) and thank you for taking an interest in the Jefferson School District.



## **The Jefferson School Board 14J 2024-2025 Board Goals**

1. The school board members will attend at least 4 school activities annually.
2. The school board members will visit or virtually attend another district's board meeting.
3. The school board will use collaborative processes with the community and district that result in well-informed problem solving and decision making.
4. The school board will work to improve transparency and communication.

### **2024-2025 Board Work Sessions**

8/1/24 - OSBA Board Training 1 of 2

8/29/24 - OSBA Board Training 2 of 2

9/16/24 - Board/Superintendent Goals Operating Agreement,  
Superintendent Evaluation, OSBA Elections, Resolution

9/23/24 - JHS PA System, Superintendent Evaluation

10/28/24 - Resolution, OSEA CBA, Superintendent Evaluation



# Jefferson School District 14J

## **BOARD OF DIRECTORS' REGULAR MEETING: *Motion Samples***

*January 27, 2025 – JSD Board Room*

*5:30 PM – Regular Public Session*

### **Board Motion Samples**

- I move to accept the agenda and consent items as presented.
- I move to approve the WESD Local Service Plan Resolution 2024-2025 (25.01.01).



# Jefferson School District

## **BOARD OF DIRECTORS': *Action Summary***

*December 12, 2024 – Board Room*  
*5:30 PM – Work Session*

### **Board Attendance:**

- ☒ Teri Mitchell, Chair
- ☒ Fred Sondermayer, Vice Chair
- ☒ Terry Kamlade
- ☒ Tracy Roe
- ☒ Carole Vickery

### **Administration:**

- ☒ Dawn Moorefield, Superintendent
- ☒ Hattie Truett, Business Manager
- ☒ Jennifer Oertel, Board Secretary

### **JHS Student Representative:**

- ☐ Parker Siegwarth

**Public Session Opened: 5:30 PM**

**Chair Mitchell held roll call:** All board members present, JHS Rep Parker Siegwarth absent.

The Board:

- moved to accept the agenda and consent items as presented with the exception of moving 7. New Business before 5. Reports. Director Roe motioned, and Director Kamlade seconded the motion, the motion passed with the following votes.

Yes Vote:

Chair Mitchell  
Vice Chair Sondermayer  
Director Kamlade  
Director Vickery  
Director Roe

Opposed Vote:

Abstention Vote:

- moved to name the Jefferson School District sports fields "Grizzel Field" in honor of Coach Forrest Grizzel. Director Vickery motioned, and Director Kamlade seconded the motion, the motion passed with the following votes.

Yes Vote:

Chair Mitchell  
Vice Chair Sondermayer  
Director Kamlade  
Director Vickery  
Director Roe

Opposed Vote:

Abstention Vote:

**Adjourn Regular Session: 7:33 PM**



Jefferson School District 14J  
**BOARD OF DIRECTORS' REGULAR MEETING**  
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5:30 PM – Regular Public Session

District Enrollment by Grade Level  
2020-21, 2021-22, 2022-23, 2023-24, 2024-25

GRADE	S-20	S-21	S-22	S-23	S-24	O-20	O-21	O22	O23	O24	N-20	N-21	N-22	N-23	N-24	D-20	D-21	D-22	D-23	D-24	J-21	J-22	J-23	J-24	F-21	F-22	F-23	F-24	M-21	M-22	M-23	M-24	A-21	A-22	A-23	A-24	M-21	M-22	M-23	M-24	J-21	J-22	J-23	J-24
K	51	52	57	42	41	51	50	59	42	40	50	50	59	39	41	49	53	58	38	41	48	52	56	38	47	50	56	38	50	49	55	36	49	50	55	36	50	50	56	36	46	49	55	36
1	46	52	54	49	38	47	48	53	50	38	46	49	51	50	38	46	49	51	50	37	47	49	50	51	49	47	50	51	51	45	50	51	49	48	50	51	49	50	52	50	49	49	51	49
2	61	51	49	49	45	60	54	48	53	46	59	55	48	52	47	59	56	47	52	47	58	55	47	53	57	56	48	54	58	57	48	51	61	58	47	49	63	58	47	49	64	58	47	50
3	54	65	59	45	50	54	67	58	45	49	54	67	56	46	47	52	65	54	46	46	52	65	54	45	51	64	54	46	52	65	54	46	55	65	54	46	56	64	54	46	56	65	53	45
4	67	54	66	51	47	66	52	66	51	46	65	53	66	50	46	64	51	67	52	46	62	49	68	52	62	49	69	53	63	48	67	50	67	48	67	51	67	46	67	51	67	46	66	50
5	57	66	50	62	51	55	67	51	64	49	55	67	49	63	49	54	67	49	63	47	55	66	49	64	56	67	50	64	57	67	50	61	55	67	50	61	57	66	49	62	57	66	49	62
6	58	63	64	57	59	60	63	65	58	59	60	62	65	57	59	60	64	65	58	60	63	63	65	55	62	61	67	55	65	59	68	54	66	61	66	54	68	60	66	54	68	60	66	54
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8	72	67	67	56	64	71	66	68	58	64	70	64	66	57	64	70	63	66	54	63	68	64	65	57	69	63	67	56	71	61	66	72	72	62	67	57	73	62	68	56	73	59	67	56
9	71	77	62	64	57	71	74	61	64	58	69	74	57	64	58	70	71	58	63	59	69	70	57	67	69	68	57	63	70	68	56	63	70	70	51	59	70	67	51	59	71	68	50	59
10	64	69	64	54	63	65	67	68	55	65	66	66	65	55	65	66	67	65	57	65	66	67	66	54	67	67	66	52	65	65	65	51	64	65	65	51	65	65	51	66	65	65	49	
11	60	64	58	63	55	59	62	60	63	55	58	62	55	63	56	58	63	53	58	57	59	62	52	63	59	59	52	63	57	59	53	63	57	60	53	63	57	57	53	62	56	57	53	63
12	61	63	57	57	69	61	59	58	57	69	62	58	56	56	71	62	58	56	67	72	62	56	57	55	62	56	53	54	61	56	51	53	61	58	50	48	61	57	50	49	61	53	49	0
TOTAL	787	807	766	716	694	783	794	774	728	693	777	792	752	720	696	773	791	748	725	696	773	780	743	721	773	769	746	717	784	760	740	719	790	775	732	694	800	765	736	693	798	757	729	641

As of December 31, 2024 ADM: 635.60



# Transportation Update

## Jefferson School District

Date: January 6, 2025

Dear School Board Members,

We're pleased to provide you with an update of activities at our location. In this month's report, you'll find the status of driver staffing as well as progress made on open issues. Also included are summaries of community activities and other noteworthy events that are coming up.

### 1. Driver Staffing & Recruiting Incentives

We are working diligently to increase the applicant flow through recruiting campaigns.

- \$22.30 – \$23.69 DOE
- Paid Training
- \$500. Employee Referral Bonus

### 2. Recruiting Activities/Events

- *Indeed, Craigslist, Facebook*
- *Digital Advertising*
- *Banners*

<b>Route Count</b>	<b>11</b>
<b>Driver Staffing Goal</b>	<b>17</b>
Drivers assigned to a route	11
Cover drivers	5
Borrowed drivers	0
Total drivers	16
Over/(Short) for route coverage	+5
<b>Drivers in Training/Testing</b>	<b>0</b>
Apps this Month	0
Permit Pending	0
Total # in training (Classroom)	0
Behind-the-wheel training	0
Leave/ Unavailable	0

### 3. Recruiting / Hiring Barriers

- *This month we had an excellent applicant interview to become a school bus driver. She has now taken all 4 tests at DMV and received her Commercial Learners Permit. Stacy Wells has been entered into the training program and will begin her journey to become a fully qualified school bus driver.*

## 4. Successes for the Month

- *This month we had a fun variety of trips, Kinders traveled to the Linn County Fairgrounds, and 2<sup>nd</sup> grade to the Heritage Mall. An all-MS trip to OSU – Gill Coliseum for a basketball game was on the schedule. The MS band also traveled to Keizer for the Light Parade, basketball and wrestling also traveled from the MS. Our high school sent students to Chemeketa Community College in December. They also sent the National Honor Society to Woodmansee Park in Salem. Basketball also traveled from the HS.*

## 5. Customer Issues/Resolutions

- *No issues this month.*

## 6. Technology Updates / Available Technology

- ***FirstView District Dashboard and Parent Tracking App-*** *We are on the list to be onboarded with the New FirstView product but now it appears like it will be closer to March before they get us up and ready for training. After the District Dashboard training it will be available for parents, as an app on their phones. Links have been made available for the district for learn more about FirstView.*

## 7. Routing Updates

Buses arrived on time and counts are below:

- Route 1 – AM 23; PM 25
- Route 2 – AM 22; PM 25
- Route 3 – AM 29; PM 33
- Route 4 – AM 40; PM 55 (intown route, makes 2 rounds)
- Route 6 – AM 43; PM 54 (intown route, makes 2 rounds)
- Route 7 – AM 29; PM 27
- Route 8 – AM 25; PM 28
- Route 9 – AM 47; PM 64 (intown route, makes 2 rounds)
- Willamette Career Academy – AM/PM; 11
- Route 18 – MV to Albany - 1
- Route 20 – AM 11; PM 11 (Special Ed bus)

## 8. Items of interest

- The monthly training topic was Setting the Highest Standard, it's always good to get together for a training.
- December weather was seasonably warm, so far, we have not had to check roads!
- This month some of our drivers attended an ODE training, they took a class on "Special

Driving Conditions,” which covered lots of different conditions we face on the road as school bus drivers. We also offered a state approved class on, “Trip Driving.” Drivers are required each year to have 8 hours of state approved continuing education. Each of these classes qualified for 2 hours of training.

Thank you for letting us serve you,



**Melody Rossiter**

Jefferson First Student, Transportation Manager



## **Personnel Recommendations: January 2025**

### *New Employee(s):*

<u>Employee</u>	<u>Position</u>	<u>Location</u>
Sierra Mollers	Food Services Assistant	High School
Anne Vela	Temp Substitute Teacher-1 <sup>st</sup> Grade	Elementary

### *Employee Position Change(s):*

<u>Employee</u>	<u>Position</u>	<u>Location</u>
Abigail Darby	Emotional Growth Teacher	Elementary
Baylee Lampman	Life Skills Teacher	Elementary

*The Administration would like to make the board aware of other personnel changes.*

### *Employee Resignation(s):*

<u>Employee</u>	<u>Position</u>	<u>Location</u>
Heather Anderson	Temp Substitute Teacher-1 <sup>st</sup> Grade	Elementary

# OSBA Model Sample Policy

Code: DLC  
Adopted:

## Expense Reimbursements \*

(Version 1)

The district will reimburse employees for authorized expenses incurred for professional growth and/or job requirements in accordance with administrative regulations developed by the superintendent and consistent with Internal Revenue Service requirements.

END OF POLICY

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### Legal Reference(s):

[ORS 294.155](#)

[ORS 332.107](#)

[OAR 581-022-2260](#)

I.R.C. § 162 (2006); Business Expenses, 26 C.F.R. 1.162-1 (2006).

INTERNAL REVENUE SERVICE, PUBLICATION 463: TRAVEL, ENTERTAINMENT, GIFT AND CAR EXPENSES.

# OSBA Model Sample Policy

Code: DLC-AR  
Revised/Reviewed:

## Staff Expense Reimbursement

Expense reimbursement for staff traveling on approved district business will be governed by the following procedures. Travel expenses include travel fares, meals and lodging and expenses incident to travel. Only travel expenses as are ordinary and necessary in the conduct of approved travel for district business purposes and directly attributable to it will be reimbursed. As used in this regulation an “ordinary” expense means one that is common and accepted in the profession; a “necessary” expense means one that is essential and appropriate in order to conduct district business. [Reimbursement procedures established by the district will also apply to Board members traveling on [Board-approved] district business, as applicable.]

### **In-District Travel—Use of Private Vehicles**

1. Staff will use district-owned vehicles, whenever possible, in conducting district business that requires travel within district boundaries.
2. Private vehicles may be used in conducting district business only with prior [principal] approval. In-district travel approval may be granted by the [principal] for individual trips or by blanket approval, as deemed appropriate.
3. Travel in a private vehicle for the purpose of conducting district business may be approved when:
  - a. A district vehicle is not available;
  - b. The destination is not conveniently accessible by commercial carrier;
  - c. Various points must be visited and commercial carrier schedules are such that the use of commercial carrier transportation is not practical;
  - d. Carrying articles by commercial carrier would not be feasible;
  - e. Commercial travel is deemed to be less economical.

### **Out-of-District Travel (In-state)—Use of Private Vehicles**

1. Staff will use district-owned vehicles, whenever possible, in conducting approved district business that requires in-state travel outside district boundaries.
2. Private vehicles may be used only with prior approval from the [superintendent] [principal] [business manager]. Out-of-district travel approval may be granted by the [superintendent] [principal] [business manager] for individual trips or by blanket approval, as deemed appropriate.

### **Out-of-State Travel**

Out-of-state travel requires prior approval from the [Board] [superintendent].

## Authorization

1. All meeting, training, conference, or travel expenditures must be within appropriated and available funds of the district.
2. All meeting, training, conference, or travel expenditures must be authorized by the appropriate immediate supervisor and/or administrator **prior to departure**. Administrator expenditures are to be approved by the superintendent. ~~or assistant superintendent~~

## Use of Private Vehicles

1. Staff will use district-owned vehicles, whenever possible, in conducting district business that requires travel within district boundaries.
2. Private vehicles may be used in conducting district business only with prior building principal or administrator approval.
3. Travel in a private vehicle for the purpose of conducting district business may be approved when:
  - a. A district vehicle is not available;
  - b. The destination is not conveniently accessible by commercial carrier;
  - c. Various points must be visited and commercial carrier schedules are such that the use of commercial carrier transportation is not practical;
  - d. Carrying articles by commercial carrier would not be feasible;
  - e. Commercial travel is deemed to be less economical; or
  - f. Other circumstances are approved by an administrator.
4. Non-represented employees—refer to the current bargaining contract for language on eligible mileage costs.
5. Mileage rates are based upon the federal IRS rate unless otherwise specified in an employee contract.

## 6. Insurance Coverage

- a. Insurance costs are included as part of the mileage reimbursement for employees authorized to use a private vehicle to conduct district business. It is the responsibility of the owner or driver of the vehicle to be certain that the vehicle is adequately covered by insurance.
- b. The responsibility of the district for damages resulting from vehicle accidents is not the same as set forth in the district's general liability insurance policy. The employee's insurance coverage provides primary coverage when the employee is driving their own vehicle on approved district business.
- c. All district employees operating private vehicles on approved district business are required to complete and maintain on file with the district verification of vehicle liability insurance that meets or exceeds Oregon statutory minimum limits. This verification is required prior to any district approval to conduct district business in a private vehicle. Employees are required to update their verification of vehicle liability information maintained on file with the district upon **any** change in the employee's vehicle insurance coverage.

## Insurance Coverage

1. Insurance costs are included as part of the mileage reimbursement for employees authorized to use a private vehicle to conduct district business. It is the responsibility of the owner or driver of the vehicle to be certain that the vehicle is adequately covered by insurance.
2. The responsibility of the district for damages resulting from vehicle accidents is not the same as set forth in the district's general liability insurance policy. The employee's insurance coverage provides primary coverage when the employee is driving the employee's own vehicle on approved district business.
3. All district employees operating private vehicles on approved district business are required to complete and maintain on file with the district verification of vehicle liability insurance that meets or exceeds Oregon statutory minimum limits. This verification is required [annually] [prior to any district approval to conduct district business in a private vehicle]. Employees are required to update their verification of vehicle liability information maintained on file with the district upon any change in the employee's vehicle insurance coverage.

## Meals and Meetings

1. Reimbursement will be made for ordinary and necessary meal expenses incurred in the course of approved travel for district business. Meals include amounts spent for food, beverage, taxes and related gratuities. Alcoholic beverages will not be reimbursed by the district. See **Expense Reimbursement Request and Accounting Procedures** below.
2. Expenses in excess of the district's established limit are ordinarily the responsibility of the employee and may be reimbursed only with approval from the superintendent. Receipts for all meal expenses must be secured and attached to the claim.

## Travel Advances

1. All costs feasible such as travel, lodging, and registrations shall be paid directly by the district to the vendor. A travel advance may be requested when the estimated cost for meals, lodging, shuttles, and parking, etc., exceeds [\$50]. The travel advance may be requested by completing the form provided by the district, and providing proper documentation.
2. The cost of commercial travel tickets will not be included in a cash advance request.
3. In the event of loss, the employee is personally responsible for cash advances issued and for any third party use of a district-provided credit card.
4. At least [15] working days are required for processing an advance check after the approved request is received by the business office.
5. Only one cash advance may be outstanding to any employee at any time. Unused excess funds will be returned to the district within 15 days of travel.



## Reservations, Commercial Carrier and Lodging

1. Travel must be conducted in the most expeditious and cost-effective manner, as determined by the district.
2. Each employee is responsible for making their own reservations by obtaining a purchase order number from the business office and furnishing that number to the local travel agency or commercial carrier.
3. [Individuals traveling on approved district business by a carrier offering travel credits (i.e., frequent flyer mileage, etc.) are required to account for credits received and may use the credits for future approved district travel purposes only.] [The district prohibits the accrual of travel credits for individuals traveling on approved district business.]

## Reservations, Commercial Carrier, and Lodging

1. Travel must be conducted in the most expeditious and cost-effective manner, considering the total cost of the travel package, as determined by the district. If an employee chooses to use an alternative mode of transportation other than the most cost-effective total travel package, the additional cost will be picked up by the employee as a personal expense. When more than one employee is attending, carpooling is encouraged.
2. Each employee is responsible for obtaining proper authorization prior to making their own reservations. Normal district accounting and purchasing methods are to be utilized when making travel arrangements.

## Vehicle Rentals

1. Rental vehicles may be used only when use will affect a savings or otherwise be more advantageous to the district or when the use of other transportation is not feasible.
2. Rental of a compact vehicle is recommended when suitable for approved district business because of the lower initial rate and the guaranteed rate. Certain rental agencies guarantee the compact rate in all owned stations and in most licensee stations, which means that if a reservation for a compact vehicle is accepted and one is not available, a standard-sized vehicle will be substituted at the compact rate.
3. Rental vehicles will be used only for official travel or in lieu of taxi for necessary travel. Any additional costs incurred for other usage will be the personal responsibility of the traveler.

Employees will be informed if the district carries the rental car endorsement as part of its insurance coverage. In the event the district does not carry the rental car endorsement the employee will be authorized to purchase insurance coverage from the rental agency.

4. Fuel purchased for rental vehicles may be reimbursed with the original receipt documenting the purchase and accompanied by the vehicle rental contract.
5. Employees must rent the vehicle in the name of Jefferson School District in order to be covered under the district's rental car insurance endorsement. If the employee rents the vehicle in the employee's name then the employee's insurance prevails. It is important to note that an individual's personal insurance may not provide the same level of insurance as the district's thereby creating a more significant risk loss potential.

## Cancelled Trips

If an employee cannot leave at the scheduled time, it is the employee's responsibility to call the travel agency or carrier and arrange to have the tickets cancelled or exchanged.

Commercial carrier reservation cancellations must be made at least 24 hours before departure time, whenever possible.

Lodging reservations must be cancelled by the employee as soon as possible to avoid a cancellation charge.

If a trip is cancelled after an advance and/or tickets have been issued, the advance and tickets must be returned to the business office immediately.

1. If an employee cannot leave at the scheduled time, it is their responsibility to call the travel agency or carrier and arrange to have the tickets cancelled for a refund or exchanged. The traveler is required to take all steps necessary to secure such refunds. The refunds are the property of the district.
2. Commercial carrier reservation cancellations must be made at least 24 hours before departure time, whenever possible.
3. Lodging reservations must be cancelled by the employee as soon as possible to avoid a cancellation charge.
4. If a trip is cancelled after a travel advance and/or tickets have been issued, the travel advance and tickets must be returned to the Business Services Department Office immediately.

## Personal Travel Combined with District Business Travel

1. If an individual traveling on approved district business engages in both business and personal activities, travel expenses incurred will be reimbursed only for expenses that are ordinary and necessary in the conduct of district business. Expenses incurred as a part of personal business are the sole responsibility of the traveler.
2. When personal travel is combined with approved district business travel and the individual is traveling by less than the most expeditious and cost-effective manner, any additional costs must be paid by the traveler.
3. Time away from work caused by traveling by less than the most expeditious means available for personal purposes must be charged to vacation or other appropriate leave.
4. Vacation or other personal leave may be taken in conjunction with approved district travel subject to the following:
  - a. Time delays related to approved district business are charged as working time even if no work is performed;
  - b. If the employee travels by less than the most cost-effective manner, as determined by the district, for approved district business or for personal travel combined with travel for district business

- purposes, the employee must pay the additional cost (e.g., increased fare, meals, lodging expenses, etc.) incurred as a result of the personal travel;
- c. All subsistence and local transportation (e.g., taxi, vehicle fare) while on vacation status or other appropriate leave must be paid by the employee;
  - d. The traveler will not be required to pay any of the basic transportation costs incurred as a part of the approved district business, even though the traveler spends a substantial part of the total time away from home on vacation or other personal leave, provided the employee was traveling on approved district business;
  - e. A traveler who decides on their own to conduct district business without prior approval, while on vacation or other personal leave, cannot then use this as a justification to have the district pay basic transportation cost from the district to the location visited, or submit a request for other expense reimbursement.

