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# Siuslaw School District 97J

## Board of Directors' Meeting Information Packet



January 8, 2025



"Home of  
the Vikings"

# SIUSLAW SCHOOL DISTRICT 97J

2111 Oak Street ♦ Florence, Oregon 97439 ♦ (541) 997-2651 ♦ Fax (541) 997-4160

School District Website: <http://www.siuslaw.k12.or.us>

***Motivating and Preparing All Students to Reach Their Greatest Potential***

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

## Board of Directors Meeting

**January 8, 2025**

Siuslaw School District 97J

6:00pm – Work Session

6:30pm – Regular Board Meeting

**DRAFT**

LOCATION: Siuslaw School District, 2111 Oak Street, Florence, Oregon

The board meeting will also be live streamed on the district's YouTube channel here:

<https://www.youtube.com/@siuslaw97j/streams>

## Notice & Agenda

The meeting of the Siuslaw School Board will be conducted in person and will also be livestreamed on the district's YouTube channel here: <https://www.youtube.com/@siuslaw97j/streams>

If you are a member of the community and wish to provide public comments, please see agenda Item 3.0 for details.

Individuals who require disability-related accommodations or modifications to participate in the board meeting should contact the [Superintendent](#) in writing prior to the meeting.

### 1.0 **SCHOOL BOARD SPECIAL MEETING WORK SESSION — 6:00PM**

#### 1.1 Board Member Organizational Time

Introduction of Arturo Ruelas, Head of Schools, Siuslaw Valley Charter School

Benjamin Cohn w/ KDPA; Audit Presentation

Return to Open Session

### 2.0 **OPENING OF REGULAR SESSION - 6:30PM**

#### 2.1 Public Session, Call to Order, Mission Statement

*"Motivating and Preparing All Students to Reach Their Greatest Potential"*

#### 2.2 Welcome of the Public, Press, and Patrons of the District

#### 2.3 Attendance – Board of Directors:

Present

Attendees

|       |  |
|-------|--|
| _____ | Brian Lacouture, Chair                                   |
| _____ | Maureen Miltenberger, Vice Chair                         |
| _____ | John Barnett, Director                                   |
| _____ | Tamara Cole, Director                                    |
| _____ | Josh Haberly, Director                                   |
| _____ | Kady Sneddon, Director                                   |
| _____ | Dianna Pimlott, Director                                 |
| _____ | Macali Lade, Student Representative to the School Board  |
| _____ | Seamus Burke, Student Representative to the School Board |

#### 2.4 Pledge of Allegiance – ES

#### 2.5 SHS Student Liaison to the Board – Claire Lindell, SHS ASB President

#### 2.6 Proclamation – School Board Appreciation – Superintendent Grzeskowiak

## 2.7 Approval of Agenda – January 8, 2025; Recommendation: Approval of Agenda – Resolution (010825-2.7)

Motion: 2<sup>nd</sup>: Ayes: Nays: Abstain:

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### 3.0 PUBLIC COMMENT

#### 3.1 Public Comment

*\*\*The Board requests that a public comment add information or a perspective that has not already been mentioned previously, and that the patron refrains from repeating a similar point; additional comments should be separate and unique, not a repetition of previous points or speakers. To provide public comment in person, if the opportunity is available on the Board agenda, please do so as directed 24 hours prior to the meeting. Those attending virtually and want to provide public comment should notify the Board secretary by submitting an email to [97j@siuslaw.k12.or.us](mailto:97j@siuslaw.k12.or.us) as directed 24 hours prior to the start of the meeting. A person speaking during the public comment portion of the meeting may comment on agenda items or activities relevant to the student body. Topics of public comment should be within the purview of the authority of the district. A person providing public comment will be allowed three minutes. Signing up to provide public comment does not guarantee time will be available. To allow for fair and equitable public comment in the same manner as those that cannot be physically in attendance, any person wishing to speak at during a Board meeting will:*

- 1. Submit notice of intent to speak by notifying the Board secretary by email or mail, 24 hours in advance of the meeting, at [97j@siuslaw.k12.or.us](mailto:97j@siuslaw.k12.or.us) with a copy of your prepared remarks for the public record.*
- 2. Submit a comment card upon entry (available at door) to the meeting to signify attendance at the meeting.*

*Any person who is allowed to speak to the Board during a meeting, should state their name, whether they are a resident of the district and, if speaking for an organization, the name of the organization. A spokesperson should be designated to represent a group with a common purpose. Comments about a specific employee or group of employees should comply with Board policy BDDH - Public Comment at Board Meetings:*

*“A person speaking during the designated portion of the agenda for public comment may offer objective criticism of district operations and programs. The Board will not hear comments regarding any individual district staff member. The Board chair will direct the visitor to the published complaint procedures for consideration of a legitimate complaint involving a staff member. Any association contract governing the employee’s rights will be followed. A commendation involving a staff member should be sent to the superintendent, who will forward it to the employee, a supervisor and the Board.”*

### 4.0 SPECIAL PRESENTATIONS/PROGRAM HIGHLIGHT PRESENTATIONS

NONE

### 5.0 CONSENT AGENDA

*\*\*The purpose of the Consent Agenda is to expedite action on routine agenda items. These items will be acted upon with one motion, second and approval of the Board, unless a member of the board wishes to pull the item for individual discussion and action. All matters listed under the Consent Agenda are those on which the board has previously deliberated or can be classified as routine items of business.*

Recommendation: Approval of Consent Agenda (Resolution 010825-5.0)

5.1 December 11, 2024, Board Meeting Minutes (Attachment)

5.2 December 2024 Financial Statement (Attachment)

5.3 Enrollment update (Attachment)

5.4 Budget Calendar (Resolution 121124-6.3) First Reading

5.5 Policy AC, AC-AR(1) and AC-AR(2) - Nondiscrimination and Civil Rights (Resolution 121124-6.4)

5.6 Policy GBN/JBA and JBA/GBA - Sexual Harassment (Resolution 121124-6.5)

5.7 Policy JFE and JFE-AR – Pregnant and/or Parenting Students (Resolution 121124-6.6)

5.8 Policies to be **DELETED** - GBN/JBA-AR(1) & JBA/GBN-AR(1) - Sexual Harassment Complaint Procedures and GBN/JBA-AR(2) & JBA/GBN-AR(2) - Federal Law (Title IX) Sexual Harassment Procedure (Resolution 121124-6.7)

Motion: 2<sup>nd</sup>: Ayes: Nays: Abstain:

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## 6.0 ACTION DISCUSSION

### 6.1 Lane ESD – Local Service Plan 2025-27, Year 1 (Resolution 010825-6.1)

Presented by Superintendent Grzeskowiak

Explanatory Statement: Every two years the Lane Education Service District produces a service plan and budget to support the school districts of Lane County. The services provided are either for shared services between districts or specialty services that any one district may not employ on their own.

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| Motion: | 2 <sup>nd</sup> : | Ayes: | Nays: | Abstain: |
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### 6.2 Family and Medical Leave – Policy GCBDA/GDBDA and Administrative Rule GCBDA/GDBDA-AR(1) (Resolution 010825-6.2) – First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: With recent updates to state law, language in the policy is being standardized to read as 'paid family medical leave insurance' that could be used to supplement sick leave of the employee. New qualifications for family leave, medical leave and safe leave are delineated. In this policy, family leave and medical leave are distinct types of leave, when previously it was simply 'family medical leave' without distinction. In general, paid family medical leave insurance can be used for family leave, medical leave and safe leave.

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|---------|-------------------|-------|-------|----------|
| Motion: | 2 <sup>nd</sup> : | Ayes: | Nays: | Abstain: |
|---------|-------------------|-------|-------|----------|

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### 6.3 Domestic Violence and Safe Leave – Policy GCBDC/GDBDC and Administrative Rule GCBDC/GDBDC (Resolution 010825-6.3) First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: With recent updates to state law, language in the policy is being standardized to read as 'paid family medical leave insurance' that could be used to supplement sick leave of the employee. New qualifications for family leave, medical leave and safe leave are delineated. In general, domestic violence and safe leave are taken:

- To seek legal or law enforcement assistance or remedies to ensure the health and safety of the employee or the employee's minor child or dependent, including preparing for and participating in protective order proceedings or other civil or criminal legal proceedings related to domestic violence, harassment, sexual assault, bias, or stalking;
- To seek medical treatment for or to recover from injuries caused by domestic violence or sexual assault to, harassment or stalking of, or the commission of a bias crime against the eligible employee or the employee's minor child or dependent;
- To obtain, or to assist a minor child or dependent in obtaining counseling from a licensed mental health professional related to an experience of domestic violence, harassment, sexual assault, bias, or stalking;
- To obtain services from a victim services provider for the eligible employee or the eligible employee's minor child or dependent; or
- To relocate or take steps to secure an existing home to ensure health and safety of the eligible employee or the employee's minor child or dependent.

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|---------|-------------------|-------|-------|----------|
| Motion: | 2 <sup>nd</sup> : | Ayes: | Nays: | Abstain: |
|---------|-------------------|-------|-------|----------|

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6.4 Paid Family and Medical Leave Insurance – Policy GCBDF/GDBDF and Administrative Rule GCBDF/GDBDF-AR (Resolution 010825-6.5) First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: With recent updates to state law, language in the policy is being standardized to read as 'paid family medical leave insurance' that could be used to supplement sick leave of the employee. New qualifications for family leave, medical leave and safe leave are delineated. Supplemental insurance for leave of the employee can be taken as either family leave or medical leave. In general, family leave may be taken:

- To care for and bond with a child during the first year after the child's birth or during the first year after the placement of the child through foster care or adoption; or
- To effectuate the legal process required for placement of a foster child or the adoption of a child; or
- To care for a family member with a serious health condition.