## **Expense Reimbursement Request and Accounting Procedures**

1. Reimbursement requests detailing actual expenditures must be submitted on the district's travel expense form and approved by the [superintendent] in writing. Receipts and supporting documentation must accompany all expense reimbursement requests. This includes, but is not limited to, receipts for transportation, lodging, meals, registration, conference and workshop fees. All requests must be submitted to the district office within [10] working days of the conclusion of the trip.
  - a. If the completed travel expense report totals less than the travel advance, the difference must be returned within [10] working days to the business office with the report.
  - b. Reimbursement for expenditures in excess of a travel advance, or where no travel advance has been requested, will be made within [30] working days after the approved travel expense report is received by the business office.
2. Expenses which consist primarily of the cost of furnishing meals for others will be reimbursed upon submission of a travel expense report which includes:
  - a. Names of guests;
  - b. Organizations involved;
  - c. Full explanation of the district business purpose of the meeting.
3. In the event a vehicle was rented, a copy of the rental agreement must be attached to the travel expense report. The rental charge should be paid from the amount advanced, as applicable. Purchase of gas and oil which have been deducted from the rental charge by the rental agency must be included.
4. Any claim for mileage reimbursement only may be submitted at the end of each month in which reimbursement is to be claimed. A claim must be submitted no later than [90] calendar days of incurring the expense. Reimbursement claims later than [90] calendar days of the expense will be denied.
5. Mileage for approved district business travel in a private vehicle will be reimbursed at the current rate per mile established by the district, collective bargaining agreement or Internal Revenue Service (IRS), as applicable. Reimbursement that exceeds the IRS rate will be included as income to the employee in accordance with IRS regulations.
6. Meal expenses for approved district business travel purposes may be reportable as income to the employee in accordance with IRS regulations. Generally, meal expenses incurred for approved district

business purposes in which district business is conducted with at least one or more other persons or that is incurred on approved district business for a trip that is overnight, or long enough that the individual needs to stop for sleep or rest to properly perform assigned duties, as defined by the IRS, will not be reportable as income to the employee.

7. In the event the total of the amount charged to, and/or received from, the district by the employee as advances, reimbursement or otherwise, exceeds the ordinary and necessary business expenses, the excess must be reported as income in accordance with IRS requirements.

1. Reimbursement requests detailing actual expenditures must be submitted on the district's travel expense form and approved by the administrator or designee in writing. Original itemized receipts and supporting documentation must accompany all expense reimbursement requests. This includes, but is not limited to, itemized receipts for transportation, lodging, registration, conference, and workshop fees. Meals are to be on the per diem allowance method. All requests must follow normal accounting procedures and work with the responsible site administration to be submitted to the district office within 15 working days of the conclusion of the trip.
  - a. If the completed travel expense report totals less than the travel advance, the difference must be returned within 15 working days to the business office with the report.
  - b. Reimbursement for expenditures in excess of a travel advance, or where no travel advance has been requested, will be made within 30 working days after the approved travel expense report is received by the business office.
2. Expenses which consist primarily of the cost of furnishing meals for others will be reimbursed upon submission of a travel expense report which includes:
  - a. Names of guests;
  - b. Organizations involved; and
  - c. Full explanation of the district business purpose of the meeting.
3. In the event a vehicle was rented, an itemized invoice must be attached to the travel expense report. The rental charge should be paid from the amount advanced, as applicable. Purchase of gas and oil which have been deducted from the rental charge by the rental agency must be included.
4. All claims for mileage reimbursement must be submitted within 60 days in which the expense was incurred. Reimbursement claims for expenses incurred after 60 days may be denied, at the discretion of the **business manager** ~~finance and operations director~~.
5. Mileage for approved district business travel in a private vehicle will be reimbursed at the current rate per mile established by the district, collective bargaining agreement or Internal Revenue Service (IRS), as applicable. Reimbursement that exceeds the IRS rate will be included as income to the employee in accordance with IRS regulations.
6. Meal per diem allowances are provided for approved district business purposes for a trip that is overnight, or long enough that the individual conducting business or attending training is away from the regular workplace and cannot access meals through normal channels and still perform their duties. Meal per diem allowances approved for district business travel purposes are generally not reportable as income to the employee as long as the per diem does not exceed the federal meal per diem guidelines as in accordance with IRS regulations.

7. In the event the total amount of travel advances, reimbursements, or otherwise charged to, and/or received from the district by the employee exceeds the ordinary and necessary business expenses and/or the federal meal per diem guidelines, the excess must be reported as income in accordance with IRS requirements.
8. Group travel may be requested on one travel request form for a group traveling together as long as travel advances and reimbursements are payable to one person who has complete responsibility for reporting expenses.

### **Reimbursable Expense Limitations**

1. ~~[Meal expenses may be reimbursed subject to the following limitations:~~

Allowance:	Breakfast	[\$11]
	Lunch	[\$12]
	Dinner	[\$23]

**OR**

1. <sup>†</sup>~~[The district may establish a daily per diem rate [not to exceed the IRS recommendations] that covers all meal expenses.]~~
2. ~~Gratuities must not exceed [15] percent and must be included as a part of the receipt. Gratuities in excess of [15] percent are the responsibility of the employee and will not be reimbursed by the district.~~
3. ~~Other expenses such as toll charges, parking fees, valet services, cleaning, pressing and laundry may be reimbursed if length of trip or circumstances demand.~~
4. ~~Mileage reimbursement for actual miles traveled on district business, may be approved subject to the following limitations:~~
  - a. ~~In district mileage reimbursement will not be granted to an employee, other than a district approved tutor, for traveling from the employee's residence to the place where work begins for the day or for returning home from the last place worked during the day;~~
  - b. ~~Reimbursement will be made only for those miles actually traveled in the course of completing approved district business. When chauffeured, mileage for two round trips and short term parking will be reimbursed if not greater than the cost of one round trip plus economy parking;~~
  - c. ~~Group travel may be requested on one travel request form for a group traveling together as long as advance and reimbursement is payable to one person who has complete responsibility for reporting expenses;~~
  - d. ~~In the event a private vehicle is approved for use from home, to or from airport or railroad station, mileage for one round trip and economy parking will be reimbursed. Parking receipts are required;~~
  - e. ~~Individuals requesting reimbursement for use of a private vehicle on approved district business must meet insurance requirements. See **Insurance Coverage** above.~~
5. ~~Lodging will be reimbursed at reasonable commercial rates.~~

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<sup>†</sup> ~~[If this option for Item #1 is chosen, delete #2 that follows and renumber the remaining items.]~~

6. Local taxi, shuttle, bus fares and vehicle rentals may be reimbursed, subject to the district's requirement that travel selected is by the most expeditious, cost-effective manner, as determined by the district

### Travel Expense Limitations

1. Meal expenses are covered on a per diem allowance basis. No receipts or unused amounts are required to be submitted with reimbursement requests. Allowable meal per diem rates are based on the [U.S. General Services Administration \(GSA\) rates](#). These are tiered rates, based on location, and are set by fiscal year, effective October 1 of each year. If the travel location isn't specified within the GSA charts, the Standard CONUS (contiguous United States) Rate will be applied.
2. Per diem allowances will not be issued for meals included as part of a conference or training event.
3. Gratuities in excess of the per diem limits are the responsibility of the employee and will not be reimbursed by the district.
4. Mileage reimbursement for actual miles traveled on district business may be approved subject to the following limitations:
  - a. Reimbursement will be made only for those miles actually traveled in the course of completing approved district business;
  - b. Group travel may be requested on one travel request form for a group traveling together as long as travel advances and reimbursements are payable to one person who has complete responsibility for reporting expenses;
  - c. In the event a private vehicle is approved for use from home, to or from airport or railroad station, mileage for one round trip and economy parking will be reimbursed. Parking receipts are required; and
  - d. Individuals requesting reimbursement for use of a private vehicle on approved district business must meet insurance requirements. See **Insurance Coverage** above.
5. Lodging will be reimbursed based on the [U.S. General Services Administration \(GSA\) rates](#). These are tiered rates, based on location and month, and are set by fiscal year, effective October 1 of each year. If the travel location isn't specified within the GSA charts, the Standard CONUS (contiguous United States) Rate will be applied.
6. Taxi, rideshare, shuttle, bus fares, parking fees, toll charges, and vehicle rentals may be reimbursed, subject to the district's requirement that the travel selected is by the most expeditious, cost-effective manner, as determined by the district.
7. Other reasonable expenses not specifically covered in this administrative rule may be reimbursed if within appropriated and available funds and authorized by the superintendent or **business manager finance and operations director**.

# Jefferson School District 14J

Code: **DLC**  
Adopted: 9/10/07  
Revised/Readopted: 5/13/19  
Orig. Code: DLC

## Expense Reimbursements

The employee will complete and expenditure reimbursement form, attaching receipts and/or supporting documents as required and submitting the claim to the district office for approval. Approved claims will be forwarded to the business office for payment.

### Meals

Receipts are not required for actual costs of meals. The district may establish a daily per diem rate not to exceed the IRS recommendations to cover reimbursement of meal expenses.

Meal expenses controlled by conference/meeting organizers and/or other unusual circumstances shall be reimbursed at full cost with attached receipt and/or supporting documentation.

Meals associated with daily work responsibilities which are considered to be usual and customary are not reimbursable. Exceptions must be approved in advance by the district and be supported by a receipt or written documentation.

Reimbursement may be claimed for the cost of “guest” (i.e., constituent, district personnel, vendors, academic associates) meals only when the guest has performed a service for the district and be supported for same from any source. A brief explanation of activity must be attached.

### Lodging

Reimbursement for conference lodging shall be pre-approved by the district. Receipt(s) must be attached for all lodging (including pre-paid or conference accommodations). Receipt(s) must contain employee’s name, date(s) of occupancy, room number and room rate. Cost for family member(s) shall be kept separate and at personal expense.

### Registration Fees

Receipts must be attached to claim form unless prepaid by business office. Entertainment expenses are not reimbursable.

### Telephone Calls

Receipts or supporting documentation must be attached for long distance telephone calls and/or facsimile transmission charges for official business exceeding \$5. Receipts are not required for daily personal phone calls while on overnight trips and are reimbursed for actual cost up to \$5 maximum.

## Miscellaneous

Receipts or supporting documentation must be attached for actual miscellaneous expenses exceeding \$10. Examples include, but are not limited to, valet/porter service, parking, postage and car rental or cab/bus fare.

END OF POLICY

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### Legal Reference(s):

[ORS 294.155](#)

[ORS 332.107](#)

[OAR 581-022-2260](#)

I.R.C. § 162 (2006); Business Expenses, 26 C.F.R. 1.162-1 (2006).

INTERNAL REVENUE SERVICE, PUBLICATION 463: TRAVEL, ENTERTAINMENT, GIFT AND CAR EXPENSES.

### Cross Reference(s):

BHD - Board Member Compensation and Expense Reimbursement

EEBB - Use of Private Vehicles for District Business

DELETE



# Jefferson School District 14J

Code: EFAA-AR  
Adopted: 7/10/17  
Revised/Readopted: 6/10/19  
Orig. Code: EFAA-AR(1)

## Reimbursable ~~School~~ Meals and Milk Programs (National School Lunch Program, School Breakfast Program and other meal programs)

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

### Meal Pricing Procedures

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

### Application Procedures

1. Households receiving SNAP or Temporary Assistance to Needy Families (TANF) benefits as identified by Oregon Department of Education (ODE), will be automatically eligible for free meals, ~~[,] [and] [afterschool snacks] [milk]~~, for the students listed on the official document. Districts must access this document at least three times per year.
2. Students receiving support through the migrant education program, Runaway and Homeless Youth Act, McKinney-Vento Homeless Assistance Act, federal Head Start and state-funded prekindergarten programs, with income eligibility criteria identical or more stringent than federal Head Start, or are in state or court placement foster care, will be automatically eligible for free meals, ~~[,] [and] [afterschool snacks] [milk]~~, for the students listed on the official documents.
3. Households that submit a confidential application will be notified of their student's eligibility for free or reduced-price meals ~~for free milk~~. Households that are denied free or reduced-price benefits will be notified in writing using the ODE template letter distributed to the district annually.
4. On a case-by-case basis, when a student is known to be eligible for free or reduced-price meal ~~for free milk~~ benefits, and the household fails to submit a confidential application, the superintendent or designee may complete an application for the student documenting how they know ~~he/she knows~~ the household income qualifies the student for free or reduced-price meal benefits. Parents of a student approved for free or reduced-price benefits, when application is made for the student by a school official, will be notified of the decision and given the opportunity to decline benefits.
5. Students who do not qualify for free or reduced-price meals ~~for free milk~~ are eligible to participate in the ~~[SMP],~~ National School Lunch Program (NSLP) ~~[and School Breakfast Program (SBP)]~~ and will be charged "paid" prices set by the district. "Paid" category students will be treated equally to students receiving free or reduced-price benefits in every aspect of the district's NSLP ~~[,] [and] [SMP] [, SBP] [, Child and Adult Care Food Program (CACFP)] [, and and Summer Food Service Program (SFSP)]~~.
6. The district has established a fair hearing process under which a household can appeal a decision with respect to the household's application for benefits or any subsequent reduction or termination of benefits.
7. In the event of major employers contemplating large layoffs in the attendance area of the district, the district will provide confidential applications and eligibility criteria for free and reduced-price meals ~~for free milk~~ to the employer for distribution to affected employees.

### **Financial Management of the Nonprofit School Food Service**

1. The district will maintain a nonprofit school nutrition and food service operation.
2. Revenues earned by the school nutrition and food services will be used only for the operation or improvement of NSLP ~~[,] [and] [SMP] [, SBP] [, CACFP] and and SFSP~~.

3. Lunch and breakfast meals served to teachers, administrators, custodians and other adults not directly involved with the operation of the district's nutrition and food services will be priced to cover all direct and indirect cost of preparing and serving the meal.<sup>1</sup>
4. District nutrition and food services revenues will not be used to purchase land or buildings.
5. The district will limit its nutrition and food services net cash resources to an amount that does not exceed three months average expenditures.
6. The district will maintain effective control and accountability for, and adequately safeguard, all nutrition and food services' cash, real and personal property, equipment and other assets, and ensure they are used solely for nutrition and food services purposes.
7. The district will meet the requirements for allowable NSLP[, and] [SMP] [, SBP] [, CACFP] [and and SFSP] costs as described in 2 C.F.R. § 200.
8. In purchasing nutrition and food services goods or services, the district will not accept proposals or bids from any party that has developed or drafted specifications, requirements, statements of work, invitations for bids, requests for proposals, contract terms and conditions or other documents for proposals used to conduct the procurement.
9. All procurement transactions for nutrition and food services goods and services will be conducted according to state, federal and district procurement standards using the applicable cost thresholds.
10. In the operation of its nutrition and food services program, the district will purchase food products where at least 50 percent of the ingredients are produced or processed in the United States, whenever possible.
- ~~11. [The district may use facilities, equipment and personnel supported with nutrition and food services revenue to support a nonprofit nutrition program for the elderly.]~~

### Civil Rights and Confidentiality Procedures

1. The district will not discriminate against any student because of their~~his/her~~ eligibility for free or reduced-price meals.
2. The district will not discriminate against any student or any nutrition and food services employee because of race, color, national origin, marital status, sex, sexual orientation, parental status, religion, age or disability.
3. The district will assure that all students and nutrition and food services employees are not subject to different treatment, disparate impact or a hostile environment.
4. Established district procedures will be followed for receiving and processing civil rights complaints related to applications for NSLP[, and] [SMP] [, SBP] [, CACFP] [and and SFSP] benefits and services, and employment practices with regard to the operation of its NSLP[, and] [SMP] [NSLP, SBP] [, CACFP] [and and SFSP]. The district will forward any civil rights complaint regarding the

<sup>1</sup> For meals with portion sizes equivalent to student meals, the adult meal price will be no less than the amount of reimbursement for a free-eligible meal, plus the value of commodity foods used in the meal preparation.

district's nutrition and food services to ODE's director of Child Nutrition Programs within three days of receiving the complaint.

5. The district will make written or oral translations of all nutrition and food services materials available to all households who do not read or speak English.
6. The district will maintain strict confidentiality of all information obtained through a confidential application for free and reduced-price meals ~~[or free milk]~~ or direct certification, including students' eligibility for free or reduced-price meals and all household information. The district's NSLP, ~~[and]~~ ~~[SMP]~~ ~~[SBP]~~ ~~[CACFP]~~ ~~[and]~~ ~~[and]~~ SFSP operators are not required to release any information from a student's confidential application for free or reduced-price meals ~~[or free milk]~~. No information may be released from a student's eligibility information without first obtaining written permission from the student's parent or legal guardian/adult household member signing the application, except as follows:
  - a. An individual student's name and eligibility status may be released without written consent only to persons who operate or administer federal education programs; persons who operate or administer state education or state health programs at the state level; persons evaluating state, education assessment; or persons who operate or administer any other NSLP, SBP, SMP, CACFP, SFSP or SNAP;
  - b. Any other confidential information contained in the confidential application for free and reduced-price meals or free milk (e.g., family income, address, etc.) may be released without written consent only to persons who operate or administer the NSLP, SBP, SMP, CACFP, SFSP and the Special Supplemental Nutrition Program for Women, Infants and Children (WIC); the Comptroller General of the United States for audit purposes; and federal, state or local law enforcement officials investigating alleged violation of any of the programs listed above.

## Nutrition and Menu Planning

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

## Use and Control of Commodity Foods

1. The district will accept and use commodity foods in as large a quantity as may be efficiently utilized in the NSLP ~~[,]~~ ~~[SBP and]~~ ~~[SBP]~~ ~~and~~ SFSP ~~].~~
2. The district will maintain necessary safeguards to prevent theft or spoilage of commodity foods.
3. The value of commodity foods used for any food production other than NSLP, SBP, SFSP or afterschool snacks shall be replaced in the food service inventory.

## Accuracy of Reimbursement Claims

1. The district will claim reimbursement only for reimbursable meals ~~[,]~~ ~~[and]~~ ~~[afterschool snacks]~~ ~~[milk]~~ served to eligible children.

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

### **Food Safety and Sanitation Inspections**

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

### **General USDA NSLP/SBP/SMP Requirements**

1. The district will ensure that no student is denied a meal as a disciplinary action.
2. Breakfast will be served in the morning hours, at or near the beginning of the student’s school day.
3. Lunch will be served between the hours of 10 a.m. and 2 p.m.
4. The district will provide substitute foods for students with a disability<sup>2</sup> that restricts their diet when supported by a written statement from a state-licensed health care professional, who is authorized to write medical prescriptions. Substitutions will be provided only when a medical statement from the licensed health care professional is on file at the school. The medical statement must state the nature of the child’s impairment so its effect on the student’s diet is understood, and what must be done to accommodate the impairment. The district will not charge more than the price of the school meal, as determined by the child’s eligibility status, for meals with the accommodation.
5. The district will control the sale of competitive foods.
6. The district will ensure that potable ~~[drinking]~~ water will be available to students, free of charge for consumption in the place where meals are served during meal service.

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<sup>2</sup> To comply with Section 504 as it relates to a student’s severe food allergy, such as milk, gluten, nut or soy, and including but not limited to diabetes, colitis, etc.

7. The district will notify all households and appropriate staff of its meal charge requirements<sup>3</sup> at the beginning of each school year, upon enrollment of a student or the transfer of a student. The meal charging requirements will be posted on the district website, published in the student/parent handbook and made available in the information on free and reduced-priced meals.

~~[<sup>4</sup>Regardless of the ability to pay, a student shall be provided a reimbursable meal upon request. Parents or guardians may provide written permission to the district to withhold a meal from a student. After five meal charges the district will attempt to certify the student for free or reduced-price meals. At least two attempts to contact the student's parent or guardian for completing a meal application will be made by the district, including offering assistance filling out the application, if appropriate. Communications regarding student charges will be directed to parents or guardians, only.] [The district may refer delinquent meal charges to third parties for collection. Collection fees will not be charged to the parent or guardian.]~~

8. The sale of foods in competition with the district's lunch (NSLP) or breakfast (SBP) programs will be allowed in dining sites during lunch and breakfast periods with Board approval only when all income from the food sales accrues to the benefit of the district's nutrition and food services or accrues to a school or student organization approved by the Board. A copy of the Board minutes approving and defining competitive food sales will be made available upon request.
9. Students ~~will~~ ~~will not~~ be charged for second servings of meals or portions of meals served.

## Record Keeping

The following documents~~document~~ will be maintained by the district for three years after the current school year or longer, in the event of an unresolved audit(s), until the audit(s)~~audits~~ has been completed:

1. All currently approved and denied confidential applications for free and reduced-price meals~~, free milk,~~ all current direct certification documents, eligibility verification documents and school membership or enrollment lists;
2. Financial records that account for all revenues and expenditures of the district's nonprofit nutrition and food services programs, including procurement documents;
3. Records (i.e., recipes, ingredient lists and nutrition fact labels or product specifications) that document the compliance with nutrition standards for all program and competitive foods available for sale to students at a school campus;
4. Documents of participation data (i.e., meal counts) from each school in the district to support claims for reimbursement;
5. Production and menu records;

<sup>3</sup> Federal law requires the district to publish meal charging requirements. The district's charging requirements must identify how and when the information about account balances is communicated to staff, students and parents, and what collection methods will be used on delinquent balances.

<sup>4</sup> Pursuant to ORS 327.535 the following language reflects required practice, but the language is not required to be in policy.

6. Records to document compliance with Paid Lunch Equity;
7. Records to document compliance with Revenue from Nonprogram Foods; and
8. Internal program monitoring documents for NSLP[,][and][,] SBP[,][afterschool snacks][,] CACFP[,]  
~~and~~ and SFSP].-



# Jefferson School District 14J

Code: EFAA-AR(2)  
Revised/Reviewed: 5/11/15  
Orig. Code: EFAA-AR(2)

## Concessions - Foods Served

In order to comply with Marion County Health Department regulations, the following guidance must be followed in the planning and presentation of activities involving the serving of food stuff.

Events during which foods are served fall into two categories:

1. Private – An event that is limited to the members (i.e., students and/or employees of the district) and member guests (i.e., friends/family invited by students/employees) is not subject to the temporary restaurant rules.

Example: If the band is having a dinner with just students, their parents, and people the parents and students invite, this is a private event, even though it may be advertised in the school newsletter. As a private event, no license is needed.

2. Public – An event to which the general public has been invited. Inviting the public includes advertising in a newspaper, on TV, on a reader board, and on the district website or Facebook page.

Example: If a fund-raising dinner is advertised in the Statesman Journal inviting public participation, this is a public event requiring a license.

If needed, Marion County Environmental Health (Phone 503-588-5346) can assist with identifying your event.

Foods served for Public consumption fall into three categories:

1. Foods prepared and served in a school kitchen by school kitchen staff are exempt from additional licensing requirements.
2. Prepackaged foods are exempt from additional licensing requirements.
3. Foods, other than defined above, fall under one of two license types:
  - a. Temporary Restaurant License

The temporary restaurant license provides two options:

- (1) The one-day license, a benevolent temporary restaurant license; or
- (2) The 90-day license, a seasonal temporary license. Fees can vary based on the length of the license and who is operating the temporary restaurant (concessions).

b. Full Service License

This license, basically the same license needed for restaurants, and a kitchen that meets the same construction requirements as a restaurant.

License applications must be submitted at least five days prior to the event, or a late fee may be applied. Applications are available in the school offices and online. (Oregon Food Handler Card also required.)

Here is a link to the Temporary Restaurant Operation Guide – Guidelines for Food Booths at Events:

<http://www.co.marion.or.us/NR/rdonlyres/66323A6E-735B-4F10-A2C3-5423B77A9467/44150/tempguide.pdf>

# OSBA Model Sample Policy

Code: GCQAB  
Adopted:

## Private Tutoring for Pay

No private tutoring for which a teacher receives a fee will be allowed in a school building on school time.  
[District facilities, materials or equipment may not be used.] [~~District facilities, materials or equipment may be used under the same conditions as this property is made available to the general public.~~]

END OF POLICY

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### Legal Reference(s):

[ORS 244.010](#)

[ORS 332.505](#)

# OSBA Model Sample Policy

Code: IGDD  
Adopted:

## Student Performances

Instructors are encouraged to arrange for individual students and groups to provide public performances when they contribute to educational process objectives and when they do not interfere with other scheduled activities or classes within the school, as follows:

1. All performances involving students will be approved by the principal;
2. The extended use of one particular group will be discouraged;
3. Students participating in a performance will conduct themselves in accordance with the student conduct code adopted by the district;
4. Performances that are scheduled outside school hours are preferred. Performances during school hours should be limited to the class period during which the activity is usually taught to that particular student or students.

Student groups may participate in district activities and with groups in the community upon the approval of the principal. Proceeds given students for participating or performing will be placed in student accounts.

END OF POLICY

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### Legal Reference(s):

[ORS 332.072](#) [OAR 581-021-0050](#)  
[ORS 332.107](#) [OAR 581-021-0055](#)

Bethel Sch. Dist. v. Fraser, 478 U.S. 675 (1986).

# Jefferson School District 14J

Code: JFCJ  
Adopted: 8/13/12  
Revised/Readopted: 12/14/20  
Orig. Code: JFCJ

## Weapons in the Schools\*\*

Students shall not bring, possess, conceal or use a weapon on or at ~~any district~~ property under the jurisdiction of the district, ~~any~~ activities under the jurisdiction of the district or ~~any~~ interscholastic activities administered by a voluntary organization.

In accordance with the federal Gun-Free School Zone Act, possession or discharge of a firearm in a school zone is prohibited. A “school zone,” as defined by federal law, means in or on school grounds or within 1,000 feet of school grounds.

The superintendent may authorize persons to possess weapons for courses, programs and activities approved by the district and conducted on district property including, but not limited to, hunter safety courses, weapons-related vocational courses or weapons-related sports. The district will post a notice at any site or premise off district grounds that at the time is being used exclusively for a school program or activity. The notice shall identify the district as the sponsor, the activity as a school function and that the possession of firearms or dangerous weapons in or on the site or premises is prohibited under Oregon Revised Statute (ORS) 166.370.

For purposes of this policy, and as defined by state and federal law, “weapon” includes:

1. A “dangerous weapon” means any weapon, device, instrument, material or substance, which under the circumstances in which it is used, attempted to be used or threatened to be used is readily capable of causing death or serious physical injury;
2. A “deadly weapon” means any instrument, article or substance specifically designed for and presently capable of causing death or serious physical injury;
3. A “firearm” means any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of an explosive, frame or receiver of any such weapon, any firearm ~~muffler or~~ silencer or any destructive device;
4. A “destructive device” ~~includes but is not limited to~~ ~~means~~ any ~~device with an~~ explosive, incendiary or poison gas component or any combination of parts either designed or intended for use in converting any device into any destructive device or from which a destructive device may be readily assembled. A destructive device does not include any device which is designed primarily or redesigned primarily for use as a signaling, pyrotechnic, line-throwing, safety or similar device.

~~Weapons~~ may also include, but ~~are not be~~ limited to, knives, metal knuckles, straight razors, noxious or irritating gases, poisons, unlawful drugs or other items fashioned with the intent to use, sell, harm, threaten or harass students, staff members, parents and ~~community members~~ ~~patrons~~.

~~Replicas of weapons~~, fireworks ~~and~~ pocket knives ~~are~~ also prohibited by Board policy. Exceptions to the district’s replicas prohibition may be granted only with prior principal approval for certain curriculum or school-related activities.

Prohibited weapons, replicas of weapons, fireworks and pocket knives are subject to seizure or forfeiture.

In accordance with Oregon law, any district employee who has reasonable cause to believe a student or other person, while in a school, is or ~~has~~, within the previous 120 days ~~has~~, ~~unlawfully~~ been in possession of a firearm or destructive device, as defined by this policy, shall immediately report such violation to an administrator or designee or law enforcement. ~~[Any district employee who has reasonable cause to believe that a person, while in a school, is or has been in possession of a firearm or destructive device more than 120 days previously, may report to law enforcement.]~~ Employees who report directly to law enforcement shall also immediately inform an administrator.

Administrators shall promptly notify the appropriate law enforcement agency of staff reports received and at any other time there is reasonable cause to believe violations for firearms or destructive devices have occurred or that a student has been expelled for bringing, possessing, concealing or using a dangerous or deadly weapon, firearm or destructive device. ~~Parents will be notified of all conduct by their student that violates this policy.~~

A person making a report as described above who has reasonable grounds for making the report is immune from liability, civil or criminal, that might otherwise be incurred or imposed with respect to the making or content of the report. The identity of a person participating in a good faith report as described above may not be disclosed except when allowed by law.

Parents will be notified of all conduct by their student that violates this policy.

Employees shall promptly report all other conduct prohibited by this policy to an administrator.

Students ~~determined found to have violated the district's zero-tolerance weapons policy shall be expelled for a period of not less than one year.~~ Students found to have brought, possessed, concealed or used a ~~dangerous or deadly weapon,~~ firearm, as defined in policy, ~~or destructive device~~ in violation of this policy or state law shall be expelled from school for a period of not less than one year. All other violations of the policy will result in discipline ~~up to~~ and may include ~~including~~ expulsion and/or referral to law enforcement, as appropriate. The superintendent may, on a case-by-case basis, modify this expulsion requirement. The superintendent may propose alternative programs of instruction or instruction combined with counseling that are appropriate and accessible to the student, and shall provide such information in writing to the student and the parent in accordance with law<sup>1</sup>. Appropriate disciplinary and/or legal action will be taken against students or others who assist in activity prohibited by this policy.

Special education students shall be disciplined in accordance with federal law and Board policy JGDA -- Discipline of Students with Disabilities, and accompanying administrative regulation.

~~Weapons under the control of law enforcement personnel or a person who has a valid license under ORS 166.291 and 166.292 are permitted. The superintendent may authorize other persons to possess weapons for courses, programs and activities approved by the district and conducted on district property including, but not limited to, hunter safety courses, weapons-related vocational courses or weapons-related sports.~~

~~The district may post a notice at any site or premise off district grounds, that at the time is being used exclusively for a school program or activity. The notice shall identify the district as the sponsor, the activity as a school function and that the possession of firearms or dangerous weapons in or on the site or premises is prohibited under ORS 166.370.~~

~~In accordance with the federal Gun-Free School Zone Act, possession or discharge of a firearm in a school zone is prohibited. A "school zone," as defined by federal law, means in or on school grounds or within 1,000 feet of school grounds.~~

"Gun-Free School Zone" signs ~~[will]~~ ~~[may]~~ be posted in cooperation with city and/or county officials as appropriate. Violations, unless otherwise excepted by law or this policy, shall be reported to the appropriate law enforcement agency.

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<sup>1</sup> At least once every six months or at any time the information changes because of the availability of new programs.

The superintendent will annually report the name of each school and the number of students from each listed schools expelled for bringing, possessing, concealing or using a firearm to the Oregon Department of Education.

END OF POLICY

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**Legal Reference(s):**

[ORS 161.015](#)  
[ORS 166.210](#) - ~~to~~ 166.370  
[ORS 166.382](#)  
[ORS 332.107](#)  
[ORS 339.115](#)  
[ORS 339.240](#)  
[ORS 339.250](#)  
[ORS 339.315](#)  
[ORS 339.327](#)  
[ORS 809.135](#)  
[ORS 809.260](#)  
  
[OAR 581-021-021-0050](#) - ~~to~~ 0075  
[OAR 581-053-053-0010\(5\)](#)  
[OAR 581-053-053-0230\(9\)\(k\)](#)  
[OAR 581-053-053-0330\(1\)\(r\)](#)  
[OAR 581-053-053-0430\(17\)](#)  
[OAR 581-053-053-0531\(16\)](#)  
[OAR 581-053-0630](#)

Gun-Free School Zones Act ~~of 1990~~, 18 U.S.C. §§ 921(a)(25)-(26), 922(q) (2018~~2012~~).  
Individuals with Disabilities Education Act (IDEA), 20 U.S.C. §§ 1400-1419 (2018~~2012~~).  
Youth Handgun Safety Act, 18 U.S.C. §§ 922(x), 924(a)(6) (2018~~2012~~).  
Safe and Drug-Free Schools and Communities Act, 20 U.S.C. §§ 7101, 7111-7121 (2018~~2012~~).

**Cross Reference(s):**

JFCM - Threats of Violence  
JGDA - Discipline of Students with Disabilities

# Jefferson School District 14J

Code: KL  
Adopted: 6/08/20  
Revised/Readopted: 4/08/24  
Orig. Code(s): KL

## Public Complaints\*\*

Board members recognize that complaints about schools may be voiced by ~~employees,~~ ~~students,~~ parents of students who attend a school in the district, and persons who reside in the district. When such complaints are made to a Board member, the Board member shall refer the person making the complaint to the superintendent or designee. A Board member shall not attempt to respond, review, handle or resolve such complaints as the individual board member has no authority to do so.

A complaint of retaliation against a student who in good faith reported information that the student believes is evidence of a violation of state or federal law, rule or regulation, should be made to the superintendent.

A person may initiate a complaint by discussing the matter with the ~~administrator~~ ~~principal~~. That ~~administrator~~ ~~principal~~ shall attempt to resolve the complaint within 10 working days of initiation of the complaint with the ~~administrator~~ ~~principal~~. If the complainant is dissatisfied, the complainant may file a written complaint with the superintendent within 10 working days of the decision from the ~~administrator~~ ~~principal~~. The superintendent will attempt to resolve the complaint. If the complaint remains unresolved after 10 working days of receipt of the complaint by the superintendent, the complainant may appeal to the Board. A written complaint referred to the Board may be considered at the next regularly scheduled or special Board meeting. A final written decision regarding the complaint shall be made by the Board within 20 days from receipt of the complaint. The written decision of the Board will be final and will address each allegation in the complaint and reasons for the district's decision. If the Board chooses not to hear the complaint, the superintendent's decision is final. The Board may hold the hearing in executive session if the subject matter qualifies under Oregon law.

The timelines may be extended upon written agreement between the district the complainant.<sup>{1}</sup>

The district may offer mediation or another alternative dispute resolution process as an option if all parties to the complaint agree in writing to participate in such mediation or resolution.

Complaints against the principal should be filed with the superintendent. The superintendent will attempt to resolve the complaint. If the complaint remains unresolved within 10 working days of receipt by the superintendent, the complainant may request to place the complaint on the Board agenda at the next regularly scheduled or special Board meeting. The Board may use executive session if the subject matter qualifies under Oregon law. The Board shall decide in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within 30 days of receipt of the request to place the complaint on a Board meeting agenda. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against the superintendent should be referred to the Board chair on behalf of the Board. The Board chair shall present the complaint to the Board in a Board meeting. If the Board decides an

<sup>1</sup> {For district information. The district's timeline established by each step of the district's complaint procedure for alleging a violation found in OAR 581-002-0003 must be within 30 days of the submission of the complaint at any step, unless the district and complainant have agreed in writing to a longer time period for that step. However, the district's complaint procedure should not exceed a total of 90 days from the initial filing of the complaint, regardless of the number of steps involved, unless the district and the complainant have agreed in writing to a longer time period. (OAR 581-002-0005)}



investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board may use executive session if the subject matter qualifies under Oregon law. The Board shall decide in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within ~~30~~ days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against the Board as a whole or against an individual Board member should be referred to the Board chair on behalf of the Board. The Board chair shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board shall decide in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within ~~30~~ days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against the Board chair should be made directly to ~~district counsel~~ the Board vice chair on behalf of the Board. The ~~district counsel~~ Board vice chair shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board shall decide in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within ~~30~~ days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

A complainant must file a complaint within the later of either time limit set below, in accordance with State law:

1. Within two years after the alleged violation or unlawful incident occurred or the complainant discovered the alleged violation or unlawful incident. For incidents that are continuing in nature, the time limitation must run from the date of the most recent incident; or
2. Within one year after the affected student has graduated from, moved away from or otherwise left the district.

The district's final decision for a complaint processed under this Board policy that alleges a violation of Oregon Administrative Rule (OAR) Chapter 581, Division 22 (Division 22 Standards), ORS 339.285 - 339.303 or OAR 581-021-0550 - 581-021-0570 (Restraint and Seclusion), or ORS 659.852 (Retaliation), will be issued in writing or electronic form. The final decision will address each allegation in the complaint and contain reasons for the district's decision. If the complainant is a ~~student~~, parent or guardian of a student attending school in the district or a person that resides in the district, and the complaint is not resolved through the complaint process above, the complainant may file an appeal<sup>2</sup> to the Deputy Superintendent of Public Instruction under OAR 581-002-0001 – 581-002-0023 ~~(See KL-AR(2) - Appeal to the Deputy Superintendent of Public Instruction)~~.

### **Charter Schools of which the District Board is a Sponsor**

~~The district Board, through its charter agreement with [name of public charter school sponsored by the district board] through a board resolution through this policy, will review an appeal of a decision reached by the Board of [name of public charter school] on a complaint alleging a violation of ORS 339.285 – 339.303 or OAR 581-021-0550 – 581-021-0570 (Restraint or Seclusion), ORS 659.852 (Retaliation), or applicable OAR Chapter 581, Division 22 (Division 22 Standards). A complainant may appeal and will submit such appeal to the [superintendent] Board chair on behalf of the district Board~~

<sup>2</sup> An appeal must meet the criteria found in OAR 581-002-0005(1)(a).

within [30] days of receipt of the decision from the public charter school board. A final decision reached by the district Board may be appealed to the Oregon Department of Education under OAR 581-002-0001–581-002-0023.]

OR

[The district Board, [through its charter agreement with [name of public charter school sponsored by the district board]] [through a board resolution] [through this policy], will not review an appeal of a decision reached by the Board of the [name of public charter school] on a complaint alleging a violation of ORS 339.285–339.303 or OAR 581-021-0550–581-021-0570 (Restraint or Seclusion), ORS 659.852 (Retaliation), or applicable OAR Chapter 581, Division 22 (Division 22 Standards), for which the district Board has jurisdiction, and recognizes a decision reached by the Board of [name of public charter school] as the district Board’s final decision. A final decision reached by this district Board may be appealed to the Oregon Department of Education under OAR 581-002-0001–581-002-0023.]

### **[{<sup>3</sup>}Review Process for a Public School Board Complaint Decision**

The appeal of a complaint from a public charter school to be reviewed by the district Board will be presented by the Board chair and reviewed by the Board at a Board meeting. The Board may use executive session if the subject matter qualifies under Oregon law. The Board will review the appeal and make a decision about appropriate action, which may include, but is not limited to, holding a hearing, requesting information, and recognizing the decision reached by the public charter school board. A decision will be reached, within [20] days, in open session, unless allowed in executive session. A final written decision regarding the appeal shall be issued by the district Board within [10] days. The written decision of the district Board will address each allegation in the complaint and include reasons for the district Board’s decision.]

END OF POLICY

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#### **Legal Reference(s):**

[ORS 192.660](#)  
[ORS 332.107](#)

[ORS 659.852](#)  
[OAR 581-002-0001 - 002-0005](#)

[OAR 581-022-2370](#)

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

#### **Cross Reference(s):**

AC - Nondiscrimination  
IIA - Selection and Use of Instructional Materials

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<sup>3</sup> {If the district Board elects to hear appeals on public charter school complaints for which the district Board has jurisdiction, as decided by statements in the charter agreement, Board policy, or a board resolution, this language is recommended for this policy to delineate the process.}

# Jefferson School District 14J

Code: KL-AR(1)  
Revised/Reviewed: 1/14/19; 6/08/20; 4/08/24  
Orig. Code: KL-AR

## Public Complaint Procedure

A parent or guardian of a student attending a school in the district, ~~or~~ a person who resides in the district, a staff member, or a student who wishes to express a concern should discuss the matter with the school employee involved.

### <sup>{1}</sup> The ~~Administrator~~/Supervisor: Step One

If the individual is unable to resolve a problem or concern with the employee, the individual may file a written, signed complaint with the ~~administrator~~/supervisor within ~~five~~ 10 working days of the employee's response. The ~~administrator~~/supervisor shall evaluate the complaint and render a decision within ~~five~~ 10 working days after receiving the complaint. (A form is available, but is not required.)

### The Superintendent: Step Two

If Step One does not resolve the complaint, within ~~10~~ working days of the written response from the ~~administrator~~/supervisor, the complainant may file a written, signed complaint with the superintendent or designee clearly stating the nature of the complaint and a suggested remedy.

The superintendent or designee shall investigate the complaint, confer with the complainant and the parties involved, prepare a report of their findings and conclusion, and provide the report <sup>2</sup> in writing or in an electronic form to the complainant within ~~10~~ working days after receiving the written complaint.

### The Board: Step Three

If the complainant is dissatisfied with the superintendent's or designee's findings and conclusion, the complainant may appeal the decision to the Board within ~~five~~ 10 working days of receiving the superintendent's decision. The Board will review the findings and conclusion of the superintendent in a public meeting to determine what action is appropriate. The Board may use executive session if the subject matter qualifies under Oregon law. Appropriate action may include, but is not limited to, holding a hearing, requesting additional information, and adopting the superintendent's decision as the district's final decision. All parties involved, including the school administration, may be asked to attend such hearing for the purposes of making further explanations and clarifying the issues.

If the Board chooses not to hear the complaint, the superintendent's decision in Step Two is final<sup>3</sup>.

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<sup>1</sup> {For district information. The district's timeline established by each step of the district's complaint procedure for alleging a violation found in OAR 581-002-0003 must be within 30 days of the submission of the complaint at any step, unless the district and complainant have agreed in writing to a longer time period for that step. However, the district's complaint procedure should not exceed a total of 90 days from the initial filing of the complaint, regardless of the number of steps involved, unless the district and the complainant have agreed in writing to a longer time period. (OAR 581-002-0005)}

<sup>2</sup> If the Board chooses to accept the superintendent's decision as the district's final decision on the complaint, the superintendent's written decision must meet the requirements of OAR 581-022-2370(4)(b).

<sup>3</sup> If the Board choose to accept the superintendent's decision as the district's final decision on the complaint, the superintendent's written decision must meet the requirements of OAR 581-022-2370(4)(b).

The complainant shall be informed in writing or in electronic form of the Board's decision within ~~{4}~~ 30 days from the ~~hearing~~ receipt of the appeal by the Board. The Board's decision will address each allegation in the complaint and contain reasons for the district's decision. The Board's decision will be final.

The timelines may be extended upon written agreement between the district and the complainant. The district's final decision for a complaint processed under this administrative regulation that alleges a violation of Oregon Administrative rule (OAR) Chapter 581, Division 22 (Division 22 Standards), ORS 339.285 - 339.303 or OAR 581-021-0550 - 581-021-0570 (Restraint and Seclusion), or ORS 659.852 (Retaliation), will be issued in writing or electronic form. The final decision will address each allegation in the complaint and contain reasons for the district's decision. If the complainant, who is a ~~student~~, parent or guardian of a student attending school in the district or a person that resides in the district, and this complaint is not resolved through the complaint process, the complainant may appeal<sup>5</sup> the district's final decision to the Deputy Superintendent of Public Instruction under Oregon OARs 581-002-0001 – 581-002-0023.