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| Motion: | 2 <sup>nd</sup> : | Ayes: | Abstain: |  |
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6.5 Sick Time – Policy GCBDD/GDBDD (Resolution 010825-6.4) First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: Sick Time is different from sick leave. Sick Time is accrued by substitute employees. Sick time is accumulated at a rate of 1 hour per every 30 hours of substitute work completed. In the event that a substitute employee is scheduled to cover for a regular employee, and they fall ill, sick time can be used to cover the planned work assignment and provide a partial salary for that substitute assignment.

|         |                   |       |       |          |
|---------|-------------------|-------|-------|----------|
| Motion: | 2 <sup>nd</sup> : | Ayes: | Nays: | Abstain: |
|---------|-------------------|-------|-------|----------|

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6.6 Accident and/or Incident Report – EBBB-AR(1) - (Resolution 010825-6.6)

Presented by Superintendent Grzeskowiak

Explanatory Statement: For review by the board. The reporting form is being updated to distinguish between accidents and incidents. Accidents occur beyond the regular control of individuals, whereas incidents occur as the result of a deliberate action of one or more people.

|         |                   |       |       |          |
|---------|-------------------|-------|-------|----------|
| Motion: | 2 <sup>nd</sup> : | Ayes: | Nays: | Abstain: |
|---------|-------------------|-------|-------|----------|

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6.7 Appoint Budget Member Position 5 (Resolution 010825-6.7)

Presented by Superintendent Grzeskowiak

Explanatory Statement: Administration recommends the board appoint the interested applicant to fill budget committee position 5 which expires June 30, 2027.

|         |                   |       |       |          |
|---------|-------------------|-------|-------|----------|
| Motion: | 2 <sup>nd</sup> : | Ayes: | Nays: | Abstain: |
|---------|-------------------|-------|-------|----------|

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## **7.0 REPORTS & INFORMATION**

7.1 Superintendent Communications

7.2 Business Manager Communications

7.3 Administrator Reports

7.4 Student Representative Communications

7.5 Board Chair Communications

- Future Meeting Dates & General Information
  - February 12, 2025, Regular Board Meeting
  - **February 19, 2025, Board Work Session 5:00PM**
  - March 12, 2025, Regular Board Meeting
  - April 9, 2025, Regular Board Meeting
  - May 14, 2025, Regular Board Meeting
  - June 11, 2025, Regular Board Meeting

## **7.6 BOARD MEMBER ACKNOWLEDGMENTS & COMMUNICATIONS**

7.7 Convene to Executive Session Pursuant to 192.66(2)(i) to review and evaluate the employment rated performance of the chief executive officer of any public body, employee, or staff member, unless that person requests an open hearing. This is a touchstone for the board and superintendent as part of Superintendent Evaluation Timeline

Return to Open Session

## **8.0 ADJOURNMENT**



"Home of  
the Vikings"

# **SIUSLAW SCHOOL DISTRICT 97J**

2111 Oak Street ♦ Florence, Oregon 97439 ♦ (541) 997-2651 ♦ Fax (541) 997-4160

School District Website: <http://www.siuslaw.k12.or.us>

***Motivating and Preparing All Students to Reach Their Greatest Potential***

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

## **Proclamation**

**WHEREAS**, school boards create a vision for what students should know and be able to do;

**WHEREAS**, school boards establish clear standards for student performance;

**WHEREAS**, school boards ensure that student assessments are tied to established standards;

**WHEREAS**, school boards are accountable to the community for operating schools that support student achievement;

**WHEREAS**, school boards align school district resources to ensure that students meet standards;

**WHEREAS**, school boards create a climate that supports the philosophy that all children can learn at high levels;

**WHEREAS**, school boards build collaborative relationships based on trust, teamwork and share accountability; and

**WHEREAS**, school boards are committed to continuous education and training on issues related to student achievement;

**NOW, THEREFORE**, We, hereby declare our appreciation to the members of the Siuslaw School District School Board and proclaim the month of January to be **School Board Recognition Month**.

We urge all citizens to join us in recognizing the dedication and hard work of local school board members in preparing today's students for tomorrow's world.

Signed: 

Dated: January 8, 2025



# **SIUSLAW SCHOOL DISTRICT 97J**

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|                        |                          |
|------------------------|--------------------------|
| Subject: Agenda        | Item No: 010825-2.7      |
|                        | Attachment: Yes          |
| Reason: Approve Agenda | From: Andrew Grzeskowiak |
|                        | Date: January 8, 2025    |

## **Background:**

The superintendent, board chair and vice-chair meet to prepare the agenda one week prior to the board meeting. Items of business may be suggested by any board member, staff member, student, or citizen of the district by notifying the superintendent at least five working days prior to the meeting. Any changes to the agenda must be approved by majority vote.

## **Recommendation:**

Administration recommends approval of the agenda.

## **Resolution #010825-2.7– Approve Agenda**

Be it Resolved that the Siuslaw School District Board of Directors approve the agenda as presented.

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Board Chair, Brian Lacouture

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Andrew Grzeskowiak, Superintendent





# SIUSLAW SCHOOL DISTRICT 97J

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|                          |                          |
|--------------------------|--------------------------|
| Subject: Consent Agenda  | Item No: 010825-5.0      |
|                          | Attachment: Yes          |
| Reason: Consent Business | From: Andrew Grzeskowiak |
|                          | Date: January 8, 2025    |

## **Background**

This month's consent agenda contains the following items:

5.1 December 11, 2024, Board Meeting Minutes (Attachment)

5.2 December 2024 Financial Statement (Attachment)

5.3 Enrollment update (Attachment)

5.4 Budget Calendar (Resolution 121124-6.3) First Reading

5.5 Policy AC, AC-AR(1) and AC-AR(2) - Nondiscrimination and Civil Rights (Resolution 121124-6.4)

5.6 Policy GBN/JBA and JBA/GBA - Sexual Harassment (Resolution 121124-6.5)

5.7 Policy JFE and JFE-AR – Pregnant and/or Parenting Students (Resolution 121124-6.6)

5.8 Policies to be **DELETED** - GBN/JBA-AR(1) & JBA/GBN-AR(1) - Sexual Harassment Complaint Procedures and GBN/JBA-AR(2) & JBA/GBN-AR(2) - Federal Law (Title IX) Sexual Harassment Procedure (Resolution 121124-6.7)

## **Recommendation:**

Administration recommends approval of the consent agenda as presented. The board is reminded that any consent agenda items which may require additional discussion may be added to the agenda as a regular item.

## **Resolution #010825-5.0– Consent Agenda:**

Be it Resolved that the Siuslaw School District Board approve the consent agenda as presented.

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Board Chair, Brian Lacouture

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Andrew Grzeskowiak, Superintendent



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***Motivating and Preparing All Students to Reach Their Greatest Potential***

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

## Board of Directors Meeting

**December 11, 2024**

Siuslaw School District 97J

6:00pm – Work Session

6:30pm – Regular Board Meeting

**DRAFT**

LOCATION: Siuslaw School District, 2111 Oak Street, Florence, Oregon

The board meeting will also be live streamed on the district's YouTube channel here:

<https://www.youtube.com/@siuslaw97j/streams>

## BOARD MEETING MINUTES

The meeting of the Siuslaw School Board will be conducted in person and will also be livestreamed on the district's YouTube channel here: <https://www.youtube.com/@siuslaw97j/streams>

If you are a member of the community and wish to provide public comments, please see agenda Item 3.0 for details.

Individuals who require disability-related accommodations or modifications to participate in the board meeting should contact the [Superintendent](#) in writing prior to the meeting.

### **1.0 SCHOOL BOARD SPECIAL MEETING WORK SESSION — 6:00PM**

***Chair Lacouture called the work session to order at 6:00PM***

#### **1.1 Board Member Organization Time**

Vince Adams w/ OSBA - discuss TFS

***6:01PM Vince Adams with Oregon School Board Association (OSBA) joined the meeting via Zoom. Vince reviewed with the directors the process for the superintendent evaluation that will begin soon. Dates for future meetings with Vince were also verified.***

***6:19PM Chair Lacouture adjourned the work session***

Return to Open Session

***Chair Lacouture called the Regular Board Meeting to order at 6:30PM***

**2.0 OPENING OF REGULAR SESSION - 6:30PM**

2.1 Public Session, Call to Order, Mission Statement  
*“Motivating and Preparing All Students to Reach Their Greatest Potential”*

2.2 Welcome of the Public, Press, and Patrons of the District

2.3 Attendance – Board of Directors: **Attendance taken at 6:30PM**

|                                |  |
|--------------------------------|--|
| Present                        | Attendees  |
| <u><b>Present</b></u>          | Brian Lacouture, Chair                                   |
| <u><b>Present</b></u>          | Maureen Miltenberger, Vice Chair                         |
| <u><b>Absent</b></u>           | John Barnett, Director                                   |
| <u><b>Present</b></u>          | Tamara Cole, Director                                    |
| <u><b>Present</b></u>          | Josh Haberly, Director                                   |
| <u><b>Absent</b></u>           | Kady Sneddon, Director                                   |
| <u><b>Present via Zoom</b></u> | Dianna Pimlott, Director                                 |
| <u><b>Present @ 6:56PM</b></u> | Macali Lade, Student Representative to the School Board  |
| <u><b>Present</b></u>          | Seamus Burke, Student Representative to the School Board |