Complaints against the principal should be filed with the superintendent. The superintendent will attempt to resolve the complaint. If the complaint remains unresolved within ~~10~~ working days of receipt by the superintendent, the complainant may request to place the complaint on the Board agenda~~at the next~~ regularly scheduled or special Board meeting~~at the next~~. The Board may use executive session if the subject matter qualifies under Oregon law. The Board shall decide in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within ~~30~~ days of receipt of the request to place the complaint on the Board agenda. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against the superintendent should be referred to the Board chair on behalf of the Board. The Board chair shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board shall decide in open session what action, if any, is warranted. The Board may use executive session if the subject matter qualifies under Oregon law. A final written decision regarding the complaint shall be issued by the Board within ~~30~~ days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against the Board as a whole or against an individual Board member should be referred to the Board chair on behalf of the Board. The Board chair shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board shall decide, in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within ~~30~~ days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against the Board chair may be referred directly to the ~~district counsel~~ ~~Board vice chair~~ on behalf of the Board. The ~~district counsel~~ ~~Board vice chair~~ shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board shall decide, in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within ~~30~~ days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

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<sup>4</sup> {In a complaint process with more than one step, a written decision should be issued within 30 days of the submission of the complaint at any step, unless the district and complainant have agreed in writing to a longer time period for that step.}

<sup>5</sup> An appeal must meet the criteria found in OAR 581-002-0005(1)(a).

## **{{<sup>6</sup>}}Charter Schools of which the**

### **Jefferson School District Board is a Sponsor**

The appeal of a complaint from a public charter school to be reviewed by the district Board will be presented by the Board chair and reviewed by the Board at a Board meeting. The Board may use executive session if the subject matter qualifies under Oregon law. The Board will review the appeal and make a decision about appropriate action, which may include, but is not limited to, holding a hearing, requesting information, and recognizing the decision reached by the public charter school board. A decision will be reached, in open session, unless allowed in executive session. A final written decision regarding the appeal shall be issued by the district Board within [30] days of receipt of the complaint. The written decision of the district Board will address each allegation in the complaint and include reasons for the district Board's decision.]

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<sup>6</sup> {If the district Board elects to hear appeals on public charter school complaints for which the district Board has jurisdiction, as decided by statements in the charter agreement, Board policy, or a board resolution, this language is recommended for this administrative regulation to delineate the process.}

**{Jefferson School District}**

**COMPLAINT FORM**

To: ☐ Employee\* ☐ Administrator/Supervisor\* ☐ Superintendent ☐ Board chair ☐ Board vice chair

\* Form available but is not required.

Person Making Complaint \_\_\_\_\_

Phone Number \_\_\_\_\_ Email \_\_\_\_\_

Nature of Complaint \_\_\_\_\_

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Who should we talk to and what evidence should we consider? \_\_\_\_\_

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Suggested solution/resolution/outcome: \_\_\_\_\_

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Signature of Complainant: \_\_\_\_\_ Date: \_\_\_\_\_

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**Office Use**

Disposition of Complaint: \_\_\_\_\_

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

cc: District Office

# Jefferson School District 14J

Code: KL-AR(2)  
Revised/Reviewed: 6/08/20  
Orig. Code(s): KL-AR(2)

## Appeal to the Deputy Superintendent of Public Instruction

An appeal process has been established by the Oregon Department of Education (ODE) by Oregon Administrative Rules (OAR) 581-002-0001 – 581-002-0023<sup>1</sup> for complaints that allege violation of OAR Chapter 581, Division 22 (Division 22 Standards), Oregon Revised Statute (ORS) 339.285 – 339.303 or OAR 581-021-0550 – 581-021-0570 (Restraint and Seclusion), or ORS 659.852 (Retaliation).

The complainant may appeal the district's final decision for a complaint to the Deputy Superintendent of Public Instruction if:

1. The complainant has exhausted the district's complaint procedures except as otherwise allowed by statute;
2. The district failed to render a written decision within 30 days of the submission of the complaint at any step unless the district and complainant have agreed in writing to a longer time period for that step; or
3. The district failed to resolve the complaint within 90 days of the initial filing of the complaint, regardless of the number of steps in the district complaint process, unless the district and the complainant have agreed in writing to a longer time period.

The appeal may include a complaint alleging a violation of ORS 659.852 if the complainant alleges that retaliation occurred in response to a complaint for which the complainant received the district's final decision for a complaint.

The appeal must be received by ODE no later than:

1. One year after the date of the final decision by the district; or
2. If the district fails to resolve the complaint, no later than two years after the date on which the complainant first filed the complaint with the district.

The complaint upon which the appeal is based must have been initially filed with the district by the later of the following two dates:

1. The date occurring two years after the date on which the alleged violation or unlawful incident occurred or on which the complainant discovered the alleged violation or unlawful incident<sup>2</sup>; or

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<sup>1</sup> The following is not a representation of the complete rules. See complete rules available on the Oregon Administrative Rules.

<sup>2</sup> If the alleged violation or unlawful incident is of a continuing nature, the date on which the alleged violation or unlawful incident occurred is the most recent date on which the alleged violation or unlawful incident occurred.

2. The date occurring one year after the date on which the affected student graduated from, moved away from or otherwise left the district.

The appeal shall:

1. Be in writing;
2. Be submitted in person, by mail, or electronically.

The appeal must contain:

1. The name of the person filing the appeal;
2. The phone number, address, or email address, if available, of the person filing the appeal;
3. The name of the student if the person filing the appeal is filing on behalf of the student;
4. A statement of the facts on which the appeal is based; and
5. Other information requested by ODE.

Upon receipt of an appeal, ODE will determine whether the appeal satisfies the requirements of OAR 581-002-0003 and OAR 581-002-0005.

After these determinations, ODE will give written notice to the complainant and the district whether the appeal has been accepted.

If ODE has accepted an appeal and gave notice to the complainant and the district involved, the district shall submit a written response and all correspondence, documents, and other information ODE requested within 30 days of receipt of the notice.

The district's written response shall include:

1. A statement of facts;
2. A description of district action taken in response to the complaint; or if none was taken, an explanation of the reason(s) why no action was taken;
3. Any stipulation reached concerning settlement of the complaint; and
4. A list of any complaints filed with another agency by the complainant concerning the subject of the appeal to the extent that the district is aware of such complaints.

The Director of ODE may for good cause extend the time by which a district must make a submission described above.

Upon receipt of the district's written response, ODE will conduct an investigation to determine whether the district violated a rule or law described in OAR 581-002-0003.

ODE shall issue a final order pursuant to OAR 581-002-0017.





# Willamette

EDUCATION SERVICE DISTRICT

## 2025-27 Local Service Plan Resolution 2024-2025 (25.01.001)

Approved by Executive Council on 11.21.2024

Approved by Willamette ESD Board on 12.10.2024

BE IT RESOLVED THAT, pursuant to the provisions of ORS 334.175, the Board of Directors of the Jefferson School District approves the following 2025-27 Local Service Plan Resolution:

### WESD PROVIDED SERVICES: WESD Uses Non-LSP Funds, No Cost to Districts

- Attendance Services (Districts less than 1000 students)
- Homeschool Registration
- Regional Leadership Meetings
- Crisis Response Team
- Youth Suicide Prevention Services

### PROGRAMS FOR CHILDREN WITH SPECIAL NEEDS:

- Audiology Services
- Autism Services
- Behavior Intervention Program
- Behavior Services / School Psych
- Braille Transcription Services
- EI/ECSE Evaluations
- Nursing Services
- Occupational & Physical Therapy Services
- Professional Development/Trainings
- Speech/Language/Augmentative Communication
- Transition Specialist Services
- Vision Education Assistant
- SPED Administration Services
- Licensed Clinical Social Worker
- Preschool Administration & Oversight
- Preschool Curriculum Coaching & Support

### TECHNOLOGY SUPPORTS:

- Cybersecurity Audits
- Desktop Support
- Network Services
- Software Supports
- Technology Training
- Student Information Services
- HR & Financial Systems
- Special Education Systems
- Oregon Data Suite/Early Indicator & Intervention Sys.

### SCHOOL IMPROVEMENT SERVICES:

- Family Support Advocate
- Library Media Specialist
- Mid-Willamette Education Consortium
- School Safety Supports
- Individualized School Improvement Services/Assessments
- Social Emotional Learning Services
- Student Internship Coordination
- Willamette Career Academy
- Willamette School Improvement Consortium
- Willamette Promise Services
- Newcomer & Recent Arriver Transcript Review

### ADMINISTRATIVE & SUPPORT SERVICES FOR DISTRICTS:

- Business Services
- Communications, Marketing & Bond Services
- Courier
- Criminal History Background Checks
- Data Analysis and/or Data Coaches
- Grant Writing Services
- Human Resources Services
- Legal Services
- Professional Support Services/PD Services
- Program & Project Evaluation Services
- Substitute & Employee Management
- Translation Services
- Medicaid Billing/MAC Claiming

### **SERVICES PROVIDED TO ENTITIES OTHER THAN COMPONENT DISTRICTS**

In an effort to remain transparent, Willamette ESD (WESD) discloses that the following services may be provided to public or private entities that are outside of the WESD region. In addition to any services listed on page one of this documents, other services may include:

#### **PROGRAMS FOR CHILDREN WITH SPECIAL NEEDS:**

- Special Education Services: Autism Spectrum Disorder Consultation and Resources and Classroom services for students who are Deaf and Hard of Hearing. Related Services including, but not limited to: Physical Therapy, Occupational Therapy, Speech Therapy, Autism Specialist, Behavior Intervention Program and Sign Language Instruction

#### **SCHOOL IMPROVEMENT SERVICES:**

- Willamette Promise and Willamette Career Academy

#### **TECHNOLOGY SUPPORT:**

- Student Information Services, HR & Financial Systems, Desktop Support, Network Services and Oregon Data Suite/Early Indicator & Intervention System

#### **ADMINISTRATIVE AND SUPPORT SERVICES FOR DISTRICTS:**

- Contracted Courier Services to Private Schools; Data Analysis; Program and Project Evaluation Services, Grant Writing Services, Legal Services, Regional Educator Network, Professional Support Services/PD Services and Business Services

**This certifies that the 2025-27 Local Service Plan is hereby adopted by the Jefferson School District Board of Directors on the 27<sup>th</sup> day of January, 2025.**

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Board Chair

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Superintendent

If these resolution services are approved by two-thirds of the school districts' Board of Directors with the majority of the students within WESD, WESD will budget for the services for the 2025-27 fiscal years, subject to the statutory limitation.

## EXAMPLE QUESTIONS ASKED BY BOARD MEMBERS OF A BUSINESS MANAGER DURING A FINANCIAL REVIEW SESSION

- 1) Are the books balanced and reconciled?
- 2) Are all cash and investment accounts reconciled to the general ledger?
- 3) Does the adopted budget reflect expected expenditures?
- 4) Have payroll reports been filed and have all payroll liabilities been paid timely?
- 5) Have all federal and state reimbursement requests as well as required financial reporting forms been filed timely?
- 6) Are there any suspected cases of fraud that we need to be aware of?
- 7) Are there any suspected changes to the internal control system?
- 8) Have there been any significant changes to the internal control system?
- 9) Is the business office adequately staffed to allow for proper segregation of duties?
- 10) Have there been any changes to the accounting system or accounting policies that are significant?
- 11) Has the accounting software and related IT systems been subject to review by an IT professional to ensure seamless backup in the event of a malware, ransomware, or other compromise of computer security?
- 12) Are there any other financial-related matters we should be aware of?
- 13) Are there any new pronouncements on the horizon that may require additional staff time or disbursement of funds to properly implement?
- 14) Are all financial statements that have been provided to the Board accurate and complete to the best of your knowledge?
- 15) Have you been asked by the Superintendent to do anything that makes you uncomfortable or to present any information you feel is inaccurate?

Jefferson School District 14J  
General Fund: Statement of Revenues Budget Vs. Actual  
For the Fiscal Year 2024-2025 As of 12/31/2024

Source	2024-25 Budget	Actual YTD Rev. 12/31/2024	Projected through 6/30/2025	Total Estimated 2024-25	(Over)/Under Budget	2023-24 Budget	Actual* YTD Rev. 6/30/2024
SSF Funding							
1111 Current Year Property Taxes- Marion	2,504,536	2,431,724	72,812	2,504,536	-	2,380,709	2,526,105
1111 Current Year Property Taxes- Linn	191,874	183,064	8,810	191,874	-	185,386	189,046
1112 Prior Year's Property Taxes- Marion	65,178	47,384	17,794	65,178	-	62,974	53,705
1112 Prior Year's Property Taxes- Linn	3,970	2,392	1,578	3,970	-	3,662	3,512
1114 Payment in Lieu of Property Taxes- Marion	7,523	493	7,030	7,523	-	7,269	1,698
1114 Payment in Lieu of Property Taxes- Linn	-	-	-	-	-	-	-
2101 County School Funds- Marion	23,000	-	23,000	23,000	-	23,000	5,484
2101 County School Funds- Linn	3,000	-	3,000	3,000	-	3,000	1,647
2199 Other Intermediate Sources	-	-	-	-	-	-	-
2800 Revenue in Lieu of Taxes	-	1,633	-	1,633	(1,633)	7,000	3,375
3101 State School Support Funds	7,650,525	4,433,456	3,217,069	7,650,525	-	7,767,969	7,535,145
3101 SSF May Payback	-	-	-	-	-	-	9,613
3103 Common School Fund- Marion	108,000	51,940	56,060	108,000	-	107,236	51,940
3104 State Timber- Marion	750	-	750	750	-	750	-
3104 State Timber- Linn	250	-	250	250	-	250	-
3150 Small HS Grant	50,000	-	50,000	50,000	-	50,000	39,898
4801 Federal Forest Fees- Marion	-	-	-	-	-	-	-
4801 Federal Forest Fees- Linn	-	-	-	-	-	-	-
Total SSF Funding	10,608,606	7,152,084	3,458,154	10,610,239	(1,633)	10,599,205	10,421,168
<b>Total SSF Revenue</b>	<b>\$ 10,608,606</b>	<b>\$ 7,152,084</b>	<b>\$ 3,458,154</b>	<b>\$ 10,610,239</b>	<b>\$ (1,633)</b>	<b>\$ 10,599,205</b>	<b>10,421,168</b>
<b>Non State School Support Formula Sources</b>							
<b>Local Sources</b>							
1510 Earnings on Investments	120,000	43,958	76,042	120,000	-	120,000	101,298
1512 Local Tax Interest	1,000	-	1,000	1,000	-	1,000	717
1910 Rentals	7,000	1,146	5,854	7,000	-	7,000	1,500
1920 Donations from Private Sources/SB1149	-	-	-	-	-	-	-
1941 Other LEA Services	-	-	-	-	-	-	-
1960 Recovery of Prior Year	-	-	-	-	-	-	-
1980 Indirect from Grants	-	-	-	-	-	-	-
1990 Miscellaneous Local Revenue	15,000	7,315	7,685	15,000	-	18,000	50,563
1991 Medicaid	-	-	-	-	-	-	-
Total Non Formula Local Sources	143,000	52,418	90,582	143,000	-	146,000	154,079
<b>Intermediate Sources</b>							
2900 WESD Transit Funds	-	-	-	-	-	-	-
<b>State/Federal Sources</b>							
3190 High Cost Disability	90,000	-	90,000	90,000	-	64,000	55,377
3199 Unrestricted State Revenue	-	-	-	-	-	-	-
Total State/Federal Sources	90,000	-	90,000	90,000	-	64,000	55,377
<b>Other Sources</b>							
5200 Interfund Transfers	-	-	-	-	-	-	-
5400 Beginning Fund Balance*	575,000	675,929	-	675,929	(100,929)	1,200,000	550,564
Total Other Sources	575,000	675,929	-	675,929	(100,929)	1,200,000	550,564
<b>Total Non SSF Revenue</b>	<b>\$ 808,000</b>	<b>\$ 728,347</b>	<b>180,582</b>	<b>\$ 908,929</b>	<b>\$ (100,929)</b>	<b>\$ 1,410,000</b>	<b>760,019</b>
<b>Total Resources</b>	<b>\$ 11,416,606</b>	<b>\$ 7,880,431</b>	<b>\$ 3,638,736</b>	<b>\$ 11,519,167</b>	<b>\$ (102,561)</b>	<b>\$ 12,009,205</b>	<b>\$ 11,181,187</b>
		Less Estimated Requirements		\$ (10,601,169)		Less Estimated Requirements	
		<b>Estimated Ending Fund Balance</b>		<b>\$ 917,998</b>		<b>Estimated Ending Fund Balance</b>	

**Jefferson School District 14J**  
**General Fund: Statement of Expenditure Budget Vs. Actual**  
**For the Fiscal Year 2024-2025**  
**As of 12/31/2024**

Function	2024-25 Budget	Actual YTD Exp. 12/31/2024	Projected through 6/30/2025	Total Estimated 2024-25	(Over)/ Under Budget	% Committed	2023-24 Budget	Actual YTD Exp. 6/30/2024
<b>Instruction</b>								
1111 Elementary, K-5 or K-6	1,658,088	462,190	1,022,102	1,484,292	173,796	89.52%	1,825,873	1,679,744
1113 Elementary/Extracurricular	5,532	1,766	3,624	5,390	142	97.43%	4,136	5,284
1121 Middle/Junior High Programs	1,003,159	316,118	704,649	1,020,767	(17,608)	101.76%	1,112,022	1,058,475
1122 Middle/Junior High School Extracurricular	53,041	25,099	31,796	56,896	(3,855)	107.27%	51,356	51,214
1131 High School Programs	1,561,040	492,572	1,013,578	1,506,150	54,890	96.48%	1,660,595	1,510,787
1132 High School Extracurricular	112,826	44,746	68,455	113,201	(375)	100.33%	110,642	113,121
1210 Programs for the Talented and Gifted	5,521	1,317	5,135	6,452	(931)	116.86%	6,961	4,138
1220 Restrictive Pgms for Students w/Disabilities	605,275	176,673	356,128	532,800	72,475	88.03%	598,700	443,868
1221 Learning Centers	-	-	-	-	-	0.00%	-	-
1227 Early School Year Program	-	11,408	100	11,508	(11,508)	0.00%	9,274	3,890
1229 Other Pgms for Students w/Disabilities	-	100	100	200	(200)	0.00%	-	-
1250 Programs for Students w/Severe Disabilities	713,703	243,452	451,890	695,342	18,361	97.43%	788,855	630,097
1281 Public Alternative Programs	4,000	-	-	-	4,000	0.00%	4,000	1,997
1283 District Alternative Programs	10,000	-	-	-	10,000	0.00%	63,344	-
1284 JCA	-	-	-	-	-	0.00%	-	-
1291 English Second Language Programs	260,958	86,352	168,586	254,939	6,019	97.69%	252,374	247,195
<b>Total Instruction</b>	<b>\$ 5,993,143</b>	<b>\$ 1,861,793</b>	<b>\$ 3,826,142</b>	<b>\$ 5,687,936</b>	<b>\$ 305,208</b>		<b>\$ 6,488,132</b>	<b>\$ 5,749,810</b>
<b>Support Services</b>								
2112 Attendance Services	-	-	-	-	-	0.00%	-	-
2115 Student Safety	3,500	1,146	5,080	6,226	(2,726)	177.89%	3,500	2,244
2122 Counseling Services	237,107	76,111	152,623	228,734	8,373	96.47%	241,411	148,278
2134 Nurse Services	141,062	56,425	84,637	141,062	-	100.00%	19,774	19,774
2140 Behavior Consultant	-	-	-	-	-	0.00%	-	-
2148 Psychological Services	115,666	-	104,500	104,500	-	90.35%	104,331	104,331
2152 Speech Pathology Services	-	-	-	-	-	0.00%	-	-
2160 Other Student Treatment Services	-	-	-	-	-	0.00%	-	-
2190 Service Directions, Student Support Svcs	116,382	62,960	63,012	125,972	(9,590)	108.24%	110,932	113,467
2213 Curriculum	-	687	-	687	(687)	0.00%	-	-
2219 Improvement of Instruction Services	-	-	-	-	-	0.00%	-	-
2222 Library/Media Center	34,466	5,803	9,040	14,843	19,623	43.06%	24,948	18,801
2223 Multimedia Services	-	-	-	-	-	0.00%	-	-
2230 Assessment and Testing	5,080	-	-	-	-	0.00%	-	-
2240 Staff Development	20,000	8,651	20,000	28,651	(8,651)	143.26%	36,515	5,241
2310 Board of Education	128,640	46,431	64,855	111,287	17,353	86.51%	129,935	103,172
2320 Executive Administration	201,131	112,063	101,667	213,730	(12,599)	106.26%	200,467	182,828
2410 Office of the Principal Services	998,984	356,971	538,819	895,790	103,194	89.67%	1,112,817	1,011,953
2510 Direction of Business Services	157,031	76,909	77,494	154,403	2,628	98.33%	153,155	146,366
2520 Fiscal Services	164,716	90,007	75,195	165,203	(487)	100.30%	160,420	159,744
2528 Other General Professional and Technological Servi	1,500	1,131	-	1,131	369	75.42%	1,500	2,068
2540 Operation & Maintenance of Plant Services	154,000	148,918	-	148,918	5,082	96.70%	135,000	139,134
2542 Care and Upkeep of Building Services	877,950	354,541	463,765	818,306	59,644	93.21%	840,550	806,029
2543 Care and Upkeep of Grounds Services	129,454	53,361	53,131	106,493	22,961	82.26%	132,520	116,334
2544 Maintenance	184,978	69,266	71,819	141,085	43,893	76.27%	161,450	155,363
2546 Security Services	10,000	1,434	4,566	6,000	4,000	60.00%	10,000	2,885
2550 Student Transportation Services	-	-	-	-	-	0.00%	-	-
2552 Vehicle Operation Services	705,500	286,824	476,461	763,285	(57,785)	108.19%	670,000	762,222
2558 Transportation/Special Educationb	105,000	19,918	62,082	82,000	23,000	78.10%	86,000	73,404
2573 Warehouse & Distribution Services	39,800	9,713	22,201	31,914	7,886	80.19%	41,200	25,819
2574 Printing, Publishing and Duplicating Services	45,000	14,798	27,702	42,500	2,500	94.44%	43,000	36,405
2643 Human Resources	68,987	40,173	30,874	71,047	(2,060)	102.99%	121,530	76,890
2649 Other Staff Services	-	-	-	-	-	0.00%	3,000	157
2662 Technology- Systems Analysis Services	246,682	115,117	76,791	191,908	54,774	77.80%	304,580	258,288
2663 Technology- Programming Services	74,247	60,957	-	60,957	13,290	82.10%	72,000	60,143
<b>Total Support Services</b>	<b>\$ 4,966,863</b>	<b>\$ 2,070,316</b>	<b>\$ 2,586,317</b>	<b>\$ 4,656,634</b>	<b>\$ 293,984</b>		<b>\$ 4,920,535</b>	<b>\$ 4,531,339</b>
<b>Other Requirements</b>								
5100 Debt Service	-	-	-	-	-	-	-	-
5200 Transfers of Funds	256,600	-	256,600	256,600	-	100.00%	300,538	3,448
6000 Contingency	50,000	-	-	-	50,000	0.00%	100,000	-
7000 Unappropriated Ending Fund Balance	150,000	-	-	-	150,000	0.00%	200,000	-
<b>Total Other Requirements</b>	<b>\$ 456,600</b>		<b>\$ 256,600</b>	<b>\$ 256,600</b>	<b>\$ 200,000</b>		<b>\$ 600,538</b>	<b>\$ 3,448</b>
<b>Total Requirements</b>	<b>\$ 11,416,606</b>	<b>\$ 3,932,110</b>	<b>\$ 6,669,059</b>	<b>\$ 10,601,169</b>	<b>\$ 799,191</b>		<b>\$ 12,009,205</b>	<b>\$ 10,284,596</b>