2.4 Pledge of Allegiance – High School  
**High School Principal Mike Harklerode introduced flag salute student, Robert Ramsey (12<sup>th</sup> grade). Robert has a 3.69GPA and is very active in the Health Occupation CTE and Natural Resources CTE programs. Mr. Mielke said Robert is “courageous and studious”**

2.5 SHS Student Liaison to the Board – Claire Lindell, SHS ASB President  
**6:35PM Clair Lindell, High School Student Body Present gave a review to the board.**

2.6 Acknowledgement of Loss  
**Chair Lacouture acknowledges the loss of long-time teacher and coach Ethan Dougherty.**

2.7 Approval of Agenda – December 11, 2024; Recommendation: Approval of Agenda – Resolution (121124-2.6)  
**6:41PM Director Cole moved to approve the agenda as presented; Director Haberly seconded, and the motion was carried unanimously.**

|         |      |                   |         |       |           |       |          |
|---------|------|-------------------|---------|-------|-----------|-------|----------|
| Motion: | Cole | 2 <sup>nd</sup> : | Haberly | Ayes: | Unanimous | Nays: | Abstain: |
|---------|------|-------------------|---------|-------|-----------|-------|----------|

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**3.0 PUBLIC COMMENT**

3.1 Public Comment  
**6:43PM None**

#### **4.0 SPECIAL PRESENTATIONS/PROGRAM HIGHLIGHT PRESENTATIONS**

Jennifer McKenzie, District Teacher-Librarian – Siuslaw Library Media Services, annual update

**6:44PM Jennifer McKenzie, District Teacher-Librarian gave a detailed presentation of library services throughout the district. A short video was also shown highlighting student interaction within the library.**

#### **5.0 CONSENT AGENDA**

*\*\*The purpose of the Consent Agenda is to expedite action on routine agenda items. These items will be acted upon with one motion, second and approval of the Board, unless a member of the board wishes to pull the item for individual discussion and action. All matters listed under the Consent Agenda are those on which the board has previously deliberated or can be classified as routine items of business.*

Recommendation: Approval of Consent Agenda (Resolution 121124-5.0)

5.1 November 20, 2024, Board Meeting Minutes (Attachment)

5.2 SVCS Contract Updated (Attachment)

5.3 November 2024 Financial Statement (Attachment)

5.4 Enrollment update (Attachment)

5.5 Policy KBA-AR- Public Records (Resolution 112024-6.15)

5.6 Policies to be **DELETED** - EBC/EBCA - Emergency Procedures and Disaster Plans; DJCA, DJCA-AR- Personal Service Contract (Resolution 112024-6.16)

**7:04PM Director Haberly moved to approve the Consent Agenda as presented; Director Cole seconded, and the motion was carried unanimously.**

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|         |         |                   |      |       |           |       |          |
|---------|---------|-------------------|------|-------|-----------|-------|----------|
| Motion: | Haberly | 2 <sup>nd</sup> : | Cole | Ayes: | Unanimous | Nays: | Abstain: |
|---------|---------|-------------------|------|-------|-----------|-------|----------|

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#### **6.0 ACTION DISCUSSION**

6.1 Update Policy BCBA-AR- Student Representatives to the Board (Resolution 112024-6.1)

Presented by Superintendent Grzeskowiak

Explanatory Statement: At the request of the Board of Directors, language has been added to the administrative rule that permits the board to award a scholarship to Student Representatives to the Board upon the successful completion of their term of service towards their college expenses.

**7:06PM Director Cole moved to approve Update Policy BCBA-AR- Student Representatives to the Board as presented; Director Haberly seconded, and the motion was carried unanimously.**

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|         |      |                   |         |       |           |       |          |
|---------|------|-------------------|---------|-------|-----------|-------|----------|
| Motion: | Cole | 2 <sup>nd</sup> : | Haberly | Ayes: | Unanimous | Nays: | Abstain: |
|---------|------|-------------------|---------|-------|-----------|-------|----------|

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6.2 Policy FF - Naming Facilities (Resolution 121124-6.2)

Presented by Superintendent Grzeskowiak

Explanatory Statement: There is a petition from the middle school to consider naming the main gym in memoriam of a staff member that had a significant impact as an educator and coach.

**7:09PM Director Haberly moved to approve the naming of the Siuslaw Middle School main gymnasium court as "Dougherty Court" as presented; Director Cole seconded, and the motion was carried unanimously.**

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|         |         |                   |      |       |           |       |          |
|---------|---------|-------------------|------|-------|-----------|-------|----------|
| Motion: | Haberly | 2 <sup>nd</sup> : | Cole | Ayes: | Unanimous | Nays: | Abstain: |
|---------|---------|-------------------|------|-------|-----------|-------|----------|

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6.3 Budget Calendar (Resolution 121124-6.3) First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: As per policy DB-Budget Calendar – The Board will adopt annually a budget calendar that identifies dates, activities, and deadlines required for the legal presentation and adoption of the budget. The superintendent will prepare and recommend a proposed calendar for Board approval. A draft calendar is provided for review, discussion, amendment, and future adoption. The budget calendar will be adopted at the January 08, 2025, board meeting.

**7:16PM Directors requested Budget Calendar to be placed on January 8, 2025, Consent Agenda.**

6.4 Policy AC, AC-AR(1) and AC-AR(2) - Nondiscrimination and Civil Rights (Resolution 121124-6.4) First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: Amendments were made at the federal level in August 2024 to Title IX and then incorporated into legal guidance at the state level over the past few months. Those changes are reflected in Policy AC Nondiscrimination and Civil Rights, as well as the related administrative rules AC-AR(1) Discrimination or Civil Rights Complaint Procedure and AC-AR(2) Sex-Based Discrimination Under Title IX.

**7:21PM Directors requested Policy AC, AC-AR(1) and AC-AR(2) - Nondiscrimination and Civil Rights to be placed on January 8, 2025, Consent Agenda.**

6.5 Policy GBN/JBA and JBA/GBA - Sexual Harassment (Resolution 121124-6.5) First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: Amendments were made at the federal level in August 2024 to Title IX and then incorporated into legal guidance at the state level over the past few months. Those changes are reflected in Policy GBN/JBA and JBA/GBN - Sexual Harassment. Both policies are the same; by their codes, J series policies are student focused while G series policies are staff focused.

**7:25PM Directors requested Policy GBN/JBA and JBA/GBA - Sexual Harassment to be placed on January 8, 2025, Consent Agenda.**

6.6 Policy JFE and JFE-AR – Pregnant and/or Parenting Students (Resolution 121124-6.6) First Reading

Presented by Superintendent Grzeskowiak

Explanatory Statement: Amendments were made at the federal level in August 2024 to Title IX and then incorporated into legal guidance at the state level over the past few months. Those changes are reflected in Policy JFE Pregnant and/or Parenting Students and the associated administrative rule, JFE-AR Individualized Plan for Pregnant and/or Parenting Students.

**7:26PM Directors requested JFE and JFE-AR – Pregnant and/or Parenting Students to be placed on January 8, 2025, Consent Agenda.**

6.7 Deletion of Policies with recent updates to nondiscrimination (Resolution 121124-6.7) First Reading  
Presented by Superintendent Grzeskowiak

Explanatory Statement: With the adoption of Policies AC, AC-AR(1) and AC-AR(2), sexual harassment and Title IX complaint reporting procedures under the G and J series of policies are now under Policy AC, with the most current legal references. The following administrative rules can be deleted: GBN/JBA-AR(1) & JBA/GBN-AR(1) - Sexual Harassment Complaint Procedures and GBN/JBA-AR(2) & JBA/GBN-AR(2) - Federal Law (Title IX) Sexual Harassment Procedure.

**7:27PM Directors requested the *DELETION of GBN/JBA-AR(1) & JBA/GBN-AR(1) - Sexual Harassment Complaint Procedures and GBN/JBA-AR(2) & JBA/GBN-AR(2) - Federal Law (Title IX) Sexual Harassment Procedure to be placed on January 8, 2025, Consent Agenda.***

## **7.0 REPORTS & INFORMATION**

7.1 Superintendent Communications

**7:29PM**

**Personnel Report – December 11, 2024**

***New Employees – as per Board contract approval of position***

### **Certified Educators**

- ***Susan Hillmeyer – Teacher on Special Assignment, Siuslaw Elementary School; for the teaching of school counseling related lessons in homeroom classes***

### **Classified & Paraprofessional Staff**

- ***Jennifer Bennett – Bus Monitor, Transportation Department***

### **Coaching Staff & Extra Duty**

- ***None at this time***

### **Resignations, Retirements or Other separations of employment**

- ***None at this time***

### **Substitute Employees – 1 Certified long-term substitute**

7.2 Business Manager Communications

**7:41PM Business Manager, Cece Howell reported to the directors that she is working on the budget and next year's estimates for Oregon Department of Education (ODE).**

7.3 Administrator Reports

**7:43PM Principal Harklerode informed the directors that the "lock down button" at the high school was accidentally set off. He noted it was a good opportunity to see how everyone reacted in case of a real situation. Special Programs Director; Lisa Utz wanted to acknowledge the way people respond to grief / crisis situations. She said she is honored and proud of our staff, students and community how they come together in time of need.**

#### 7.4 Student Representative Communications

**7:53PM \*This is a general summary of Student Representative's comments, not related to action or agenda items**

- **Seamus Burke stated he believes too many videos are shown in class.**
- **Macali Lade stated she felt videos can be beneficial for some students.**

#### 7.5 Board Chair Communications

- Budget Committee Applications closed 9/26/24 ~ no applicants as of extension of application period
  - Board members are asked to recruit potential candidates for the Budget Committee
- Future Meeting Dates & General Information
  - December 11, 2024, Regular Board Meeting
  - January 8, 2025, Regular Board Meeting
  - February 12, 2025, Regular Board Meeting
  - *February 19, 2025, Board Work Session 5:00PM*
  - March 12, 2025, Regular Board Meeting
  - April 9, 2025, Regular Board Meeting
  - May 14, 2025, Regular Board Meeting
  - June 11, 2025, Regular Board Meeting

#### 7.6 Board Member Acknowledgements & Communications

**7:56PM \* This is a general summary of Board Director comments, not related to action or agenda items**

- **Director Miltenberger: stated Siuslaw has some amazing staff**
- **Director Haberly: Thoughts and prayers are with the Dougherty family**
- **Director Cole: No additional comment**
- **Director Pimlott: No additional comment**
- **Director Lacouture: No additional comment**

7.7 Convene to Executive Session Pursuant to 192.66(2)(i) to review and evaluate the employment rated performance of the chief executive officer of any public body, employee, or staff member, unless that person requests an open hearing. This is a touchstone for the board and superintendent as part of Superintendent Evaluation Timeline.