**Jefferson School District 14J**  
**Appropriations**  
**For the Fiscal Year 2024-2025**  
**As of 12/31/2024**

<b>General Fund (100)</b>	<b>Appropriations</b>	<b>Resolutions</b>		<b>YTD</b>	<b>Encumbrances</b>	<b>Totals</b>	<b>(Over)/Under Budget</b>
1000 Instruction	\$ 5,993,143	\$ -	\$	1,861,793	\$ 3,826,142	\$ 5,687,936	\$ 305,208
2000 Support Services	\$ 4,966,863	\$ -	\$	2,070,316	\$ 2,586,317	\$ 4,656,634	\$ 310,230
5100 Debt Service	\$ -	\$ -	\$	-	\$ -	\$ -	\$ -
5200 Transfers	\$ 256,600	\$ -	\$	-	\$ -	\$ -	\$ 256,600
6000 Contingency	\$ 50,000	\$ -	\$	-	\$ -	\$ -	\$ 50,000
Sub Total	\$ 11,266,606	\$ -		3,932,110	6,412,459	10,344,569	\$ 922,037
<b>Special Revenue Funds</b>							
1000 Instruction	\$ 1,696,928	\$ -	\$	616,739	\$ 759,876	\$ 1,376,615	\$ 320,313
2000 Support Services	\$ 456,438	\$ -	\$	122,224	\$ 140,258	\$ 262,482	\$ 193,956
3000 Community Service	\$ 597,938	\$ -	\$	235,332	\$ 265,912	\$ 501,245	\$ 96,693
Sub Total	\$ 2,751,304	-		974,296	1,166,046	2,140,342	\$ 610,962
<b>ASB Funds</b>							
1000 Instruction	\$ 297,950	\$ -	\$	44,289	\$ 12,458	\$ 56,746	\$ 241,204
5200 Transfers	\$ 12,500	\$ -	\$	-	\$ -	\$ -	\$ 12,500
Sub Total	\$ 310,450	\$ -	\$	44,289	\$ 12,458	\$ 56,746	\$ 253,704
<b>Debt Service</b>							
5100 Debt Service	\$ 1,857,944	\$ -	\$	332,518	\$ 1,525,752	\$ 1,858,270	\$ (326)
6000 Contingency	\$ 50,000	\$ -	\$	-	\$ -	\$ -	\$ 50,000
7000 Unappropriated	\$ 77,160	\$ -	\$	-	\$ -	\$ -	\$ 77,160
Sub Total	\$ 1,985,104			332,518	1,525,752	1,858,270	\$ 126,834
<b>Capital Fund</b>							
2000 Support Services	\$ 41,926	\$ -	\$	-	\$ -	\$ -	\$ 41,926
4000 Facilities Acquisitior	\$ 469,427	\$ -	\$	136,367	\$ 4,955	\$ 141,323	\$ 328,104
5000 Facilities Acquisitior	\$ -	\$ -	\$	-	\$ -	\$ -	\$ -
Sub Total	\$ 511,353	-		136,367	4,955	141,323	\$ 370,030
<b>Total Appropriations</b>	\$ 16,824,817	\$ -	\$	5,419,580	\$ 9,121,670	\$ 14,541,250	\$ 2,283,567
<b>Total Unappropriated</b>	\$ 150,000	-		-	-	-	\$ 150,000
<b>TOTAL</b>	<b>\$ 16,974,817</b>	<b>\$ -</b>	<b>\$</b>	<b>5,419,580</b>	<b>\$ 9,121,670</b>	<b>\$ 14,541,250</b>	<b>\$ 2,433,567</b>

# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

Criteria: From Check Date: 12/01/2024 To: 12/31/2024 Voucher: ALL  
Report Sort: FUND From Fund: 100 To: 999

☐ Page Break

☐ Exclude Invoice Description

Check Number	Vendor	Description	Amount
<b>100 - General Fund</b>			
48367	A&E Security	Basic Monitoring - District Wide	\$545.25
48355	Albany Lock & Key	Maintenance Supplies	\$50.00
48368	Albany Lock & Key	Maintenance Supplies	\$40.00
0	Amazon Capital Services, Inc	Office Supplies/Paper goods	\$284.94
0	Amazon Capital Services, Inc	Open PO for office supplies & supplies for meetings for the school year	\$5.20
0	Amazon Capital Services, Inc	Supplies/Paper/markers/tissues	\$47.49
0	Amazon Capital Services, Inc	space heater	\$59.99
0	Amazon Capital Services, Inc	Supplies for DO	\$39.07
0	Amazon Capital Services, Inc	Mid Paper Supplies/envelopes	\$25.34
0	Amazon Capital Services, Inc	Custodial Supplies	\$25.68
0	Amazon Capital Services, Inc	Custodial Supplies	\$40.66
0	Amazon Capital Services, Inc	School Board Appreciation Month	\$99.94
0	Amazon Capital Services, Inc	Supplies/Paper/markers/tissues	\$199.99
0	Amazon Capital Services, Inc	Supplies	\$7.85
0	Amazon Capital Services, Inc	MS SPED Supplies	\$44.77
0	Amazon Capital Services, Inc	Supplies/Gen Class - Purchase supplies for JES for the 24/25 school year	\$51.74
0	Amazon Capital Services, Inc	Office Supplies/Paper goods	\$87.15
0	Amazon Capital Services, Inc	Supplies/Paper/markers/tissues	\$24.89
0	Amazon Capital Services, Inc	Supplies for DO	\$52.48
0	Amazon Capital Services, Inc	Open PO for office supplies & supplies for meetings for the school year	\$348.44
0	Amazon Capital Services, Inc	Supplies/Paper/markers/tissues	\$232.95
0	Amazon Capital Services, Inc	Office Supplies/Paper goods	\$79.74
0	Amazon Capital Services, Inc	Custodial Supplies	\$186.50
0	Amazon Capital Services, Inc	Supplies/Science	\$39.90
0	Amazon Capital Services, Inc	Supplies/Science	\$23.96
0	Amazon Capital Services, Inc	Supplies/Science	\$31.98

# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

Criteria: From Check Date: 12/01/2024 To: 12/31/2024 Voucher: ALL  
Report Sort: FUND From Fund: 100 To: 999

☐ Page Break

☐ Exclude Invoice Description

Check Number	Vendor	Description	Amount
<b>100 - General Fund</b>			
0	Amazon Capital Services, Inc	High Paper Supplies/envelopes	\$27.70
0	Amazon Capital Services, Inc	Supplies/Physical Ed	\$458.45
48392	Benton Electric, Inc.	Other Contracted Services	\$690.28
0	Broadhurst, Sara L	Supplies/Counseling	\$28.97
0	Broadhurst, Sara L	Supplies/Counseling	\$59.98
0	Brons, Darcy K	Supplies/Special Ed	\$26.00
0	Cardmember Services	Charging Cables Chromebooks and projector board Room	\$159.99
0	Cardmember Services	Charging Cables Chromebooks and projector board Room	\$41.92
0	Cardmember Services	Computer Hardware	\$376.32
0	Cardmember Services	Computer Hardware	\$28.27
0	Cardmember Services	2 Specialty Chromebooks for Visually Impaired	\$448.00
0	Cardmember Services	Computer Hardware	\$15.98
0	Cardmember Services	Open PO for repairs and HDMI connectors	\$119.99
0	Cardmember Services	Custodial Supplies	\$275.98
0	Cardmember Services	SPED Supplies	\$84.95
0	Cardmember Services	Supplies/Drama Props, costumes, set pieces	\$118.03
48356	CitiBank	Lodging/travel expenses for OASBO	\$10.00
48356	CitiBank	Supplies for DO	\$184.00
48356	CitiBank	Meals for staff gatherings as needed throughout the school year	\$17.99
48356	CitiBank	Food/Meals for meetings	\$35.00
48356	CitiBank	OSBA Annual Convention Nov 7-9, 2024 Lodging, Meals, and Parking Dawn Moorefield	\$762.75
48356	CitiBank	OSBA Annual Conference Lodging, Parking, Meals - Jen Oertel	\$120.22
48356	CitiBank	OSBA Annual Conference Lodging, Parking, Meals - Jen Oertel	\$120.22
48356	CitiBank	Open PO for supplies	\$45.47
48369	City Of Jefferson	Water and Sewer Elementary School	\$608.42
48369	City Of Jefferson	Water and Sewer Middle School	\$1,962.08
48369	City Of Jefferson	Water and Sewer High School	\$1,962.07



# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

Criteria: From Check Date: 12/01/2024 To: 12/31/2024 Voucher: ALL  
Report Sort: FUND From Fund: 100 To: 999

☐ Page Break

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Check Number	Vendor	Description	Amount
<b>100 - General Fund</b>			
48370	COSA	COSA Winter Conference registration fee - Moorefield	\$350.00
48371	D & W Automotive	Supplies/Auto:Parts, tools, and supplies for Automotive Technology such as - nuts, bolts, paints, wiring, coolants, engine oil / filters, transmission oil, steering fluid, brake fluid, welding accessories and welding gas, along with specific repair and replacement parts on classroom projects	\$127.69
48357	Express Services, Inc	Temporary Custodial services	\$1,048.40
48372	Express Services, Inc	Temporary Custodial services	\$209.68
48393	Express Services, Inc	Temporary Custodial services	\$1,048.40
48418	Express Services, Inc	Temporary Custodian Services	\$1,048.40
0	First Student, Inc.	Home to School	\$66,085.73
0	First Student, Inc.	Reim Trans Gen Class High School	\$789.70
0	First Student, Inc.	Nonreim Tran MS Athletics	\$1,569.09
0	First Student, Inc.	Van Fuel Charge	(\$169.37)
48374	Flinn Scientific	Supplies/Science	\$60.99
48374	Flinn Scientific	Supplies/Science	\$13.73
48374	Flinn Scientific	Supplies/Science	\$85.98
48361	Freres Building Supply	Maintenance Supplies	\$5.45
48361	Freres Building Supply	Grounds Supplies	\$5.45
48361	Freres Building Supply	Supplies/Woods Wood shop supplies of lumber, glue, nails, screws, paint and stain for required projects.	\$35.90
48361	Freres Building Supply	Elem Custodial Supplies - Supplies that may need to be ordered throughout the 24/25 school year	\$19.99
48420	Garten Services Inc.	Confidential Shred Service	\$285.00
48394	Harvey & Price	Elem/Repairs & Maintenance Services	\$781.80
48394	Harvey & Price	MS/Repairs & Maintenance Services	\$956.80
48395	Hollmeyer HVAC Inc.	HS/Repairs & Maintenance Services	\$813.32
48396	Home Depot Credit Services	Maintenance Supplies	\$326.66
0	Jantzi, Scott Roy	Use as needed	\$100.00
48402	LRP Publications	Legal Services Sped	\$325.00

# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

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Check Number	Vendor	Description	Amount
<b>100 - General Fund</b>			
48402	LRP Publications	Legal Services Sped	\$425.00
48363	OASBO	OASBO Membership Dues	\$480.00
48379	Office Depot	Supplies/Gen Class - Purchase supplies for JES for the 24/25 school year	\$34.45
48403	Office Depot	Supplies/Gen Class - Purchase supplies for JES for the 24/25 school year	\$32.21
48423	Oregon School Personnel Assn	Winter Conference - Superintendent Moorefield	\$399.00
48381	OSBA	OSBA Annual Convention Nov 7-9, 2024 Registration Fee Jen Oertel	\$150.00
48381	OSBA	OSBA Annual Convention Nov 7-9, 2024 Registration Fee Jen Oertel	\$150.00
48381	OSBA	OSBA Annual Convention Nov 7-9, 2024 Pre-Conference & Conference Registration Dawn Moorefield	\$925.00
48382	OSU Horitculture	Grounds - Dues and Fees	\$390.00
48404	Pacific Power	DO Electricity	\$2,202.25
48404	Pacific Power	ES Electricity	\$7,072.10
48404	Pacific Power	MS Electricity	\$2,447.48
48404	Pacific Power	HS Electricity	\$12,148.44
48364	Pacific Sanitation	ES Garbage	\$369.95
48364	Pacific Sanitation	MS Garbage	\$575.00
48364	Pacific Sanitation	HS Garbage	\$546.38
48383	Salem Keizer Schools	pottery glaze and other supplies	\$210.60
48385	Sierra Springs	Water and Cooler Rental District Office Wide	\$48.96
48386	Steve Yutzie Floral Co	Condolence flowes for Grizzel/Linhart	\$143.00
48388	Truax Corporation	Dist Vehicles Pupil Trans	\$67.05
48388	Truax Corporation	Maint Vehicles Fuel	\$87.71
48388	Truax Corporation	Grounds - Fuel	\$16.45
48390	Willamette ESD	LSP- Parent Square	\$1,069.38
48390	Willamette ESD	nursing services	\$42,318.60
48427	Willamette ESD	Willamette School Improvement	\$2,959.68

# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

Criteria: From Check Date: 12/01/2024 To: 12/31/2024 Voucher: ALL  
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Check Number	Vendor	Description	Amount
Total for 100 - General Fund			\$162,657.41
<b>209 - Safe Schools Culture Grant</b>			
0	Brons, Darcy K	Mileage for MANDT training	\$93.80
0	Cardmember Services	MANDT Train the Trainer	\$3,098.00
Total for 209 - Safe Schools Culture Grant			\$3,191.80
<b>210 - Title 2A - Quality Teacher</b>			
48359	Francis, Deborah	MS/HS Math Initiative Work	\$900.00
Total for 210 - Title 2A - Quality Teacher			\$900.00
<b>215 - IDEA Part B</b>			
48421	Mandt System	MANDT Training	\$70.00
Total for 215 - IDEA Part B			\$70.00
<b>223 - CTE Career Pathways</b>			
0	Cardmember Services	Supplies and Materials Ag Barn -- Rolling tool cabinet and water hoses.	\$179.98
0	Cardmember Services	Supplies and Materials Pathway \$ for Log Splitter. Firewood fundraiser.	\$999.99
Total for 223 - CTE Career Pathways			\$1,179.97
<b>226 - Title 1A</b>			
0	Amazon Capital Services, Inc	McKinney Vento	\$79.48
0	Amazon Capital Services, Inc	McKinney Vento	\$80.44
Total for 226 - Title 1A			\$159.92
<b>229 - Textbooks</b>			
0	Cardmember Services	HS TextbooksAlgebra Spanish	\$44.95
Total for 229 - Textbooks			\$44.95
<b>232 - Outdoor School Program M99</b>			
0	First Student, Inc.	Outdoor School Transportation	\$4,096.80
Total for 232 - Outdoor School Program M99			\$4,096.80

# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

Criteria: From Check Date: 12/01/2024 To: 12/31/2024 Voucher: ALL  
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Check Number	Vendor	Description	Amount
<b>235 - Measure 98</b>			
0	Amazon Capital Services, Inc	Snacks for clubs	\$73.80
0	Amazon Capital Services, Inc	Fidget/stress supplies for emergency box	\$60.00
0	Amazon Capital Services, Inc	earbuds for check out	\$50.00
0	Amazon Capital Services, Inc	Gaming switch, accessories, supplies	\$349.00
0	Cardmember Services	Supplies	\$122.27
48427	Willamette ESD	Control Tower WESD service	\$1,361.94
48427	Willamette ESD	WESD Willamette Promise	\$2,160.82
<b>Total for 235 - Measure 98</b>			<b>\$4,177.83</b>
<b>250 - Child Nutrition Programs</b>			
48416	Ackley, Randall	Lunch Reimbursements	\$91.00
0	Amazon Capital Services, Inc	Supplies/Management	\$52.74
0	Cardmember Services	Non-Consumable UMPQUA Visa	\$96.85
48360	Franz Bakery	Food Bread Products	\$225.49
48375	Franz Bakery	Food Bread Products	\$322.02
48419	Franz Bakery	Food Bread Products	\$276.98
0	Short, Sharon D	Non-Consumable Items S.Short	\$96.00
48387	Sysco	Food Sysco	\$5,173.94
48397	Sysco	Food Sysco	\$3,203.34
48425	Sysco	Food Sysco	\$3,908.74
48366	Umpqua Dairy Products Co.	Food Milk and milk products	\$926.82
48389	Umpqua Dairy Products Co.	Food Milk and milk products	\$250.19
48398	Umpqua Dairy Products Co.	Food Milk and milk products	\$968.09
48426	Umpqua Dairy Products Co.	Food Milk and milk products	\$282.57
48426	Umpqua Dairy Products Co.	Food Milk and milk products	\$975.86
<b>Total for 250 - Child Nutrition Programs</b>			<b>\$16,850.63</b>
<b>252 - Student Success Act</b>			

# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

Criteria: From Check Date: 12/01/2024 To: 12/31/2024 Voucher: ALL  
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Check Number	Vendor	Description	Amount
<b>252 - Student Success Act</b>			
48362	Graduation Alliance Inc	Online Computer Software	\$4,355.33
48399	Verizon Wireless	Hot Spots to Support Students	\$142.69
48399	Verizon Wireless	Hot Spots to Support Students	\$22.53
<b>Total for 252 - Student Success Act</b>			<b>\$4,520.55</b>
<b>255 - Co-Curricular Fund</b>			
0	Cardmember Services	Referees/Officials	\$130.40
48376	McMinnville High School	Other Prof Serv	\$100.00
48377	Monroe High School	Supplies/Materials	\$24.00
48378	OACA	Dues & Fees	\$759.00
48380	Oregon Elite Cheer	Referees/Officials	\$125.00
48384	Salem Wrestling Officials	Referees/Officials	\$1,588.76
<b>Total for 255 - Co-Curricular Fund</b>			<b>\$2,727.16</b>
<b>264 - School Based Health and Recourse Center</b>			
48399	Verizon Wireless	Hot Spots to support students	\$22.53
48399	Verizon Wireless	Hot Spots to support students	\$142.69
<b>Total for 264 - School Based Health and Recourse Center</b>			<b>\$165.22</b>
<b>271 - Elementary ASB</b>			
48391	All for KIDZ	Elem/ASB - Payment for NED Mindset Mission Yo-Yo Sales	\$2,098.00
0	Amazon Capital Services, Inc	Supplies/Music	\$296.35
0	Amazon Capital Services, Inc	Supplies/Music	\$31.99
0	Cardmember Services	EZ Orchards Field Trip	\$279.50
0	Cardmember Services	EZ Orchards Field Trip	\$323.50
<b>Total for 271 - Elementary ASB</b>			<b>\$3,029.34</b>
<b>272 - Middle School ASB</b>			
0	Amazon Capital Services, Inc	Hasty-Elective	\$50.45