**7:58PM Directors convened to Executive Session to pursuant 192(2)(i). Chair Lacouture read the executive session statement: "The school board will now meet in executive session to review and evaluate the employment-related performance of the chief executive officer or any other public body, a public officer, employee or staff member who does not request an open hearing, in regard to ORS 192.660(2)(i) which allows the board to meet in executive session. No decision may be made in executive session. At the end of executive session, we will return to open session.**

**Representatives of the news media and designated staff shall be allowed to attend. Representative of the news media allowed to observe the executive session are specifically directed not to report on any of the deliberations of the executive session. No recording of the executive session is allowed without express permission from the board. At the end of executive session, the board will return to open session."**

Return to Open Session

**8:29PM Chair Lacouture resumed the Open Session meeting.**

## **8.0 ADJOURNMENT**

*With no further discussion the meeting was adjourned at 8:29Pm by Chair Lacouture.*



**REVENUES**

|                           | <b>Actual for Month</b> | <b>YTD</b>          | <b>Budget</b>       | <b>Balance</b>     | <b>Comments</b>                 |
|---------------------------|-------------------------|---------------------|---------------------|--------------------|---------------------------------|
| Beginning Balance         | \$ 6,785,128.00         | \$2,049,129         | \$3,264,587         | \$3,264,587        | Audited Beginning Bal           |
| PROPERTY TAXES            | \$1,492,460             | \$8,350,428         | \$8,750,627         | \$400,199          | Includes current and prior year |
| LOCAL OPTION              | \$288,180               | \$1,613,737         | \$1,735,893         | \$122,156          | Includes current and prior year |
| PARTICIPATION FEES        | \$0                     | \$885               | \$40,000            | \$39,115           |                                 |
| INTEREST                  | \$1                     | \$35,724            | \$127,182           | \$91,458           |                                 |
| RENTALS/DONATIONS         | \$3,249                 | \$17,458            | \$60,500            | \$43,042           |                                 |
| MISCELLANEOU/INTERMEDIATE | \$32,291                | \$75,016            | \$300,000           | \$224,984          |                                 |
| COUNTY SCHOOL FUND        | \$0                     | \$0                 | \$50,000            | \$50,000           |                                 |
| STATE SCHOOL FUND         | \$590,541               | \$4,134,495         | \$7,037,028         | \$2,902,533        |                                 |
| COMMON SCHOOL FUND        | \$0                     | \$0                 | \$183,000           | \$183,000          |                                 |
| FEDERAL FOREST FEES       | \$0                     | \$0                 | \$53,000            | \$53,000           |                                 |
| OTHER RESTRICTED FUNDS    | \$0                     | \$0                 | \$605,500           | \$605,500          |                                 |
| HIGH COST STUDENTS        | \$0                     | \$0                 | \$110,000           | \$110,000          |                                 |
| <b>TOTAL REVENUE</b>      | <b>\$2,406,722</b>      | <b>\$14,227,742</b> | <b>\$22,317,317</b> | <b>\$8,089,575</b> |                                 |

**EXPENDITURES**

|                                 | <b>Actual for Month</b>   | <b>Actual YTD</b>  | <b>Budget</b>       | <b>Balance</b>      | <b>Comments</b>                 |
|---------------------------------|---------------------------|--------------------|---------------------|---------------------|---------------------------------|
| SALARIES                        | \$934,996                 | \$4,217,307        | \$10,749,967        | \$6,532,660         |                                 |
| ASSOCIATED PAYROLL COSTS        | \$537,638                 | \$2,358,185        | \$6,756,466         | \$4,398,282         |                                 |
| PURCHASED SERVICES              | \$157,142                 | \$1,183,220        | \$2,021,159         | \$837,939           |                                 |
| SUPPLIES & MATERIALS            | \$46,373                  | \$415,705          | \$1,259,406         | \$843,701           |                                 |
| CAPITAL OUTLAY                  | \$2,709                   | \$35,970           | \$234,950           | \$198,980           |                                 |
| OTHER OBJECTS                   | \$119,302                 | \$670,636          | \$836,247           | \$165,611           | *Annual Property Insurance Paid |
| TRANSFERS                       | \$0                       | \$0                | \$150,000           | \$150,000           |                                 |
| OTHER USES                      | \$0                       | \$0                | \$309,122           | \$309,122           |                                 |
| <b>TOTAL EXPENDITURES</b>       | <b>\$1,798,160</b>        | <b>\$8,881,022</b> | <b>\$22,317,317</b> | <b>\$13,436,295</b> |                                 |
| <b>NET ENDING CASH POSITION</b> | <b><u>\$7,395,849</u></b> |                    |                     |                     |                                 |

| Fund 203<br>Special Revenue Grants | BUDGET              | ACTUAL<br>through<br>12/31/2024 |
|------------------------------------|---------------------|---------------------------------|
| <b>REVENUES</b>                    |                     |                                 |
| Local Revenues                     | \$ -                |                                 |
| State Revenue                      | \$ 1,835,793        | \$ 432,700                      |
| Federal Revenue                    | \$ 2,430,929        | \$ 449,269                      |
| Beginning Balance                  | \$ -                | \$ -                            |
| <b>TOTAL REVENUES</b>              | <b>\$ 4,266,722</b> | <b>\$ 881,969</b>               |
| <b>EXPENDITURES</b>                |                     |                                 |
| Personnel Services                 | \$ 1,445,550        | \$ 532,904                      |
| Employee Benefits                  | \$ 829,671          | \$ 295,380                      |
| Purchased Services                 | \$ 1,653,000        | \$ 117,911                      |
| Supplies & Materials               | \$ 331,500          | \$ 182,772                      |
| Capital Outlay                     | \$ -                | \$ -                            |
| Other Objects                      | \$ 7,000            | \$ 55,307                       |
| <b>TOTAL EXPENDITURES</b>          | <b>\$ 4,266,722</b> | <b>\$ 1,184,274</b>             |

| Fund 204 21st Century     | BUDGET           | ACTUAL<br>through<br>12/31/2024 |
|---------------------------|------------------|---------------------------------|
| <b>REVENUES</b>           |                  |                                 |
| Local Revenues            | \$ -             | \$ -                            |
| State Revenue             | \$ -             | \$ -                            |
| Federal Revenue           | \$ 73,580        | \$ 3,266                        |
| Beginning Balance         | \$ -             | \$ -                            |
| <b>TOTAL REVENUES</b>     | <b>\$ 73,580</b> | <b>\$ 3,266</b>                 |
| <b>EXPENDITURES</b>       |                  |                                 |
| Personnel Services        | \$ 51,000        | \$ 46,897                       |
| Employee Benefits         | \$ 17,580        | \$ 18,511                       |
| Purchased Services        | \$ -             | \$ -                            |
| Supplies & Materials      | \$ 5,000         | \$ 7,583                        |
| Initial Equipment         | \$ -             | \$ -                            |
| <b>TOTAL EXPENDITURES</b> | <b>\$ 73,580</b> | <b>\$ 72,991</b>                |

| Fund 207 Title IIA        | BUDGET           | ACTUAL           |
|---------------------------|------------------|------------------|
| <b>REVENUES</b>           |                  |                  |
| Local Revenues            | \$ -             | \$ -             |
| State Revenue             | \$ -             | \$ -             |
| Federal Revenue           | \$ 26,365        | \$ 10,000        |
| Beginning Balance         | \$ -             | \$ -             |
| <b>TOTAL REVENUES</b>     | <b>\$ 26,365</b> | <b>\$ 10,000</b> |
| <b>EXPENDITURES</b>       |                  |                  |
| Personnel Services        | \$ 7,000         | \$ -             |
| Employee Benefits         | \$ 4,365         | \$ -             |
| Purchased Services        | \$ 12,000        | \$ -             |
| Supplies & Materials      | \$ 3,000         | \$ -             |
| Other Objects             | \$ -             | \$ 10,000        |
| Capital Outlay            | \$ -             | \$ -             |
| <b>TOTAL EXPENDITURES</b> | <b>\$ 26,365</b> | <b>\$ 10,000</b> |

| Fund 209 IDEA             | BUDGET            | ACTUAL            |
|---------------------------|-------------------|-------------------|
| <b>REVENUES</b>           |                   |                   |
| Local Revenues            | \$ -              | \$ -              |
| State Revenue             | \$ -              | \$ -              |
| Federal Revenue           | \$ 341,349        | \$ -              |
| Beginning Balance         | \$ -              | \$ -              |
| <b>TOTAL REVENUES</b>     | <b>\$ 341,349</b> | <b>\$ -</b>       |
| <b>EXPENDITURES</b>       |                   |                   |
| Personnel Services        | \$ 207,064        | \$ 71,321         |
| Employee Benefits         | \$ 134,285        | \$ 40,793         |
| Purchased Services        | \$ -              | \$ -              |
| Supplies & Materials      | \$ -              | \$ -              |
| Other Objects             | \$ -              | \$ -              |
| <b>TOTAL EXPENDITURES</b> | <b>\$ 341,349</b> | <b>\$ 112,114</b> |

\*note = Grant revenues are typically claimed quarterly or following an allowable claim period. All grant expenditures are claimed as of June 30th, which is the last day of the 2024-2025 fiscal year.

\*IDEA grant cannot be claimed against until the district has spent a certain amount of GF dollars on Sped.

| Fund 210 Title I          | BUDGET              | ACTUAL            |
|---------------------------|---------------------|-------------------|
| <b>REVENUES</b>           |                     |                   |
| Local Revenues            | \$ -                | \$ -              |
| State Revenue             | \$ -                | \$ -              |
| Federal Revenue           | \$ 1,254,341        | \$ -              |
| Beginning Balance         | \$ -                | \$ -              |
| <b>TOTAL REVENUES</b>     | <b>\$ 1,254,341</b> | <b>\$ -</b>       |
| <b>EXPENDITURES</b>       |                     |                   |
| Personnel Services        | \$ 725,363          | \$ 272,579        |
| Employee Benefits         | \$ 528,978          | \$ 178,614        |
| Purchased Services        | \$ -                | \$ 44             |
| Supplies & Materials      | \$ -                | \$ 822            |
| Other Objects             | \$ -                | \$ 100            |
| <b>TOTAL EXPENDITURES</b> | <b>\$ 1,254,341</b> | <b>\$ 452,159</b> |

| Fund 212 Indian Ed        | BUDGET        | ACTUAL      |
|---------------------------|---------------|-------------|
| <b>REVENUES</b>           |               |             |
| Local Revenues            | \$ -          | \$ -        |
| State Revenue             | \$ -          | \$ -        |
| Federal Revenue           | \$ 500        | \$ -        |
| Beginning Balance         | \$ -          | \$ -        |
| <b>TOTAL REVENUES</b>     | <b>\$ 500</b> | <b>\$ -</b> |
| <b>EXPENDITURES</b>       |               |             |
| Personnel Services        | \$ -          | \$ -        |
| Employee Benefits         | \$ -          | \$ -        |
| Purchased Services        | \$ -          | \$ -        |
| Supplies & Materials      | \$ 500        | \$ -        |
| Other Objects             | \$ -          | \$ -        |
| <b>TOTAL EXPENDITURES</b> | <b>\$ 500</b> | <b>\$ -</b> |

## BUS RESERVE REVENUE/EXPENDITURE FORECAST

| Fund 232                   | BUDGET                | ACTUAL<br>12/31/2024  | PROJECTED<br>for Fiscal Year |
|----------------------------|-----------------------|-----------------------|------------------------------|
| REVENUES                   |                       |                       |                              |
| Interest                   | \$ -                  | \$ -                  | \$ -                         |
| Participation Fees         | \$ 30,000             | \$ 234                | \$ 30,000                    |
| Bus Lease Purchase         | \$ 318,000            | \$ -                  | \$ 318,000                   |
| Bus Depreciation           | \$ 223,074            | \$ -                  | \$ 223,074                   |
| Beginning Fund Balance     | <u>\$ 395,468</u>     | <u>\$ -</u>           | <u>\$ 395,468</u>            |
| <br>TOTAL REVENUES         | <br><u>\$ 966,542</u> | <br><u>\$ 234</u>     | <br><u>\$ 966,542</u>        |
| EXPENDITURES               |                       |                       |                              |
| Replacement Equipment      | \$ -                  | \$ -                  | \$ -                         |
| Lease Purchases            | \$ 318,000            | \$ -                  | \$ 318,000                   |
| Principal                  | \$ 220,000            | \$ 183,040            | \$ 220,000                   |
| Interest                   | \$ 45,530             | \$ 22,130             | \$ 45,530                    |
| Unappropriated End Balance | <u>\$ 383,012</u>     | <u>\$ -</u>           | <u>\$ 383,012</u>            |
| <br>TOTAL EXPENDITURES     | <br><u>\$ 966,542</u> | <br><u>\$ 205,170</u> | <br><u>\$ 966,542</u>        |
| <br>ESTIMATED FUND BALANCE |                       |                       | <br><u>\$ 190,532</u>        |

\*bus depreciation is entered at the end of the fiscal year

## FOOD SERVICE REVENUE/EXPENDITURE FORECAST

| Fund 240                             | BUDGET            | ACTUAL<br>through<br>12/31/2024 | PROJECTED<br>for Fiscal Year |
|--------------------------------------|-------------------|---------------------------------|------------------------------|
| <b>REVENUES</b>                      |                   |                                 |                              |
| Interest                             | \$ 50             | \$ 1                            | \$ 50                        |
| Food Service - Lunch Sales           | \$ 9,500          | \$ 1,437                        | \$ 9,500                     |
| Miscellaneous                        | \$ 1,500          |                                 | \$ 1,500                     |
| Other Restricted Grants              | \$ 58,750         | \$ 14,218                       | \$ 58,750                    |
| Federal Reimbursement                | \$ 580,000        | \$ 262,029                      | \$ 580,000                   |
| Interfund Transfers                  | \$ 130,000        |                                 | \$ 130,000                   |
| Revenue on Behalf of District        | \$ 5,000          | \$ -                            | \$ 5,000                     |
| Beginning Balance                    | \$ 3,800          | \$ -                            | \$ 3,800                     |
| <b>TOTAL RESOURCES</b>               | <b>\$ 788,600</b> | <b>\$ 277,685</b>               | <b>\$ 788,600</b>            |
| <b>EXPENDITURES</b>                  |                   |                                 |                              |
| Salary                               | \$ 244,350        | \$ 98,405                       | \$ 244,350                   |
| Benefits                             | \$ 177,500        | \$ 64,796                       | \$ 177,500                   |
| Repairs & Maintenance                | \$ -              | \$ -                            | \$ -                         |
| Equipment                            | \$ 2,500          | \$ -                            | \$ 2,500                     |
| Non-Instr. Services                  | \$ 3,000          | \$ 6,362                        | \$ 3,000                     |
| Non-Consumables                      | \$ 2,500          | \$ -                            | \$ 2,500                     |
| Supplies/Food                        | \$ 355,000        | \$ 126,622                      | \$ 355,000                   |
| Travel                               | \$ 1,000          | \$ -                            | \$ 1,000                     |
| Advertising                          | \$ 250            | \$ -                            | \$ 250                       |
| Dues & Fees                          | \$ 2,500          | \$ 621                          | \$ 2,500                     |
| Technology                           | \$ -              | \$ -                            | \$ -                         |
| Unapprop. Ending Fund Balance        | \$ -              | \$ -                            | \$ -                         |
| <b>TOTAL EXPENDITURES</b>            | <b>\$ 788,600</b> | <b>\$ 296,806</b>               | <b>\$ 788,600</b>            |
| <b>ESTIMATED ENDING FUND BALANCE</b> |                   |                                 | <b>\$ -</b>                  |

## QSCB DEBT SERVICE REVENUE/EXPENDITURE FORECAST

| Fund 302                                   | BUDGET           | ACTUAL through<br>12/31/2024 | PROJECTED for Fiscal<br>Year |
|--|------------------|------------------------------|------------------------------|
| REVENUES                                   |                  |                              |                              |
| Interest IRS                               | \$ -             | \$ -                         | \$ -                         |
| Interfund Transfer                         | \$ 20,000        | \$ -                         | \$ 20,000                    |
| Debt Service Revenue on Behalf of District | \$ 5,000         | \$ 44                        | \$ 5,000                     |
| Beginning Fund Balance                     | <u>\$ 5,000</u>  | <u>\$ -</u>                  | <u>\$ 5,000</u>              |
| TOTAL REVENUES                             | <u>\$ 30,000</u> | <u>\$ 44</u>                 | <u>\$ 30,000</u>             |
| EXPENDITURES                               |                  |                              |                              |
| Redemption of Principal                    | \$ 20,000        | \$ -                         | \$ 20,000                    |
| Interest                                   | \$ 5,000         | \$ -                         | \$ 5,000                     |
| Unappropriated End Balance                 | <u>\$ 5,000</u>  | <u>\$ -</u>                  | <u>\$ 5,000</u>              |
| TOTAL EXPENDITURES                         | <u>\$ 30,000</u> | <u>\$ -</u>                  | <u>\$ 30,000</u>             |
| ESTIMATED ENDING FUND BALANCE              |                  |                              | <u>\$ 5,000</u>              |

### CONSTRUCTION EXCISE TAX REVENUE/EXPENDITURE FORECAST

| Fund 280                             | BUDGET              | ACTUAL            | PROJECTED           |
|--------------------------------------|---------------------|-------------------|---------------------|
| <b>REVENUES</b>                      |                     |                   |                     |
| Interest                             | \$ 1,000            | \$ -              | \$ 1,000            |
| Excise Tax                           | \$ 85,000           | \$ 96,949         | \$ 85,000           |
| Miscellaneous                        |                     | \$ -              |                     |
| Beginning Fund Balance               | \$ 1,057,000        | \$ -              | \$ 1,012,000        |
| <b>TOTAL REVENUES</b>                | <b>\$ 1,143,000</b> | <b>\$ 96,949</b>  | <b>\$ 1,098,000</b> |
| <b>EXPENDITURES</b>                  |                     |                   |                     |
| Purchased Services                   | \$ 950,000          | \$ 165,361        | \$ 900,000          |
| Reserved for next year               | \$ 193,000          | \$ -              | \$ 193,000          |
| <b>TOTAL EXPENDITURES</b>            | <b>\$ 1,143,000</b> | <b>\$ 165,361</b> | <b>\$ 900,000</b>   |
| <b>ESTIMATED ENDING FUND BALANCE</b> |                     |                   | <b>\$ 193,000</b>   |