# Jefferson School District 14J

## Approval of Bills Report

Fiscal Year: 2024-2025

Criteria: From Check Date: 12/01/2024 To: 12/31/2024 Voucher: ALL  
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Check Number	Vendor	Description	Amount
<b>272 - Middle School ASB</b>			
0	Amazon Capital Services, Inc	Hasty-Elective	\$858.94
0	Amazon Capital Services, Inc	Music	\$58.94
0	Broadhurst, Sara L	Counseling supplies, suicide prevention, educational materials	\$22.48
0	Broadhurst, Sara L	Counseling supplies, suicide prevention, educational materials	\$5.00
48356	CitiBank	MS/Gotcha Open for Gotcha supplies for the year	\$82.75
48422	Mendez, Brooke A	MS Parent Teacher Committee Supplies	\$337.60
48400	Willamette Valley Music	Music	\$155.00
<b>Total for 272 - Middle School ASB</b>			<b>\$1,571.16</b>
<b>273 - High School ASB</b>			
0	Amazon Capital Services, Inc	HS/TOWEL & LOCKER	\$176.64
0	Cardmember Services	HS/Track	\$135.00
0	Cardmember Services	Krispy Kreme Doughnuts	\$900.00
0	Cardmember Services	Life Skills Fall Feast Project	\$1,066.86
48356	CitiBank	HS/LIONS DEN	\$374.76
48356	CitiBank	HS/LIONS DEN	\$814.10
48373	Fitzpatrick Painting	HS/Athletics	\$2,425.00
48424	Petty Cash - Jeri Blomberg	HS/DRAMA	\$100.00
48365	Sherwin Williams	HS/Athletics	\$265.44
<b>Total for 273 - High School ASB</b>			<b>\$6,257.80</b>
<b>300 - Debt Service Funds</b>			
0	Oregon Department of Energy	SELP Loan Interest	\$437.12
0	Oregon Department of Energy	SELP Loan Principal	\$5,312.88
<b>Total for 300 - Debt Service Funds</b>			<b>\$5,750.00</b>
<b>407 - Construction Excise Tax</b>			
48401	Benton Electric, Inc.	Capital Improvements	\$7,640.60
<b>Total for 407 - Construction Excise Tax</b>			<b>\$7,640.60</b>

Jefferson School District 14J

Approval of Bills Report

Fiscal Year: 2024-2025

Criteria:  
Report Sort: FUND

From Check Date: 12/01/2024  
From Fund: 100

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To: 999

Voucher: ALL  
☐ Page Break

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Check Number	Vendor	Description	Amount
<b>408 - Old Middle School Improvement</b>			
48417	Certified Systems LLC	JHS PA System Replacement	\$8,842.00
Total for 408 - Old Middle School Improvement			<b>\$8,842.00</b>
<b>410 - School Based Health Center</b>			
48358	Foress Sign & Manufacturing LLC	OTHER CONTRACTED SERVICES	\$4,955.10
Total for 410 - School Based Health Center			<b>\$4,955.10</b>
Grand Total:			<b>\$238,788.24</b>

End of Report

# Jefferson School District 14J

## Student Activities Summary Report

Fiscal Year: 2024-2025

From: 7/1/2024

To: 12/31/2024

☐ Print Detail

☐ Exclude Encumbrances

☒ Reverse Signs

☐ Page Break by Activity

☐ Subtotal By Journal

	Range Beg. Balance	Range Revenue	Range Expenditures	Balance	Encumbrances	Available Balance
271.0000.9701.013.701.000 ASB	6,649.42	2,099.11	(2,098.00)	6,650.53	.00	6,650.53
271.0000.9701.013.702.000 Library	424.37	1,193.29	(1,170.03)	447.63	.00	447.63
271.0000.9701.013.703.000 Faculty Account	701.10	.00	.00	701.10	.00	701.10
271.0000.9701.013.704.000 JES 1st Grade Field Trip - Fund Bal	272.41	195.00	218.09	685.50	.00	685.50
271.0000.9701.013.705.000 JES 2nd Grade Field Trip - Fund bal	395.00	.00	445.00	840.00	.00	840.00
271.0000.9701.013.706.000 PE - Beg Fund Bal	3,417.61	.00	.00	3,417.61	(300.00)	3,117.61
271.0000.9701.013.707.000 5th Grade Promotion	646.82	.00	.00	646.82	.00	646.82
271.0000.9701.013.708.000 JES 5th Grade Field Trips - Fund Bal	281.01	.00	603.99	885.00	.00	885.00
271.0000.9701.013.709.000 JES KG Field Trip - Fund Balance	715.90	110.00	(259.25)	566.65	.00	566.65
271.0000.9701.013.710.000 PTO Field Trip funds	10,544.57	4,890.00	(14,624.57)	810.00	.00	810.00
271.0000.9701.013.711.000 BFB Keegan's Garden	288.69	.00	.00	288.69	.00	288.69
271.0000.9701.013.712.000 JES 3rd Grade Field Trip - Fund Bal	2.00	.00	748.00	750.00	.00	750.00
271.0000.9701.013.713.000 Field Trips-Beg Balance	893.94	.00	.00	893.94	.00	893.94
271.0000.9701.013.714.000 JES Garden - Beg Balance	611.84	.00	.00	611.84	.00	611.84
271.0000.9701.013.715.000 JES 4th Grade Field Trip - Beg Balance	250.00	.00	605.00	855.00	.00	855.00
271.0000.9701.013.716.000 Explore - Sullivan	1,323.54	.00	.00	1,323.54	.00	1,323.54
271.0000.9701.013.717.000 JES Life Skills Field Trip - Fund Bal	65.00	.00	.00	65.00	.00	65.00
271.0000.9701.013.730.000 Music	7,930.42	223.70	(944.76)	7,209.36	(678.69)	6,530.67
271.0000.9701.013.731.000 Donation - United Way	2,452.84	.00	.00	2,452.84	.00	2,452.84
271.0000.9701.013.732.000 Carnival	.00	.00	.00	.00	.00	.00
271.0000.9701.013.733.000 Read-a-Thon fund raising	459.69	.00	.00	459.69	.00	459.69



Jefferson School District 14J

Student Activities Summary Report

Fiscal Year: 2024-2025

From: 7/1/2024 To: 12/31/2024

- ☐ Print Detail
- ☐ Exclude Encumbrances
- ☒ Reverse Signs
- ☐ Page Break by Activity
- ☐ Subtotal By Journal

	Range Beg. Balance	Range Revenue	Range Expenditures	Balance	Encumbrances	Available Balance
271.0000.9701.013.734.000 Social & Emotional Learning - Fund Bal	854.12	.00	.00	854.12	.00	854.12
GRAND TOTALS	39,180.29	8,711.10	(16,476.53)	31,414.86	(978.69)	30,436.17

End of Report

# Jefferson School District 14J

## Student Activities Summary Report

Fiscal Year: 2024-2025

From: 7/1/2024

To: 12/31/2024

☐ Print Detail

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☐ Subtotal By Journal

	Range Beg. Balance	Range Revenue	Range Expenditures	Balance	Encumbrances	Available Balance
272.0000.9701.001.000.000 ASB Beginning Fund Balance	88.00	.00	.00	88.00	.00	88.00
272.0000.9701.001.242.000 Life Skills - Lions Mart	.00	800.00	.00	800.00	.00	800.00
272.0000.9701.001.710.000 MS Parent Teacher Committee	1,465.44	1,476.55	(504.61)	2,437.38	(495.39)	1,941.99
272.0000.9701.001.721.000 ASB	2,362.28	.06	(330.00)	2,032.34	(250.00)	1,782.34
272.0000.9701.001.722.000 Library	1,063.04	103.06	.00	1,166.10	.00	1,166.10
272.0000.9701.001.723.000 Faculty Account	79.11	.00	.00	79.11	.00	79.11
272.0000.9701.001.724.000 JMS AVID Notebooks	304.96	.00	(100.00)	204.96	.00	204.96
272.0000.9701.001.725.000 General Fees	(103.44)	700.00	.00	596.56	.00	596.56
272.0000.9701.001.726.000 School Wide Fundraiser	.00	.00	.00	.00	.00	.00
272.0000.9701.001.727.000 Gotcha	984.35	678.75	(655.60)	1,007.50	(344.40)	663.10
272.0000.9701.001.728.000 MS - Hardship	20.00	.00	.00	20.00	.00	20.00
272.0000.9701.001.729.000 Harris-Elective	530.16	182.00	(56.02)	656.14	(343.98)	312.16
272.0000.9701.001.730.000 Music	2,317.68	1,530.70	(2,250.45)	1,597.93	(745.50)	852.43
272.0000.9701.001.731.000 Counseling	627.33	.00	(187.93)	439.40	(212.07)	227.33
272.0000.9701.001.732.000 Larson-Art	681.37	380.00	.00	1,061.37	.00	1,061.37
272.0000.9701.001.733.000 Chitwood-Pottery	192.61	1,400.00	(921.82)	670.79	(50.00)	620.79
272.0000.9701.001.734.000 National Junior Honor Society-NJHS	97.42	353.00	(102.63)	347.79	(147.37)	200.42
272.0000.9701.001.737.000 Choir	20.00	.00	.00	20.00	.00	20.00
272.0000.9701.001.739.000 Hart-Elective	558.95	290.00	.00	848.95	.00	848.95
272.0000.9701.001.740.000 Hasty-Elective	1,173.69	490.00	(909.39)	754.30	(40.61)	713.69
272.0000.9701.001.741.000 Class of 2027/ 8th Grade	540.66	.00	.00	540.66	.00	540.66
272.0000.9701.001.742.000 JMS Art Fund	.00	.00	.00	.00	.00	.00

Jefferson School District 14J

Student Activities Summary Report

Fiscal Year: 2024-2025

From: 7/1/2024 To: 12/31/2024

☐ Print Detail ☐ Exclude Encumbrances ☒ Reverse Signs ☐ Page Break by Activity ☐ Subtotal By Journal

	Range Beg. Balance	Range Revenue	Range Expenditures	Balance	Encumbrances	Available Balance
272.0000.9701.001.743.000 Class of 2028/7th Grade	15.00	.00	.00	15.00	.00	15.00
272.0000.9701.001.745.000 Class of 2029/6th Grade	.00	.00	.00	.00	.00	.00
272.0000.9701.001.770.000 Yearbook	1,069.08	.00	.00	1,069.08	.00	1,069.08
GRAND TOTALS	14,087.69	8,384.12	(6,018.45)	16,453.36	(2,629.32)	13,824.04

End of Report

# Jefferson School District 14J

## Student Activities Summary Report

Fiscal Year: 2024-2025

From: 7/1/2024

To: 12/31/2024

☐ Print Detail

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☐ Page Break by Activity

☐ Subtotal By Journal

	Range Beg. Balance	Range Revenue	Range Expenditures	Balance	Encumbrances	Available Balance
273.0000.9701.002.170.000 Hardship Athletics	3,300.00	.00	.00	3,300.00	.00	3,300.00
273.0000.9701.002.217.000 Student Technology Fee	80.00	.00	.00	80.00	.00	80.00
273.0000.9701.002.230.000 Athletics	2,603.29	12,384.77	(2,690.44)	12,297.62	(324.00)	11,973.62
273.0000.9701.002.231.000 Baseball	1,255.69	.00	(425.00)	830.69	.00	830.69
273.0000.9701.002.232.000 Boys Basketball	35.21	60.00	(485.00)	(389.79)	.00	(389.79)
273.0000.9701.002.233.000 Girls Basketball	167.20	.00	.00	167.20	(625.00)	(457.80)
273.0000.9701.002.234.000 US Hispanic Leadership Institute	.00	.00	.00	.00	.00	.00
273.0000.9701.002.235.000 Football	1,616.88	1,675.00	(425.00)	2,866.88	.00	2,866.88
273.0000.9701.002.236.000 Rally	2,769.78	4,002.00	(4,920.00)	1,851.78	(125.00)	1,726.78
273.0000.9701.002.237.000 Softball	5,296.06	.00	(425.00)	4,871.06	.00	4,871.06
273.0000.9701.002.238.000 Track	1,485.97	770.00	(537.00)	1,718.97	.00	1,718.97
273.0000.9701.002.239.000 Volleyball	3,628.49	2,519.00	(1,903.38)	4,244.11	.00	4,244.11
273.0000.9701.002.240.000 Wrestling	214.52	100.00	.00	314.52	(510.00)	(195.48)
273.0000.9701.002.241.000 Track Go Fund Me	1,044.74	.00	.00	1,044.74	.00	1,044.74
273.0000.9701.002.243.000 Girls Soccer	.00	.00	.00	.00	.00	.00
273.0000.9701.002.244.000 Boys Soccer	1,615.63	.00	.00	1,615.63	.00	1,615.63
273.0000.9701.002.290.000 College Credit Now BFB	1,775.50	60.00	.00	1,835.50	.00	1,835.50
273.0000.9701.002.728.000 AVID	13,627.15	.00	.00	13,627.15	.00	13,627.15
273.0000.9701.002.730.000 Media Productions	158.24	.00	.00	158.24	.00	158.24
273.0000.9701.002.731.000 Life Skills High School	2,550.12	.00	(1,392.42)	1,157.70	(357.58)	800.12
273.0000.9701.002.732.000 Jefferson Auto Club	287.18	.00	.00	287.18	.00	287.18
273.0000.9701.002.740.000 Concessions	1,144.54	2,730.00	(496.45)	3,378.09	.00	3,378.09
273.0000.9701.002.741.000 ASB	4,393.95	1,969.00	(479.61)	5,883.34	(637.04)	5,246.30

# Jefferson School District 14J

## Student Activities Summary Report

Fiscal Year: 2024-2025

From: 7/1/2024

To: 12/31/2024

☐ Print Detail

☐ Exclude Encumbrances

☒ Reverse Signs

☐ Page Break by Activity

☐ Subtotal By Journal

	Range Beg. Balance	Range Revenue	Range Expenditures	Balance	Encumbrances	Available Balance
273.0000.9701.002.742.000 Library	1,259.36	.00	(193.08)	1,066.28	.00	1,066.28
273.0000.9701.002.743.000 Faculty Account	382.84	.00	.00	382.84	.00	382.84
273.0000.9701.002.744.000 Class of 2024	846.61	.00	(876.81)	(30.20)	.00	(30.20)
273.0000.9701.002.745.000 Class of 2026	1,368.48	.00	.00	1,368.48	(1,925.00)	(556.52)
273.0000.9701.002.746.000 Class of 2025	1,416.96	80.00	876.81	2,373.77	(50.00)	2,323.77
273.0000.9701.002.747.000 Class of 2022	.00	.00	.00	.00	.00	.00
273.0000.9701.002.748.000 Class of 2023	250.00	.00	.00	250.00	.00	250.00
273.0000.9701.002.749.000 Grad Nite	.00	1,465.67	.00	1,465.67	.00	1,465.67
273.0000.9701.002.751.000 Book Security	.00	.00	.00	.00	.00	.00
273.0000.9701.002.752.000 Towel & Locker	1,937.38	250.00	(176.64)	2,010.74	.00	2,010.74
273.0000.9701.002.753.000 Hardship	5,066.18	.00	.00	5,066.18	.00	5,066.18
273.0000.9701.002.754.000 Revolving Office	156.17	180.00	.00	336.17	(133.20)	202.97
273.0000.9701.002.761.000 Horticulture	.00	.00	.00	.00	.00	.00
273.0000.9701.002.762.000 Drama	278.05	.00	(1,471.00)	(1,192.95)	.00	(1,192.95)
273.0000.9701.002.763.000 FFA	21,199.97	1,246.00	(2,159.22)	20,286.75	(753.00)	19,533.75
273.0000.9701.002.765.000 Metals	1,987.89	201.00	.00	2,188.89	.00	2,188.89
273.0000.9701.002.766.000 Music	3,234.79	160.00	(150.00)	3,244.79	.00	3,244.79
273.0000.9701.002.768.000 Equestrian	.00	.00	.00	.00	.00	.00
273.0000.9701.002.769.000 Woods	7,617.47	190.00	.00	7,807.47	.00	7,807.47
273.0000.9701.002.770.000 Yearbook	2,475.58	141.26	.00	2,616.84	(299.99)	2,316.85
273.0000.9701.002.772.000 Math	234.84	.00	.00	234.84	.00	234.84
273.0000.9701.002.773.000 Staff Development	2,114.79	.00	.00	2,114.79	.00	2,114.79
273.0000.9701.002.774.000 Beginning Foods	100.00	.00	.00	100.00	.00	100.00

# Jefferson School District 14J

## Student Activities Summary Report

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☐ Page Break by Activity

☐ Subtotal By Journal

	Range Beg. Balance	Range Revenue	Range Expenditures	Balance	Encumbrances	Available Balance
273.0000.9701.002.775.000 Art Club	1,961.93	200.00	.00	2,161.93	(180.00)	1,981.93
273.0000.9701.002.776.000 Class of 2027	345.08	.00	.00	345.08	.00	345.08
273.0000.9701.002.777.000 HS/FBLA	.00	.00	.00	.00	.00	.00
273.0000.9701.002.779.000 Honor Society	902.15	1,450.00	(940.00)	1,412.15	(179.69)	1,232.46
273.0000.9701.002.780.000 Spanish Club	4,726.86	.00	.00	4,726.86	.00	4,726.86
273.0000.9701.002.781.000 Science Club	123.17	850.00	.00	973.17	(750.00)	223.17
273.0000.9701.002.782.000 Lions Den	6,463.08	2,515.00	(2,524.64)	6,453.44	(1,850.12)	4,603.32
273.0000.9701.002.783.000 Wellness	873.63	.00	.00	873.63	(150.00)	723.63
GRAND TOTALS	116,373.40	35,198.70	(21,793.88)	129,778.22	(8,849.62)	120,928.60

End of Report



### **Superintendent Update – January 2025**

Board Members,

#### **General Update**

As you are aware, Mr. Jantzi is currently out on medical leave and most likely won't be returning until after spring break. I wanted to publicly thank all of the staff at the middle school for stepping up and taking on extra duties. Their support for each other and their students is absolutely amazing!! I also want to publicly thank Laura Pierce-Cummings and Doug Naugle for helping to provide administrative coverage at the middle school. They already have a full schedule but have been able to help the middle school on a moment's notice and will continue to fill in as needed during Mr. Jantzi's absence. I have met with middle school staff to make sure that they feel they are being supported and to address any concerns, and I will continue to check in with them on a regular basis. I am proud to work for a district where staff take care of each other in this manner.

#### **Information on Trimesters vs. Semesters**

Earlier this school year, the board had asked about why some schools choose trimesters over semesters and what the pros and cons were.

##### **Pros**

- Teachers only teach 4 classes instead of 6
- Classes and prep periods are 75 minutes in length which is a good balance
- Students only have to manage 5 classes instead 7
- Fewer transitions between classes
- More time for classes like science/band/PE for set up, dressing down, etc.
- Classes are only 12 weeks instead of 18 so students can get a fresher start sooner
- Better for freshmen and students who have IEPs

##### **Cons**

- Takes more FTE to cover classes (longer preps)
- Creates a few scheduling conflicts because there are only 5 slots instead of 7
- Courses are not year round (students only would only have math 2 of the 3 terms)
- Can be a challenge if kids move in or out of the district (other schools not on trimesters make it a challenge for earning credits)
- Adjustment for teachers to get used to teaching 1.5 lessons each day, and/or redesigning courses for meeting 60 times instead of 90 times
- Takes a lot of hard planning and readjusting FTE when switching to trimesters

#### **Follow-up from Town Hall**

There was a question that was asked at the town hall on January 13 regarding how the district would be impacted by the failed reauthorization of the rural school funding. The Secure Rural Schools and Community Self-Determination Act was first passed in 2000 and it provided federal funding to schools in 30 of Oregon's 36 counties. This bill typically paid up to \$80 million a year for schools and roads in Oregon along with wildfire prevention and conservation work. While it is unfortunate for schools to lose this funding, Jefferson School District was not one of the schools that received it, so there will be no impact to our funding or budget for the 2025-26 school year.

Sincerely,

Dawn Moorefield, Superintendent  
Jefferson School District 14J

## 2024-2025 Jefferson School District Superintendent Evaluation - Process & Timeline

Date	Activity
Aug. 29	<b>Pre-evaluation</b> <ul style="list-style-type: none"> <li>Board and superintendent will receive overview of superintendent evaluation criteria, process, and timeline.</li> </ul>
Sept. 23	<b>Public Meeting</b> <ul style="list-style-type: none"> <li>Board approves/adopt evaluation criteria, process, and timeline, ensuring the superintendent's contract and district policy for any applicable deadlines.</li> </ul>
Oct.	<b>Check- in Meeting</b> <ul style="list-style-type: none"> <li>Board approves/adopt evaluation timeline, ensuring the superintendent's contract and district policy for any applicable deadlines.</li> <li>Board meets with COSA to establish evaluation questions format.</li> <li>Board and superintendent meet to discuss progress of criteria established for evaluation, share concerns, feedback and establish if further guidance and or corrections are needed.</li> </ul>
Oct. 28	<b>Work Session</b> <ul style="list-style-type: none"> <li>To develop questions for community town hall.</li> <li>Set a date and time for the town hall in January.</li> </ul>
Nov.	<b>Work Session: <i>If needed</i></b> <ul style="list-style-type: none"> <li>To develop questions for community town hall.</li> <li>Set a date and time for the town hall in January.</li> </ul>
Jan. 13	<b>Check- in Meeting</b> <ul style="list-style-type: none"> <li>Board holds a town hall to include stakeholders in the evaluation process.</li> <li>Board and superintendent meet to discuss progress of criteria established for evaluation, share concerns, feedback and establish if further guidance and or corrections are needed. <i>(completed)</i></li> </ul>
Feb. 10	<b>Executive Session*</b> <ul style="list-style-type: none"> <li>Superintendent self-evaluation and artifacts presented.</li> <li>Superintendent exits executive session.</li> <li>Individual board member standard/ratings completed.</li> <li>Board members discuss superintendent's performance standards and goals (if applicable), reaching consensus on ratings.</li> <li>Board chair informs board that the draft summative evaluation report will be shared with the superintendent and closes executive session.</li> </ul>
Feb. 24???	<b>Executive Session* - Finalize Evaluation</b>
Mar. 10	<b>Executive Session* - Evaluation Results Discussion</b> <ul style="list-style-type: none"> <li>Board meets with the superintendent to review the evaluation results.</li> <li>Superintendent exits executive session.</li> <li>Board discusses evaluation further, if needed.</li> <li>Board exits executive session and opens public meeting to approve final summative evaluation report; reads public evaluation summary</li> <li>A copy of the adopted summative evaluation report is placed in the superintendent's personnel file.</li> <li>Board notifies the Superintendent of contract extension or non-extension.</li> </ul>
April 14	<b>Pre-Evaluation</b> <ul style="list-style-type: none"> <li>The board and superintendent discuss the process, including superintendent goal setting for the next evaluation cycle.</li> </ul>

*\*Evaluation meetings may be held in executive session unless otherwise requested by the superintendent to be done in open session ORS 192.660(2)(i).  
This adopted process and timeline shall serve as notice to the superintendent of the pending stated executive sessions within this document.*





Jefferson School District 14J  
Jefferson School District Track Committee  
*Suggested* Work Session Dates

Location: Jefferson School District Board Room

Time: 5:30pm

Dates: Thursday - February 20, 2025, March 13, 2025, and May 22, 2025

## Enrolled House Bill 2805

Sponsored by Representatives SOSA, NERON, MORGAN (Presession filed.)