### CAPITAL PROJECTS REVENUE/EXPENDITURE FORECAST

| Fund 400                             | BUDGET        | ACTUAL      | PROJECTED     |
|--------------------------------------|---------------|-------------|---------------|
| <b>REVENUES</b>                      |               |             |               |
| Interest                             | \$ -          | \$ -        | \$ -          |
| Miscellaneous                        | \$ -          | \$ -        | \$ -          |
| Other Restricted Grants              | \$ -          | \$ -        | \$ -          |
| Beginning Fund Balance               | \$ 137        | \$ -        | \$ 137        |
| <b>TOTAL REVENUES</b>                | <b>\$ 137</b> | <b>\$ -</b> | <b>\$ 137</b> |
| <b>EXPENDITURES</b>                  |               |             |               |
| Purchased Services                   | \$ -          | \$ -        | \$ -          |
| Supplies                             | \$ -          | \$ -        | \$ -          |
| Capital Improvement                  | \$ -          | \$ -        | \$ -          |
| Transfer of Funds                    | \$ -          | \$ -        | \$ -          |
| Reserved for next year               | \$ 137        | \$ -        | \$ 137        |
| <b>TOTAL EXPENDITURES</b>            | <b>\$ 137</b> | <b>\$ -</b> | <b>\$ 137</b> |
| <b>ESTIMATED ENDING FUND BALANCE</b> |               |             | <b>\$ -</b>   |

### CONSTRUCTION FUND

| Fund 401                              | BUDGET      | \$ -        | for Fiscal Year |
|---------------------------------------|-------------|-------------|-----------------|
| <b>REVENUES</b>                       |             |             |                 |
| Interest                              | \$ -        | \$ -        | \$ -            |
| Miscellaneous                         | \$ -        | \$ -        | \$ -            |
| Loan Receipts                         | \$ -        | \$ -        | \$ -            |
| Beginning Fund Balance                | \$ -        | \$ -        | \$ -            |
| <b>TOTAL REVENUES</b>                 | <b>\$ -</b> | <b>\$ -</b> | <b>\$ -</b>     |
| <b>EXPENDITURES</b>                   |             |             |                 |
| Purchased Services                    | \$ -        | \$ -        | \$ -            |
| Facility Construction & Building Acq. | \$ -        | \$ -        | \$ -            |
| Imprvo other than Building            | \$ -        | \$ -        | \$ -            |
| Transfer of Funds                     | \$ -        | \$ -        | \$ -            |
| Reserved for next year                | \$ -        | \$ -        | \$ -            |
| <b>TOTAL EXPENDITURES</b>             | <b>\$ -</b> | <b>\$ -</b> | <b>\$ -</b>     |
| <b>ESTIMATED ENDING FUND BALANCE</b>  |             |             | <b>\$ -</b>     |

### QSCB CONSTRUCTION REVENUE/EXPENDITURE FORECAST

| Fund 402                             | BUDGET          | ACTUAL      | PROJECTED       |
|--------------------------------------|-----------------|-------------|-----------------|
| <b>REVENUES</b>                      |                 |             |                 |
| Interest                             | \$ -            | \$ -        |                 |
| Miscellaneous                        | \$ -            | \$ -        |                 |
| Beginning Fund Balance               | \$ 3,000        | \$ -        | \$ 3,000        |
| <b>TOTAL REVENUES</b>                | <b>\$ 3,000</b> | <b>\$ -</b> | <b>\$ 3,000</b> |
| <b>EXPENDITURES</b>                  |                 |             |                 |
| Purchased Services                   | \$ 3,000        | \$ -        | \$ 3,000        |
| Improve other than Building          | \$ -            | \$ -        | \$ -            |
| Reserved for next year               | \$ -            | \$ -        | \$ -            |
| <b>TOTAL EXPENDITURES</b>            | <b>\$ 3,000</b> | <b>\$ -</b> | <b>\$ 3,000</b> |
| <b>ESTIMATED ENDING FUND BALANCE</b> |                 |             | <b>\$ -</b>     |

## Student Enrollment Summary 12/20/24

|             | 2023-24 |         |         |         |        |        |        |        |        |        | 2024-25  |           |            |            |            |
|-------------|---------|---------|---------|---------|--------|--------|--------|--------|--------|--------|----------|-----------|------------|------------|------------|
| Grade Level | 9/6/23  | 10/1/23 | 11/1/23 | 12/1/23 | 1/1/24 | 2/1/24 | 3/1/24 | 4/1/24 | 5/1/24 | 6/1/24 | 9/6/2024 | 9/30/2024 | 10/31/2024 | 11/30/2024 | 12/20/2024 |
|             |         |         |         |         |        |        |        |        |        |        |          |           |            |            |            |
| KG          | 77      | 78      | 79      | 80      | 79     | 77     | 80     | 82     | 79     | 79     | 81       | 81        | 82         | 82         | 84         |
| 1           | 86      | 84      | 82      | 83      | 83     | 86     | 86     | 88     | 88     | 87     | 81       | 77        | 78         | 78         | 77         |
| 2           | 81      | 80      | 78      | 78      | 78     | 81     | 82     | 82     | 82     | 82     | 87       | 85        | 87         | 90         | 87         |
| 3           | 85      | 83      | 80      | 80      | 79     | 81     | 81     | 83     | 83     | 82     | 87       | 86        | 90         | 92         | 92         |
| 4           | 99      | 96      | 97      | 98      | 100    | 101    | 101    | 100    | 101    | 98     | 88       | 87        | 88         | 89         | 87         |
| 5           | 102     | 102     | 102     | 103     | 104    | 106    | 107    | 108    | 106    | 106    | 101      | 101       | 106        | 108        | 108        |
| ES Total    | 530     | 823     | 818     | 522     | 523    | 532    | 537    | 543    | 539    | 534    | 525      | 517       | 531        | 539        | 535        |
|             |         |         |         |         |        |        |        |        |        |        |          |           |            |            |            |
| 6           | 78      | 74      | 75      | 75      | 75     | 73     | 73     | 74     | 72     | 72     | 108      | 109       | 109        | 108        | 108        |
| 7           | 90      | 85      | 85      | 86      | 86     | 84     | 88     | 88     | 88     | 87     | 79       | 78        | 77         | 76         | 75         |
| 8           | 96      | 93      | 92      | 93      | 93     | 91     | 92     | 91     | 91     | 90     | 92       | 91        | 88         | 88         | 90         |
| MS Total    | 264     | 252     | 252     | 254     | 254    | 248    | 253    | 253    | 251    | 249    | 279      | 278       | 274        | 272        | 273        |
|             |         |         |         |         |        |        |        |        |        |        |          |           |            |            |            |
| 9           | 91      | 87      | 85      | 86      | 86     | 84     | 85     | 84     | 83     | 80     | 100      | 100       | 99         | 100        | 101        |
| 10          | 136     | 131     | 128     | 128     | 128    | 128    | 126    | 127    | 126    | 125    | 90       | 90        | 89         | 89         | 87         |
| 11          | 117     | 113     | 109     | 110     | 107    | 105    | 106    | 106    | 105    | 105    | 121      | 118       | 120        | 120        | 121        |
| 12          | 98      | 95      | 96      | 96      | 98     | 94     | 93     | 91     | 89     | 89     | 113      | 109       | 106        | 107        | 105        |
| 12+         | 2       | 2       | 4       | 4       | 4      | 4      | 4      | 4      | 4      | 4      | 4        | 4         | 4          | 4          | 3          |
| HS Total    | 444     | 428     | 422     | 424     | 423    | 415    | 414    | 412    | 407    | 403    | 428      | 421       | 418        | 420        | 417        |
|             |         |         |         |         |        |        |        |        |        |        |          |           |            |            |            |
|             |         |         |         |         |        |        |        |        |        |        |          |           |            |            |            |
| Totals      | 1238    | 1203    | 1192    | 1200    | 1200   | 1195   | 1204   | 1208   | 1197   | 1186   | 1232     | 1216      | 1223       | 1231       | 1225       |

**Siuslaw School District 97J**

**DRAFT Budget Calendar**

**For Fiscal Year 2025 - 2026**

| <b>Dates</b>        | <b>Objective / Tasks</b>  | <b>Responsible party &amp; or attendees</b>                 | <b>Publication</b> |
|---------------------|---|---|--------------------|
| Jan 2025            | Business Manager meets with Admin for Budget Input  | Supt, Bus Mgr, Admin  | N/A                |
| Feb 1 – March 2025  | Building budgets prepared   | Bldg Admins   | N/A                |
| Early Feb 2025      | Per Student allocations distributed to school based on Dec. _____ ADMr<br>(Figure will be finalized later by Legislators) | State   | N/A                |
| Late March 2025     | State revenue projections due to districts<br>(Figures may change)  | State   | N/A                |
|                     | <b>Budget Mtg – Staff Input</b><br><b>3:45pm – 5:00pm unless indicated otherwise</b>                                      |   |                    |
| Mon, Feb 24         | <b>9:30am</b> Maintenance & Transportation<br>2 board members chosen by board   | Bldg Staff,<br><b>Budget Comm,</b><br>Board, Supt, Bus Mgr  | N/A                |
| Tue, Feb 25         | Middle School – 2 board members chosen by board   |   |                    |
| Wed, Feb 26         | Elementary School – 2 board members chosen by board   |   |                    |
| Thur, Feb 27        | High School – 2 board members chosen by board   |   |                    |
| Mar 3 - April 1     | Proposed district-wide budget prepared  | Business Manager  | N/A                |
| <b>Wed, April 9</b> | First budget meeting – Budget Message<br>(Presented by the Superintendent)  | <b>Budget Comm,</b><br>Board, Supt, Bus Mgr, Admins, Public | <b>*Date TBD</b>   |
| Wed, April 23       | Budget Meeting – Public Input<br>Committee considers approving proposed budget  | <b>Budget Comm,</b><br>Board, Supt, Bus Mgr, Admins, Public | <b>*Date TBD</b>   |
| <b>Wed, May 14</b>  | Final Budget Meeting – Board finalizes budget   | Board, Supt, Bus Mgr, Admins, Public                        | <b>*Date TBD</b>   |
| <b>Wed, June 11</b> | Board adopts Approved Budget as amended   | Board, Supt, Bus Mgr, Admins, Public                        | <b>*Date TBD</b>   |

All meetings are scheduled for 6:00pm unless otherwise noted.