CHAPTER .....

AN ACT

Relating to public meetings; creating new provisions; amending ORS 192.610, 192.680, 192.685, 192.690, 244.255, 244.260, 244.270, 244.290 and 244.350; repealing section 1, chapter 68, Oregon Laws 2023 (Enrolled Senate Bill 207); and prescribing an effective date.

**Be It Enacted by the People of the State of Oregon:**

### **PUBLIC MEETINGS (Scope of public meetings law)**

**SECTION 1.** ORS 192.610 is amended to read:

192.610. As used in ORS 192.610 to 192.690:

**(1) “Convening” means:**

**(a) Gathering in a physical location;**

**(b) Using electronic, video or telephonic technology to be able to communicate contemporaneously among participants;**

**(c) Using serial electronic written communication among participants; or**

**(d) Using an intermediary to communicate among participants.**

[(1)] **(2)** “Decision” means any determination, action, vote or final disposition upon a motion, proposal, resolution, order, ordinance or measure on which a vote of a governing body is required, at any meeting at which a quorum is present.

**(3) “Deliberation” means discussion or communication that is part of a decision-making process.**

[(2)] **(4)** “Executive session” means any meeting or part of a meeting of a governing body which is closed to certain persons for deliberation on certain matters.

[(3)] **(5)** “Governing body” means the members of any public body which consists of two or more members, with the authority to make decisions for or recommendations to a public body on policy or administration.

[(4)] **(6)** “Public body” means the state, any regional council, county, city or district, or any municipal or public corporation, or any board, department, commission, council, bureau, committee or subcommittee or advisory group or any other agency thereof.

[(5)] **(7)(a)** “Meeting” means the convening of a governing body of a public body for which a quorum is required in order to make a decision or to deliberate toward a decision on any matter.

**(b)** “Meeting” does not include any on-site inspection of any project or program[. “*Meeting*” also does not include] **or** the attendance of members of a governing body at any national, regional or state association to which the public body or the members belong.

**SECTION 2.** ORS 192.690 is amended to read:

192.690. (1) ORS 192.610 to 192.690 do not apply to **any of the following:**

(a) *[the]* Deliberations of the Psychiatric Security Review Board[,] **or** the State Board of Parole and Post-Prison Supervision[.].

(b) **Deliberations of** state agencies conducting hearings on contested cases in accordance with the provisions of ORS chapter 183[.].

(c) **Deliberations of** *[The review by]* the Workers' Compensation Board or the Employment Appeals Board of similar hearings on contested cases[.].

(d) Meetings of the state lawyers assistance committee operating under the provisions of ORS 9.568[.].

(e) Meetings of the personal and practice management assistance committees operating under the provisions of ORS 9.568[.].

(f) **Meetings of** *[the]* county child abuse multidisciplinary teams required to review child abuse cases in accordance with the provisions of ORS 418.747[.].

(g) **Meetings of** *[the]* child fatality review teams required to review child fatalities in accordance with the provisions of ORS 418.785[.].

(h) **Meetings of** *[the]* peer review committees in accordance with the provisions of ORS 441.055[.].

(i) Mediation conducted under ORS 36.252 to 36.268[.].

(j) Any judicial proceeding[.].

(k) Meetings of the Oregon Health and Science University Board of Directors or its designated committee regarding candidates for the position of president of the university or regarding sensitive business, financial or commercial matters of the university not customarily provided to competitors related to financings, mergers, acquisitions or joint ventures or related to the sale or other disposition of, or substantial change in use of, significant real or personal property, or related to health system strategies[.].

(L) *[or to]* Oregon Health and Science University faculty or staff committee meetings.

(m) **Communications between or among members of a governing body that are:**

(A) **Purely factual or educational in nature and that convey no deliberation or decision on any matter that might reasonably come before the governing body;**

(B) **Not related to any matter that, at any time, could reasonably be foreseen to come before the governing body for deliberation and decision; or**

(C) **Nonsubstantive in nature, such as communication relating to scheduling, leaves of absence and other similar matters.**

(2) Because of the grave risk to public health and safety that would be posed by misappropriation or misapplication of information considered during such review and approval, ORS 192.610 to 192.690 shall not apply to review and approval of security programs by the Energy Facility Siting Council pursuant to ORS 469.530.

**(Training on public meetings law)**

**SECTION 3. (1)(a) The Oregon Government Ethics Commission shall annually prepare training on the requirements of ORS 192.610 to 192.690 and best practices to enhance compliance with those requirements. The commission may delegate the preparation and presentation of trainings to another organization, except that the commission must approve the content of training prepared by another organization prior to presentation of the training.**

**(b) At the discretion of the commission, trainings prepared under this section may be presented in live sessions or be made available for viewing online. Training sessions may be presented to multiple governing bodies at any one time and may be presented in a prerecorded format.**

**(2)(a) Every member of a governing body of a public body with total expenditures for a fiscal year of \$1 million or more shall attend or view training prepared under this section**

at least once during the member's term of office and shall verify the member's attendance using the method prescribed by the commission.

(b) A member of a governing body who, under paragraph (a) of this subsection, is not required to attend training is nevertheless encouraged to attend training given under this section.

(3) The commission shall, at least once every five years, adjust the expenditure threshold for mandatory training described in subsection (2)(a) of this section to account for changes in inflation and shall by rule establish a new threshold, rounded to the nearest \$100,000, for mandatory training attendance under this section.

(4) This section does not apply to governing bodies of state government, as defined in ORS 174.111.

**SECTION 4.** Section 3 of this 2023 Act becomes operative on January 1, 2024.

(Expansion of Oregon Government Ethics Commission  
oversight of public meetings law)

**SECTION 5.** (1) A person who believes that a governing body has acted in violation of ORS 192.610 to 192.690 may, within 30 days of the alleged violation, file a written grievance with the public body whose governing body is alleged to have violated ORS 192.610 to 192.690, setting forth the specific facts and circumstances that the person asserts amounted to a violation of ORS 192.610 to 192.690. The grievance must state the identity of the person filing the grievance and any other information required by the Oregon Government Ethics Commission by rule.

(2) A public body receiving a written grievance filed under this section shall, within 21 days of the receipt of the grievance, provide a written response to the person:

(a) Acknowledging receipt of the grievance; and

(b)(A) Denying that the facts and circumstances as set forth in the grievance accurately reflect the conduct of the governing body and setting forth the facts and circumstances as determined by the public body and the reasons why those facts and circumstances do not amount to a violation of ORS 192.610 to 192.690;

(B) Admitting that the facts and circumstances as set forth in the grievance accurately reflect the conduct of the governing body but denying that those facts and circumstances amount to a violation of ORS 192.610 to 192.690; or

(C) Admitting that the conduct of the governing body amounted to a violation of ORS 192.610 to 192.690 and setting forth the steps the governing body will take to cure the violation, including but not limited to:

(i) Rescinding the decision taken by the governing body in violation of ORS 192.610 to 192.690; or

(ii) Acknowledging in a properly noticed and conducted public meeting held within 45 days of the governing body's original decision that:

(I) The original decision was made in violation of ORS 192.610 to 192.690;

(II) Good cause exists for the governing body to not rescind the decision; and

(III) The governing body's practices will be modified to ensure future violations of ORS 192.610 to 192.690 do not occur.

(3) The public body shall send a copy of the written grievance and the public body's response under this section to the Oregon Government Ethics Commission at the time the public body responds to the person who filed the grievance.

**SECTION 6.** ORS 192.685 is amended to read:

192.685. (1) Notwithstanding ORS 192.680, complaints of violations of [ORS 192.660] **any provision of ORS 192.610 to 192.690** alleged to have been committed by public officials may be made to the Oregon Government Ethics Commission for review and investigation as provided by ORS 244.260 and for possible imposition of civil penalties as provided by ORS 244.350.

(2) A complainant may not file a complaint with the commission under this section unless the complainant has complied with the written grievance procedures described in section 5 of this 2023 Act and:

(a) Has received a response from the public body that denies that a violation of ORS 192.610 to 192.690 occurred;

(b) Has received a response from the public body that admits that a violation of ORS 192.610 to 192.690 occurred that the public body has failed to take adequate steps to cure; or

(c) Has not received a response from the public body within the time prescribed for a response under section 5 of this 2023 Act.

(3) A complainant shall submit documentation of the complainant's actions taken under section 5 of this 2023 Act and the public body's response as described in subsection (2) of this section, if any. The commission shall dismiss any complaint filed under this section that does not satisfy the requirements of subsection (2) of this section.

[2)] (4) If a complaint satisfies the requirements of subsection (2) of this section, the commission may interview witnesses, review minutes and other records and [may] obtain and consider any other information pertaining to [executive sessions] **meetings** of the governing body of a public body for purposes of determining whether a violation of ORS [192.660] **192.610 to 192.690** occurred. Information related to an executive session conducted for a purpose authorized by ORS 192.660 shall be made available to the Oregon Government Ethics Commission for its investigation but shall be excluded from public disclosure.

[3)] (5) If the commission chooses not to pursue a complaint of a violation brought under subsection (1) of this section at any time before conclusion of a contested case hearing, the public official against whom the complaint was brought may be entitled to reimbursement of reasonable costs and attorney fees by the public body to which the official's governing body has authority to make recommendations or for which the official's governing body has authority to make decisions.

**SECTION 7.** ORS 244.260 is amended to read:

244.260. (1)(a) Any person may file with the Oregon Government Ethics Commission a signed **or electronically signed** written complaint alleging that there has been a violation of **either**:

(A) Any provision of this chapter or of any rule adopted by the commission under this chapter. The complaint shall state the person's reason for believing that a violation occurred and include any evidence relating to the alleged violation.

(B) **ORS 192.610 to 192.690. The complaint shall state the particulars of meetings of a governing body that were not in compliance with ORS 192.610 to 192.690 and shall state the person's reason for believing that a violation occurred. The person shall include any evidence relating to the alleged violation with the complaint.**

(b) If at any time the commission has reason to believe that there has been a violation of a provision of this chapter or of a rule adopted by the commission under this chapter, the commission may proceed under this section on its own motion as if the commission had received a complaint.

(2)(a) Not later than two business days after receiving a complaint under this section, the commission shall notify the person who is the subject of the complaint.

(b) Before approving a motion to proceed under this section without a complaint, the commission shall provide notice to the person believed to have committed the violation of the time and place of the hearing at which the motion will be discussed. If the commission decides to proceed on its own motion, the commission shall give notice to the person not later than two business days after the motion is approved.

(c) The commission shall give notice of the complaint or motion under paragraph (a) or (b) of this subsection. The notice must describe the nature of the alleged violation. The notice must include copies of all materials submitted with a complaint. If the commission will consider a motion to proceed without a complaint, the notice must provide copies of all materials that the commission will consider at the hearing on the motion.

(d) Information that the commission considers before approving a motion to proceed on its own motion under this section and any correspondence regarding the motion or potential violation is

confidential. The executive director of the commission and the commission members and staff may not make any public comment or publicly disclose any materials relating to the motion pending the commission's approval to proceed. A person who intentionally violates this paragraph is subject to a civil penalty in an amount not to exceed \$1,000. Any person aggrieved as a result of a violation of this paragraph by the executive director or a member of the commission or its staff may file a petition in a court of competent jurisdiction in the county in which the petitioner resides in order to enforce the civil penalty provided in this paragraph.

(3) After the commission receives a complaint or decides to proceed on its own motion, the executive director of the commission shall undertake action in the Preliminary Review Phase to determine whether there is cause to undertake an investigation. If the person who is the subject of the action is a member of the Legislative Assembly, the executive director shall determine whether the alleged violation involves conduct protected by Article IV, section 9, of the Oregon Constitution.

(4)(a) The Preliminary Review Phase begins on the date the complaint is filed or the date the commission decides to proceed on its own motion and ends on the date the executive director completes the statement of the facts determined during the phase under paragraph (d) of this subsection. The Preliminary Review Phase may not exceed 60 days unless a complaint is filed under this section with respect to a person who is a candidate for elective public office, the complaint is filed within 61 days before the date of an election at which the person is a candidate for nomination or election and a delay is requested in writing by the candidate. If the candidate makes a request under this paragraph, the Preliminary Review Phase must be completed not later than 60 days after the date of the election.

(b) During the Preliminary Review Phase, the executive director of the commission may seek, solicit or otherwise obtain any books, papers, records, memoranda or other additional information, administer oaths and take depositions necessary to determine whether there is cause to undertake an investigation or whether the alleged violation involves conduct protected by Article IV, section 9, of the Oregon Constitution.

(c) The Preliminary Review Phase is confidential. The executive director of the commission and any commission members and staff may acknowledge receipt of a complaint but may not make any public comment or publicly disclose any materials relating to a case during the Preliminary Review Phase. A person who intentionally violates this paragraph is subject to a civil penalty in an amount not to exceed \$1,000. Any person aggrieved as a result of a violation of this paragraph by the executive director or a member of the commission or its staff may file a petition in a court of competent jurisdiction in the county in which the petitioner resides in order to enforce the civil penalty provided in this paragraph.

(d)(A) At the end of the Preliminary Review Phase, the executive director of the commission shall prepare a statement of the facts determined during the phase, including appropriate legal citations and relevant authorities. Before presentation to the commission, the executive director's statement shall be reviewed by legal counsel to the commission.

(B) Following the conclusion of the Preliminary Review Phase, the executive director of the commission shall attend an executive session of the commission where the executive director shall present the statement of the facts and summarize the results of the Preliminary Review Phase to the commission and recommend to the commission whether there is cause to undertake an investigation or whether the commission should instead dismiss the complaint or rescind its motion.

(C) At the executive session, the commission shall consider the recommendation of the executive director and make the final determination as to whether there is cause to undertake an investigation or whether the commission should instead dismiss the complaint or rescind its motion.

(D) All case related materials and proceedings shall be open to the public after the commission makes a finding of cause to undertake an investigation, dismisses a complaint or rescinds a motion.

(e) The time limit imposed in this subsection and the commission's inquiry are suspended if a court has enjoined the executive director or the commission from continuing the inquiry.

(5)(a) If the commission determines that there is not cause to undertake an investigation or that the alleged violation of this chapter involves conduct protected by Article IV, section 9, of the Oregon Constitution, the commission shall dismiss the complaint or rescind its motion and formally enter the dismissal or rescission in its records. If the commission considers the recommendation of the executive director in an executive session but the commission does not affirmatively vote to undertake an investigation, dismiss the complaint or rescind its motion, the nonaction taken by the commission shall be considered a dismissal of the complaint or a rescission of its motion. The commission shall notify the person who is the subject of action under this section of the dismissal or rescission. After dismissal or rescission, the commission may not take further action involving the person unless a new and different complaint is filed or action on the commission's own motion is undertaken based on different conduct.

(b) If the commission makes a finding of cause to undertake an investigation, the commission shall undertake action in the Investigatory Phase. The commission shall notify the person who is the subject of the investigation, identify the issues to be examined and confine the investigation to those issues. If the commission finds reason to expand the investigation, the commission shall move to do so, record in its minutes the issues to be examined before expanding the scope of its investigation and formally notify the complainant, if any, and the person who is the subject of the investigation of the expansion and the scope of the investigation.

(6)(a) The Investigatory Phase begins on the date the commission makes a finding of cause to undertake an investigation and ends on the date the commission dismisses the complaint, rescinds its own motion, issues a settlement order, moves to commence a contested case proceeding or takes other action justified by the findings. Except as provided in this subsection, the Investigatory Phase may not exceed 180 days unless a delay is stipulated to by both the person who is the subject of action under this section and the commission with the commission reserving a portion of the delay period to complete its actions.

(b) During the Investigatory Phase, the commission may seek any additional information, administer oaths, take depositions and issue subpoenas to compel attendance of witnesses and the production of books, papers, records, memoranda or other information necessary to complete the investigation. If any person fails to comply with any subpoena issued under this paragraph or refuses to testify on any matters on which the person may be lawfully interrogated, the commission shall follow the procedure described in ORS 183.440 to compel compliance.

(c) The time limit imposed in this subsection and the commission's investigation:

(A) May be suspended if there is a pending criminal investigation that relates to the issues arising out of the underlying facts or conduct at issue in the matter before the commission and the commission determines that it cannot adequately complete its investigation until the pending criminal investigation is complete; *[or]*

**(B) May be suspended if a suit is commenced under ORS 192.680 concerning the same meetings of a governing body that are the subject of the investigation by the commission, until a final adjudication of the suit has been made; or**

~~[(B)]~~ (C) Are suspended if a court has enjoined the commission from continuing its investigation.

(d) At the end of the Investigatory Phase, the commission shall take action by order. The action may include:

(A) Dismissal, with or without comment;

(B) Continuation of the investigation for a period not to exceed 30 days for the purpose of additional fact-finding;

(C) Moving to a contested case proceeding;

(D) Entering into a negotiated settlement; or

(E) Taking other appropriate action if justified by the findings.

(e) The commission may move to a contested case proceeding if the commission determines that the information presented to the commission is sufficient to make a preliminary finding of:

**(A) A violation of any provision of this chapter or of any rule adopted by the commission under this chapter; or**

**(B) A violation of any provision of ORS 192.610 to 192.690.**

(7) A person conducting any inquiry or investigation under this section shall:

(a) Conduct the inquiry or investigation in an impartial and objective manner; and

(b) Provide to the executive director or the commission all favorable and unfavorable information the person collects.

(8) The commission shall report the findings of any inquiry or investigation in an impartial manner. The commission shall report both favorable and unfavorable findings and shall make the findings available to:

(a) The person who is the subject of the inquiry or investigation;

(b) The appointing authority, if any;

(c) The Attorney General, if the findings relate to a state public official;

(d) The appropriate district attorney, if the findings relate to a local public official; [and]

(e) The Commission on Judicial Fitness and Disability, if the findings relate to a judge; and

**(f) The governing body of a public body, if the inquiry or investigation concerns an alleged violation of ORS 192.610 to 192.690 and the person who is the subject of the inquiry or investigation is a member of that governing body.**

(9) Hearings conducted under this chapter must be held before an administrative law judge assigned from the Office of Administrative Hearings established under ORS 183.605. The procedure shall be that for a contested case under ORS chapter 183.

(10) The Oregon Government Ethics Commission may not inquire into or investigate any conduct that occurred more than four years before a complaint is filed or a motion is approved under subsection (1) of this section.

(11) This section does not prevent the commission and the person alleged to have violated any provision of this chapter or any rule adopted by the commission under this chapter from stipulating to a finding of fact concerning the violation and consenting to an appropriate penalty. The commission shall enter an order based on the stipulation and consent.

(12) At any time during proceedings conducted under this section, the commission may enter into a negotiated settlement with the person who is the subject of action under this section.

(13) As used in this section:

(a) "Cause" means that there is a substantial, objective basis for believing that an offense or violation may have been committed and the person who is the subject of an inquiry may have committed the offense or violation.

**(b) "Governing body" has the meaning given that term in ORS 192.610.**

[b] (c) "Pending" means that a prosecuting attorney is either actively investigating the factual basis of the alleged criminal conduct, is preparing to seek or is seeking an accusatory instrument, has obtained an accusatory instrument and is proceeding to trial or is in trial or in the process of negotiating a plea.

**SECTION 7a. If Senate Bill 207 becomes law, section 1, chapter 68, Oregon Laws 2023 (Enrolled Senate Bill 207) (amending ORS 244.260), is repealed and ORS 244.260, as amended by section 7 of this 2023 Act, is amended to read:**

244.260. (1)(a) Any person may file with the Oregon Government Ethics Commission a signed or electronically signed written complaint alleging that there has been a violation of either:

(A) Any provision of this chapter or of any rule adopted by the commission under this chapter. The complaint shall state the person's reason for believing that a violation occurred and include any evidence relating to the alleged violation.

(B) ORS 192.610 to 192.690. The complaint shall state the particulars of meetings of a governing body that were not in compliance with ORS 192.610 to 192.690 and shall state the person's reason for believing that a violation occurred. The person shall include any evidence relating to the alleged violation with the complaint.

(b) If at any time the commission has reason to believe that there has been a violation of a provision of this chapter or **ORS 192.660** or [of] a rule adopted by the commission under this chap-



ter, the commission may proceed under this section on its own motion as if the commission had received a complaint.

(2)(a) Not later than two business days after receiving a complaint under this section, the commission shall notify the person who is the subject of the complaint.

(b) Before approving a motion to proceed under this section without a complaint, the commission shall provide notice to the person believed to have committed the violation of the time and place of the hearing at which the motion will be discussed. If the commission decides to proceed on its own motion, the commission shall give notice to the person not later than two business days after the motion is approved.

(c) The commission shall give notice of the complaint or motion under paragraph (a) or (b) of this subsection. The notice must describe the nature of the alleged violation. The notice must include copies of all materials submitted with a complaint. If the commission will consider a motion to proceed without a complaint, the notice must provide copies of all materials that the commission will consider at the hearing on the motion.

(d) Information that the commission considers before approving a motion to proceed on its own motion under this section and any correspondence regarding the motion or potential violation is confidential. The executive director of the commission and the commission members and staff may not make any public comment or publicly disclose any materials relating to the motion pending the commission's approval to proceed. A person who intentionally violates this paragraph is subject to a civil penalty in an amount not to exceed \$1,000. Any person aggrieved as a result of a violation of this paragraph by the executive director or a member of the commission or its staff may file a petition in a court of competent jurisdiction in the county in which the petitioner resides in order to enforce the civil penalty provided in this paragraph.

(3) After the commission receives a complaint or decides to proceed on its own motion, the executive director of the commission shall undertake action in the Preliminary Review Phase to determine whether there is cause to undertake an investigation. If the person who is the subject of the action is a member of the Legislative Assembly, the executive director shall determine whether the alleged violation involves conduct protected by Article IV, section 9, of the Oregon Constitution.

(4)(a) The Preliminary Review Phase begins on the date the complaint is filed or the date the commission decides to proceed on its own motion and ends on the date the executive director completes the statement of the facts determined during the phase under paragraph (d) of this subsection. The Preliminary Review Phase may not exceed 60 days unless a complaint is filed under this section with respect to a person who is a candidate for elective public office, the complaint is filed within 61 days before the date of an election at which the person is a candidate for nomination or election and a delay is requested in writing by the candidate. If the candidate makes a request under this paragraph, the Preliminary Review Phase must be completed not later than 60 days after the date of the election.

(b) During the Preliminary Review Phase, the executive director of the commission may seek, solicit or otherwise obtain any books, papers, records, memoranda or other additional information, administer oaths and take depositions necessary to determine whether there is cause to undertake an investigation or whether the alleged violation involves conduct protected by Article IV, section 9, of the Oregon Constitution.

(c) The Preliminary Review Phase is confidential. The executive director of the commission and any commission members and staff may acknowledge receipt of a complaint but may not make any public comment or publicly disclose any materials relating to a case during the Preliminary Review Phase. A person who intentionally violates this paragraph is subject to a civil penalty in an amount not to exceed \$1,000. Any person aggrieved as a result of a violation of this paragraph by the executive director or a member of the commission or its staff may file a petition in a court of competent jurisdiction in the county in which the petitioner resides in order to enforce the civil penalty provided in this paragraph.

(d)(A) At the end of the Preliminary Review Phase, the executive director of the commission shall prepare a statement of the facts determined during the phase, including appropriate legal citations and relevant authorities. Before presentation to the commission, the executive director's statement shall be reviewed by legal counsel to the commission.

(B) Following the conclusion of the Preliminary Review Phase, the executive director of the commission shall attend an executive session of the commission where the executive director shall present the statement of the facts and summarize the results of the Preliminary Review Phase to the commission and recommend to the commission whether there is cause to undertake an investigation or whether the commission should instead dismiss the complaint or rescind its motion.

(C) At the executive session, the commission shall consider the recommendation of the executive director and make the final determination as to whether there is cause to undertake an investigation or whether the commission should instead dismiss the complaint or rescind its motion.

(D) All case related materials and proceedings shall be open to the public after the commission makes a finding of cause to undertake an investigation, dismisses a complaint or rescinds a motion.

(e) The time limit imposed in this subsection and the commission's inquiry are suspended if a court has enjoined the executive director or the commission from continuing the inquiry.

(5)(a) If the commission determines that there is not cause to undertake an investigation or that the alleged violation of this chapter involves conduct protected by Article IV, section 9, of the Oregon Constitution, the commission shall dismiss the complaint or rescind its motion and formally enter the dismissal or rescission in its records. If the commission considers the recommendation of the executive director in an executive session but the commission does not affirmatively vote to undertake an investigation, dismiss the complaint or rescind its motion, the nonaction taken by the commission shall be considered a dismissal of the complaint or a rescission of its motion. The commission shall notify the person who is the subject of action under this section of the dismissal or rescission. After dismissal or rescission, the commission may not take further action involving the person unless a new and different complaint is filed or action on the commission's own motion is undertaken based on different conduct.

(b) If the commission makes a finding of cause to undertake an investigation, the commission shall undertake action in the Investigatory Phase. The commission shall notify the person who is the subject of the investigation, identify the issues to be examined and confine the investigation to those issues. If the commission finds reason to expand the investigation, the commission shall move to do so, record in its minutes the issues to be examined before expanding the scope of its investigation and formally notify the complainant, if any, and the person who is the subject of the investigation of the expansion and the scope of the investigation.

(6)(a) The Investigatory Phase begins on the date the commission makes a finding of cause to undertake an investigation and ends on the date the commission dismisses the complaint, rescinds its own motion, issues a settlement order, moves to commence a contested case proceeding or takes other action justified by the findings. Except as provided in this subsection, the Investigatory Phase may not exceed 180 days unless a delay is stipulated to by both the person who is the subject of action under this section and the commission with the commission reserving a portion of the delay period to complete its actions.

(b) During the Investigatory Phase, the commission may seek any additional information, administer oaths, take depositions and issue subpoenas to compel attendance of witnesses and the production of books, papers, records, memoranda or other information necessary to complete the investigation. If any person fails to comply with any subpoena issued under this paragraph or refuses to testify on any matters on which the person may be lawfully interrogated, the commission shall follow the procedure described in ORS 183.440 to compel compliance.

(c) The time limit imposed in this subsection and the commission's investigation:

(A) May be suspended if there is a pending criminal investigation that relates to the issues arising out of the underlying facts or conduct at issue in the matter before the commission and the commission determines that it cannot adequately complete its investigation until the pending criminal investigation is complete;

(B) May be suspended if a suit is commenced under ORS 192.680 concerning the same meetings of a governing body that are the subject of the investigation by the commission, until a final adjudication of the suit has been made; or

(C) Are suspended if a court has enjoined the commission from continuing its investigation.

(d) At the end of the Investigatory Phase, the commission shall take action by order. The action may include:

(A) Dismissal, with or without comment;

(B) Continuation of the investigation for a period not to exceed 30 days for the purpose of additional fact-finding;

(C) Moving to a contested case proceeding;

(D) Entering into a negotiated settlement; or

(E) Taking other appropriate action if justified by the findings.

(e) The commission may move to a contested case proceeding if the commission determines that the information presented to the commission is sufficient to make a preliminary finding of:

(A) A violation of any provision of this chapter or of any rule adopted by the commission under this chapter; or

(B) A violation of any provision of ORS 192.610 to 192.690.

(7) A person conducting any inquiry or investigation under this section shall:

(a) Conduct the inquiry or investigation in an impartial and objective manner; and

(b) Provide to the executive director or the commission all favorable and unfavorable information the person collects.

(8) The commission shall report the findings of any inquiry or investigation in an impartial manner. The commission shall report both favorable and unfavorable findings and shall make the findings available to:

(a) The person who is the subject of the inquiry or investigation;

(b) The appointing authority, if any;

(c) The Attorney General, if the findings relate to a state public official;

(d) The appropriate district attorney, if the findings relate to a local public official;

(e) The Commission on Judicial Fitness and Disability, if the findings relate to a judge; and

(f) The governing body of a public body, if the inquiry or investigation concerns an alleged violation of ORS 192.610 to 192.690 and the person who is the subject of the inquiry or investigation is a member of that governing body.

(9) Hearings conducted under this chapter must be held before an administrative law judge assigned from the Office of Administrative Hearings established under ORS 183.605. The procedure shall be that for a contested case under ORS chapter 183.

(10) The Oregon Government Ethics Commission may not inquire into or investigate any conduct that occurred more than four years before a complaint is filed or a motion is approved under subsection (1) of this section.

(11) This section does not prevent the commission and the person alleged to have violated any provision of this chapter **or ORS 192.660** or any rule adopted by the commission under this chapter from stipulating to a finding of fact concerning the violation and consenting to an appropriate penalty. The commission shall enter an order based on the stipulation and consent.

(12) At any time during proceedings conducted under this section, the commission may enter into a negotiated settlement with the person who is the subject of action under this section.

(13) As used in this section:

(a) "Cause" means that there is a substantial, objective basis for believing that an offense or violation may have been committed and the person who is the subject of an inquiry may have committed the offense or violation.

(b) "Governing body" has the meaning given that term in ORS 192.610.

(c) "Pending" means that a prosecuting attorney is either actively investigating the factual basis of the alleged criminal conduct, is preparing to seek or is seeking an accusatory instrument, has

obtained an accusatory instrument and is proceeding to trial or is in trial or in the process of negotiating a plea.

**SECTION 7b. If Senate Bill 207 becomes law, the amendments to ORS 244.260 by section 7a of this 2023 Act become operative on January 1, 2024.**

**SECTION 8.** ORS 192.680 is amended to read:

192.680. (1) A decision made by a governing body of a public body in violation of ORS 192.610 to 192.690 shall be voidable. The decision shall not be voided if the governing body of the public body reinstates the decision while in compliance with ORS 192.610 to 192.690. A decision that is reinstated is effective from the date of its initial adoption.

(2) Any person affected by a decision of a governing body of a public body may commence a suit in the circuit court for the county in which the governing body ordinarily meets, for the purpose of requiring compliance with, or the prevention of violations of ORS 192.610 to 192.690, by members of the governing body, or to determine the applicability of ORS 192.610 to 192.690 to matters or decisions of the governing body.

(3) Notwithstanding subsection (1) of this section, if the court finds that the public body made a decision while in violation of ORS 192.610 to 192.690, the court shall void the decision of the governing body if the court finds that the violation was the result of intentional disregard of the law or willful misconduct by a quorum of the members of the governing body, unless other equitable relief is available. The court may order such equitable relief as it deems appropriate in the circumstances. The court may order payment to a successful plaintiff in a suit brought under this section of reasonable attorney fees at trial and on appeal, by the governing body, or public body of which it is a part or to which it reports.

(4) If the court makes a finding that a violation of ORS 192.610 to 192.690 has occurred under subsection (2) of this section and that the violation is the result of willful misconduct by any member or members of the governing body, that member or members shall be jointly and severally liable to the governing body or the public body of which it is a part for the amount paid by the body under subsection (3) of this section.

(5) Any suit brought under subsection (2) of this section must be commenced within 60 days following the date that the decision becomes public record.

(6) The provisions of this section shall be the exclusive remedy for an alleged violation of ORS 192.610 to 192.690, **except that this subsection does not apply to proceedings of the Oregon Government Ethics Commission.**

**SECTION 9.** ORS 244.255 is amended to read:

244.255. (1) The Oregon Government Ethics Commission shall estimate in advance the expenses that it will incur during a biennium in carrying out the provisions of ORS 171.725 to 171.785, [and] 171.992 **and 192.610 to 192.690** and this chapter. The commission shall also determine what percentage of the expenses should be borne by the following two groups of public bodies:

(a) Public bodies in state government; and

(b) Local governments, local service districts and special government bodies that are subject to the Municipal Audit Law.

(2) The commission shall charge each public body for the public body's share of the expenses described in subsection (1) of this section for the biennium. The amount to be charged each public body shall be determined as follows:

(a) The commission shall determine the rate to be charged public bodies in state government. The same rate shall be applied to each public body described in this paragraph. To determine the amount of the charge for each public body, the commission shall multiply the rate determined under this paragraph by the number of public officials serving the public body.

(b) The commission shall set the charge for local governments, local service districts and special government bodies that are subject to the Municipal Audit Law so that each local government, local service district or special government body described in this paragraph pays an amount of the total expenses for the group that bears the same proportion to the total expenses that the amount

charged to the local government, local service district or special government body for the municipal audit fee under ORS 297.485 bears to the total amount assessed for the municipal audit fee.

(3) Each public body shall pay to the credit of the commission the charge described in this section as an administrative expense from funds or appropriations available to the public body in the same manner as other claims against the public body are paid.

(4) All moneys received by the commission under this section shall be credited to the Oregon Government Ethics Commission Account established under ORS 244.345.

(5) The commission shall adopt rules specifying the methods for calculating and collecting the rates and charges described in this section.

(6) As used in this section:

(a) "Local government" and "local service district" have the meanings given those terms in ORS 174.116.

(b) "Public body" has the meaning given that term in ORS 174.109.

(c) "Public official," notwithstanding ORS 244.020 (15), means any person who, on the date the commission charges the public body under this section, is serving the public body as an officer or employee.

(d) "Special government body" has the meaning given that term in ORS 174.117.

(e) "State government" has the meaning given that term in ORS 174.111.

**SECTION 10.** ORS 244.270 is amended to read:

244.270. (1) If the Oregon Government Ethics Commission finds that an appointed public official has violated any provision of this chapter or any rule adopted under this chapter, **or has violated any provision of ORS 192.610 to 192.690 with intentional disregard of the law or willful misconduct**, the finding is prima facie evidence of unfitness where removal is authorized for cause either by law or pursuant to section 6, Article VII (Amended) of the Oregon Constitution.

(2) If the commission finds that a public official has violated any provision of this chapter or any rule adopted under this chapter, **or has violated any provision of ORS 192.610 to 192.690**, the commission shall notify the public body, as defined in ORS 174.109, that the public official serves. The notice shall describe the violation and any action taken by the commission. The commission shall provide the notice not later than 10 business days after the date the commission takes final action against the public official.

**SECTION 11.** ORS 244.290 is amended to read:

244.290. (1) The Oregon Government Ethics Commission shall:

(a) Prescribe forms for statements required by this chapter and provide the forms to persons required to file the statements under this chapter or pursuant to a resolution adopted under ORS 244.160.

(b) Develop a filing, coding and cross-indexing system consistent with the purposes of this chapter.

(c) Prepare and publish reports the commission finds are necessary.

(d) Accept and file any information voluntarily supplied that exceeds the requirements of this chapter.

(e) Make statements and other information filed with the commission available for public inspection and copying during regular office hours, and make copying facilities available at a charge not to exceed actual cost.

(f) Not later than February 1 of each odd-numbered year, report to the Legislative Assembly any recommended changes to provisions of ORS 171.725 to 171.785 or this chapter.

(2) The commission shall adopt rules necessary to carry out its duties under ORS 171.725 to 171.785, 171.992[, 192.660 and 192.685] **and 192.610 to 192.690** and this chapter, including rules to:

(a) Create a procedure under which items before the commission may be treated under a consent calendar and voted on as a single item;

(b) Exempt a public official who is otherwise required to file a statement pursuant to ORS 244.050 from filing the statement if the regularity, number and frequency of the meetings and actions

of the body over which the public official has jurisdiction are so few or infrequent as not to warrant the public disclosure;

(c) Establish an administrative process whereby a person subpoenaed by the commission may obtain a protective order;

(d) List criteria and establish a process for the commission to use prosecutorial discretion to decide whether to proceed with an inquiry or investigation;

(e) Establish a procedure under which the commission shall conduct accuracy audits of a sample of reports or statements filed with the commission under this chapter or ORS 171.725 to 171.785;

(f) Describe the application of provisions exempting items from the definition of "gift" in ORS 244.020;

(g) Specify when a continuing violation is considered a single violation or a separate and distinct violation for each day the violation occurs; and

(h) Set criteria for determining the amount of civil penalties that the commission may impose.

(3) The commission may adopt rules that:

(a) Limit the minimum size of, or otherwise establish criteria for or identify, the smaller classes that qualify under the class exception from the definition of "potential conflict of interest" under ORS 244.020;

(b) Require the disclosure and reporting of gifts or other compensation made to or received by a public official or candidate;

(c) Establish criteria for cases in which information relating to notices of actual or potential conflicts of interest shall, may not or may be provided to the commission under ORS 244.130; or

(d) Allow the commission to accept the filing of a statement containing less than all of the information required under ORS 244.060 and 244.070 if the public official or candidate certifies on the statement that the information contained on the statement previously filed is unchanged or certifies only as to any changed material.

(4) Not less frequently than once each calendar year, the commission shall:

(a) Consider adoption of rules the commission deems necessary to implement or interpret provisions of this chapter relating to issues the commission determines are of general interest to public officials or candidates or that are addressed by the commission or by commission staff on a recurring basis; and

(b) Review rules previously adopted by the commission to determine whether the rules have continuing applicability or whether the rules should be amended or repealed.

(5) The commission shall adopt by rule an electronic filing system under which statements required to be filed under ORS 244.050 and 244.217 must be filed, without a fee, with the commission in an electronic format.

(6) The commission shall make available in a searchable format for review by the public using the Internet:

(a) Statements filed under ORS 244.050 and 244.217;

(b) Advisory opinions issued by the commission or the executive director of the commission;

(c) Findings issued by the commission under ORS 244.260 in instances where the commission determines that there has been a violation of a provision of this chapter or of any rule adopted by the commission under this chapter. Nothing in this paragraph requires the commission to make publicly available materials that are otherwise exempt from public disclosure or that are required to be kept confidential by the commission; and

(d) Lobbyist registration statements and revisions and updates to lobbyist registration statements filed under ORS 171.740. The information required under this paragraph must be available in a searchable format for review by the public using the Internet not later than one calendar day after the lobbyist files the information with the commission.

**SECTION 12.** ORS 244.350 is amended to read:

244.350. (1) The Oregon Government Ethics Commission may impose civil penalties not to exceed:

(a) Except as provided in paragraphs (b), (c) and (d) of this subsection, \$5,000 for violation of any provision of this chapter or any resolution adopted under ORS 244.160.

(b) \$25,000 for violation of ORS 244.045.

(c) \$10,000 for willfully violating ORS 244.040.

(d) Two times the amount of the penalty provision for violating a nondisclosure agreement that is contained within each nondisclosure agreement entered into in violation of ORS 244.049.

(2)(a) Except as provided in paragraph (b) of this subsection, the commission may impose civil penalties not to exceed \$1,000 for violation of any provision of ORS [192.660] **192.610 to 192.690**.

(b) A civil penalty may not be imposed under this subsection if the violation occurred as a result of the governing body of the public body acting upon the advice of the public body's counsel.

(3) The commission may impose civil penalties not to exceed \$250 for violation of ORS 293.708. A civil penalty imposed under this subsection is in addition to and not in lieu of a civil penalty that may be imposed under subsection (1) of this section.

(4)(a) The commission may impose civil penalties on a person who fails to file the statement required under ORS 244.050 or 244.217. In enforcing this subsection, the commission is not required to follow the procedures in ORS 244.260 before finding that a violation of ORS 244.050 or 244.217 has occurred.

(b) Failure to file the required statement in timely fashion is prima facie evidence of a violation of ORS 244.050 or 244.217.

(c) The commission may impose a civil penalty of \$10 for each of the first 14 days the statement is late beyond the date set by law, or by the commission under ORS 244.050, and \$50 for each day thereafter. The maximum penalty that may be imposed under this subsection is \$5,000.

(5) In lieu of or in conjunction with finding a violation of law or any resolution or imposing a civil penalty under this section, the commission may issue a written letter of reprimand, explanation or education.

**(6)(a) A civil penalty imposed under this section for a violation of ORS 192.610 to 192.690 is a personal liability of each member of the governing body on whom the penalty is imposed and may not be paid for or indemnified by the governing body or public body that the member is associated with.**

**(b) As used in this subsection, "governing body" and "public body" have the meanings given those terms in ORS 192.610.**

## MISCELLANEOUS

**SECTION 13.** Sections 3 and 5 of this 2023 Act and ORS 192.695 are added to and made a part of ORS 192.610 to 192.690.

**SECTION 14.** Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 1, chapter 61, Oregon Laws 2023 (Enrolled House Bill 5021), for the biennium beginning July 1, 2023, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in section 1, chapter 61, Oregon Laws 2023 (Enrolled House Bill 5021), collected or received by the Oregon Government Ethics Commission, is increased by \$1,365,307.

**SECTION 15.** The unit captions used in this 2023 Act are provided only for the convenience of the reader and do not become part of the statutory law of this state or express any legislative intent in the enactment of this 2023 Act.

## EFFECTIVE DATE

**SECTION 16.** This 2023 Act takes effect on the 91st day after the date on which the 2023 regular session of the Eighty-second Legislative Assembly adjourns sine die.

**Passed by House June 8, 2023**

**Repassed by House June 25, 2023**

.....  
Timothy G. Sekerak, Chief Clerk of House

.....  
Dan Rayfield, Speaker of House

**Passed by Senate June 24, 2023**

.....  
Rob Wagner, President of Senate

**Received by Governor:**

.....M.,....., 2023

**Approved:**

.....M.,....., 2023

.....  
Tina Kotek, Governor

**Filed in Office of Secretary of State:**

.....M.,....., 2023

.....  
Secretary of State