\*=Public meeting dates

\*\*= Published on Website at [www.siuslaw.k12.or.us](http://www.siuslaw.k12.or.us)

Regularly Scheduled Board Meetings (April 9, May 14, June 11) in Bold





# SIUSLAW SCHOOL DISTRICT 97J

*Motivating and Preparing All Students to Reach Their Greatest Potential*  
Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|   |                          |
|---|--------------------------|
| Subject: Lane ESD 2025-27 Local Service Plan - Year One | Item No: 0108254-6.1     |
|   | Attachment: Yes          |
| Reason: First Reading                                   | From: Andrew Grzeskowiak |
|   | Date: January 8, 2025    |

## **Background:**

As required by ORS 334.175, Lane Education Service District has developed a Local Service Plan. The process in developing this plan included analysis of all resolution and core service offerings available to component school districts. The **2025-27 Local Service Plan - Year One** was developed in collaboration with component district superintendents, Lane ESD administrators and staff, and reviewed and approved by the Lane ESD Board of Directors on January 7, 2025.

The Local Service Plan contains all services mandated by law. Local Service Plan services are intended to: Improve student learning; enhance the quality of instruction provided to students; assure equitable access to resources; and maximize operational and fiscal efficiencies.

The Board of Directors of the Siuslaw School District 97J has completed their annual review of the Lane ESD **2025-27 Local Service Plan - Year One** which includes services for:

- Instruction, Equity and Partnerships (School Improvement)
- Technology
- Administrative and Support
- Custom Services

The Lane ESD **2025-27 Local Service Plan** provides a two-year framework which must be approved annually by Lane ESD and component district boards no later than March 1 (ORS 334-175 (5)(b)).

## **Recommendation:**

The Administration recommends that the Board of Directors approve the Lane ESD 2025-27 Local Service Plan -Year One

## **Resolution #010825-6.1 Lane ESD 2025-27 Local Service Plan-Year One:**

Be it Resolved that the Siuslaw School District Board approve Lane ESD **2025-27 Local Service Plan-Year One** as presented.



2025-2027 (Year One)

# Local Service Plan

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*Our shared commitment to equity, empowerment, and collaboration in education.*

# About Lane Education Service District

Lane Education Service District (ESD) provides services to sixteen component districts in Lane County. Our purpose is to **SERVE** our communities!

**Support** - Provide comprehensive services in technology, school improvement, special education, and administrative services that support our component districts’ missions to achieve equitable outcomes for all students.

**Empower** - Empower educators, students, and communities by offering professional development and innovative programs to enhance culturally responsive-sustaining learning experiences.

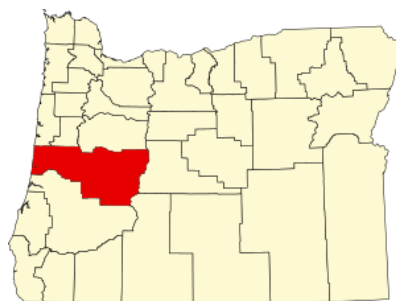
**Resource** - Deliver fiscally sound services that support equitable allocation for students countywide.

**Vision** - Cultivate a clear vision for educational excellence and equity, guiding strategic planning, and fostering a shared mission among Lane County’s invested communities.

**Engage** - Promote engagement and collaboration among educators, families, and community partners to create a supportive educational environment that promotes justice-centered engagement for all invested communities.

## Component School Districts

|                       |               |
|-----------------------|---------------|
| Bethel                | Mapleton      |
| Blachly               | Marcola       |
| Creswell              | McKenzie      |
| Crow-Applegate-Lorane | Oakridge      |
| Eugene                | Pleasant Hill |
| Fern Ridge            | Siuslaw       |
| Junction City         | South Lane    |
| Lowell                | Springfield   |



## Purpose of the Local Service Plan

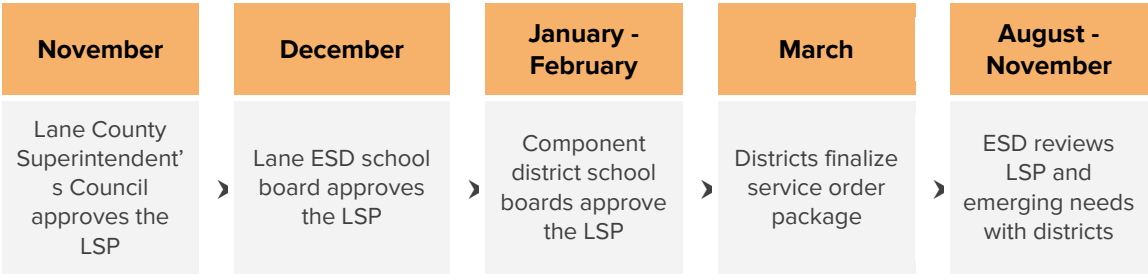
The Local Service Plan is a foundational document for Lane ESD and our component school districts, designed to outline the range of services and programs offered to support district needs. Its primary purpose is to define the services available and clarify how resources, staffing, and funding will be allocated to support districts effectively. With this document, districts can make informed decisions about which services best align with their unique needs and goals, selecting from available services each year.

Additionally, the Local Service Plan plays an essential role in promoting equity and access by ensuring that all districts—regardless of their size or individual resources—have the opportunity to access crucial educational services, especially in areas where Lane County’s smaller districts may struggle to provide these independently. The plan also promotes accountability and transparency, clearly documenting the services to be delivered and setting mutual expectations for the ESD and our component districts. This transparency enables stakeholders to assess service outcomes and effectiveness.

## Recommended Use of the Local Service Plan

The district may:

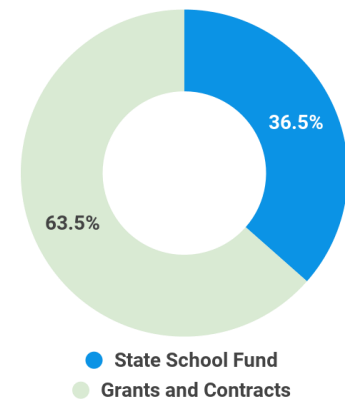
- familiarize itself with funding structures and services in the Local Service Plan.
- assess their needs and priorities to meet their goals and mission.
- determine which ESD services could provide valuable support or enhancement.
- submit its service order package to the ESD by March 31st, 2025.
- review the document throughout the year to determine if additional services are needed.



## How Services are Funded

**State School Fund** resources are provided to ESDs to offer services for children with special needs, technology, school improvement, and administrative support to component school districts as described in the Local Service Plan. Pursuant to ORS 327.019, 90% of these resources are allocated to component school districts based on weighted student population (ADMw). Of the amount allocated to districts, approximately 12% goes directly to services available to all districts (Core Services), while approximately 88% is allocated as flex funds, which can be used to purchase services through the local service plan menu (Menu Services or Custom Services).

Local Service Plan Resources



**Core Services** provide stability and flexibility in meeting student needs where the level of support may vary from district to district and year to year; this commitment supports the equitable distribution of resources for students county-wide and basic operational needs.

**Menu Services** are optional for districts to choose from using their allocated Flex funds and individual district budgets.

**Custom Services** can be requested by an individual district or group of districts based on a specific need. These services may include staffing or the provision of services.

**Grants and Contracts** support specialized, innovative, and often temporary programs or services with qualifying conditions at no cost to districts. The ESD intentionally applies for grants that extend the services of the four component areas provided through the State School Fund to support the educational mission of the county.

**State and Federal Contracts** are in place to ensure that the ESD supports school districts in implementing state and federal educational policies and programs, complies with mandates, and provides specialized services.

**Grants** are targeted funds that the ESD has identified and applied for to support specific educational programs and initiatives for the component districts.

## Core Services

Core services are available to all component districts at no cost and represent approximately 12% of the local service plan allocations to districts.

| SERVICE AREA                                    | SERVICE                            | DESCRIPTION   |
|---|------------------------------------|---|
| <i>Programs for Children with Special Needs</i> | <b>Life Skills High-Cost Pool</b>  | Provides funds to districts with an overrepresentation of Life Skills students (including districts that do not participate in the ESD Life Skills consortium).   |
| <i>Technology Support</i>                       | <b>Network Services</b>            | Provide high-speed internet access, CIPA-compliant internet filtering, 24-7 internet connectivity monitoring, and utilization reporting with reliability and equitable access as the focus areas.   |
|   | <b>Professional Development</b>    | Organize regional professional development opportunities and support local partnerships, including an internship program.   |
|   | <b>Technology Leadership</b>       | Facilitate opportunities for regional technology leaders to provide problem-solving collaboration, job-alike groups, state and regional initiatives, consortium purchases, lifecycle plan assistance, and director mentoring and coaching.  |
|   | <b>Grant Support</b>               | Assistance in the writing, coordination, and implementation of county-wide grant activities   |
|   | <b>Cybersecurity</b>               | Assist with developing and maintaining incident response plans, cybersecurity handbooks, insurance compliance, vulnerability scanning and reports.  |
| <i>School Improvement Services</i>              | <b>Curriculum and Instruction*</b> | General education curriculum and instructional services include professional development, coaching, and consultation to assist districts in curriculum adoption, instruction, and assessment. Lane ESD has content specialists in Health, Social Studies/Ethnic Studies, English Language Arts, Math, Science, Career Connected Learning, and Project Based Learning. |
|   | <b>Curriculum Leaders*</b>         | This network meets monthly during the school year and comprises district and building administrators from all 16 component districts. Experts on topics of interest give presentations, the work of component districts is featured, resources are shared, and leaders can network with job-alikes across districts.  |

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|--|---|--|
|  | <b>Promise Programs</b>                   | The Lane Regional Promise supports teachers in obtaining College Now endorsements to offer college credit for courses taken in high school.  |
|  | <b>Lane Career Academy</b>                | The Lane Career Academy collaboration provides Lane County students with technical education to access high-wage, high-demand jobs. Current programming includes HOPE Factory (construction/manufacturing); future programming to include Emergency Medical Services (EMS) and Behavioral Health.  |
| <b>Administrative and Support Services</b> | <b>Home School</b>                        | Home Schooling is a mandated service in which Lane ESD is responsible for accepting notifications from parents or guardians who intend to educate their children at home. Lane ESD is a primary information source for parents, students, schools, and districts. The ESD is also responsible for monitoring compliance with homeschool notification requirements, monitoring academic progress requirements, and providing detailed reports to districts. |
|  | <b>Attendance and Truancy Services*</b>   | Attendance and truancy support assist component school districts in meeting legal requirements regarding mandatory school attendance. This is a state-mandated service for districts with less than 1,000 students.  |
|  | <b>Connected Lane County</b>              | A contribution to Connected Lane County supports the collaborative work between districts, industry partners, workgroups, and community organizations to create opportunities and prepare underserved youth for their lives beyond high school.  |
|  | <b>Oregon Licensed Contract Dashboard</b> | Subscriptions to RS2's interactive Oregon Licensed Contract Dashboard provide access to licensed salary, benefits, insurance contributions and work schedules with the ability to create custom comparison groups.   |

\* Services provided to support districts in making progress toward the goals of the Student Success Act (see page 11).

## Menu Services

Menu services are available for individual districts to purchase as needed using flex funds or other district resources.

| SERVICE AREA                             | SERVICE                                  | DESCRIPTION  |
|--|--|--|
| Programs for Children with Special Needs | <b>Life Skills Consortium Placements</b> | <p>The Life Skills Education Program serves students with moderate, severe, and profound disabilities. Kindergarten through grade 12 classrooms are located in several elementary, middle, and high schools throughout Lane County. Students ages 18-21 are served in the Transitions Program.</p> <p>The Intensive Services Program (ISP) serves students whose support needs require environmental modifications that may not be feasible on a general education campus.</p> |
|  | <b>Lane School Placements</b>            | Lane School is a structured behavior and academic program for kindergarten through grade eight students who experience significant behavioral, social, and educational difficulties.   |
|  | <b>Behavior Disorder Consultants</b>     | Behavior Disorder Consultants provide in-service training and consultation to districts for behavior and classroom management and strategies for working with students identified as having emotional and behavioral disabilities.   |
|  | <b>School Psychologists</b>              | School Psychologists provide assessments to assist districts in determining student eligibility for special education, coordination assistance, and consultation with district staff, parents, and other professionals.  |
|  | <b>Speech Language Pathologists</b>      | Speech Language Pathologists (SLPs) support districts in assessing and providing Individualized Education Plan (IEP) related services to students with communication disorders, including articulation, cognition, language, literacy, social skills, fluency, voice, and hearing. SLPs also support Safe Eating Teams, helping establish and train protocols and guidelines for safe eating at school.  |
|  | <b>Augmentative Communication</b>        | Augmentative Communication services include evaluation, IEP support, programming equipment, and consultation with classroom teachers and specialists.  |
|  | <b>Direction Service</b>                 | Direction Service provides information and referral services to parents and districts regarding specialized services for families of students with   |



|  |  |  |
|--|--|--|
|  |  | disabilities. Direction Service also acts as a mediator between districts and parents of children with disabilities and focuses on collaborative dispute resolution.   |
|  | <b>Sign Language Interpretation Services</b> | Sign Language Interpreters facilitate communication for Deaf or Hard of Hearing (DHH) students during school hours and for school-related activities. Interpreters may also act as a resource or provide training to staff and students. Interpreters may also offer services to provide ADA accommodations for school staff and families.   |
|  | <b>MLK Jr. Education Center</b>              | The Martin Luther King, Jr. Education Center is a partnership between Lane ESD and the Lane County Department of Youth Services, providing an educational program for students with an active case with the Department of Juvenile Justice.  |
|  | <b>Nursing Services</b>                      | School Nurses provide services for students with medical conditions that may interfere with their ability to participate in their educational program. School Nurses develop Health Management Protocols, which outline specific supports needed for each student, train staff to recognize and respond to students' medical needs, and delegate medication administration and health protocols. |
| <b>Technology Support</b>                  | <b>Application Hosting and Management</b>    | Cloud and on-prem solutions, e.g. video streaming services, backup solutions, help desk solutions, cloud solutions and applications, and technology inventory solutions.   |
| <b>School Improvement Services</b>         | <b>Career and Technical Education</b>        | Career and Technical Education (CTE) staff provide leadership and services to districts so that students can enhance their 21st-century technical skills, career exploration, and successful transition to work or extended schooling.   |
|  | <b>Library Services</b>                      | Library services support districts in meeting Division 22 library and media services standards. Professional development, coaching, and consultation are provided for districts that elect this service.   |
| <b>Administrative and Support Services</b> | <b>Substitute Teacher List Subscription</b>  | Lane ESD maintains a list of approved substitute teachers and provides support with registration, training, and orientation to applicants.   |
|  | <b>Courier Services</b>                      | Lane ESD's courier services provide an efficient and secure method of moving materials between the ESD, districts, and other public agencies.  |

## Grants and Contracts

Through support from grants and contracts, Lane ESD provides certain value-added services at no cost to districts.

| SERVICE AREA                                    | PROGRAM  | DESCRIPTION   |
|---|--|---|
| <b>Programs for Children with Special Needs</b> | <b>Early Intervention / Early Childhood Special Ed</b> | Contracted service with the University of Oregon Early Childhood CARES. Grant provides EI (birth-3) and ECSE (3-5) education services to all Lane County resident families with children with qualifying special education eligibility.   |
|   | <b>Lane Regional Inclusive Services</b>                | LESD Regional Inclusive Services works in collaboration with Local School Districts, Early Intervention, Early Childhood Special Education (EI/ECSE) programs, Families, and Community Agencies to provide specialized educational support for children with low incidence disability eligibility, including Autism Spectrum Disorder (ASD), Orthopedic Impairments (OI), Traumatic Brain Injury (TBI), Visual Impairments (VI), Deaf/Hard of Hearing (DHH), and DeafBlind (DB). This grant also supports audiology referrals and a Hearing Assistive Technology Equipment Lending Library. |
|   | <b>State Hospital</b>                                  | The Oregon State Hospital Education Program offers opportunities for 18 to 21-year-olds to continue their education while in the hospital setting.  |
|   | <b>Juvenile Detention Education Program</b>            | The Juvenile Detention Education Program (JDEP), funded by the Oregon Department of Education, provides educational and re-entry transitional services to students housed overnight in county juvenile detention facilities.  |
|   | <b>Regional Technical Assistance Program</b>           | Lane ESD provides local-level options for professional development and technical assistance within the general supervision areas (special education and federal title programs).  |
| <b>School Improvement Services</b>              | <b>Western Regional Education Network</b>              | The Western Regional Educator Network (WREN) encompasses the 28 school districts in Lane ESD and Linn-Benton-Lincoln ESD. It is an educator-led, improvement-focused network that elevates teachers' voices, emphasizes the Lane ESD Equity Lens to interrupt historical patterns of inequities, and supports educators in creating more inclusive and empowering school cultures. Professional development, coaching, and consultation are provided.   |

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|  | <b>Teacher Pathways*</b>                         | This Grow Your Own (GYO) grant funded program works to diversify the K-12 education workforce in Lane County by recruitment, selection, clinical practice, hiring placement, and induction support for pre-service teachers centered on building culturally responsive affinity groups. |
|  | <b>Social Emotional Learning*</b>                | Professional development, coaching, and consultation are provided to component districts to meet their goals of authentic implementation of Oregon's Transformation Social Emotional Learning (TSEL) standards,   |
|  | <b>School Safety and Prevention*</b>             | Technical expertise, training, and system development is provided to districts in responding to threats of violence and suicide. Our SSPS is the lead responder and coordinator of the Tragedy Response Team.   |
|  | <b>Student Voice*</b>                            | Professional development, coaching, and consultation are provided to implement ongoing student voice and engagement for district/school strategic planning and continuous improvement.  |
|  | <b>LGBTQ2SIA+ Student Success</b>                | This grant funds technical assistance, professional development, curriculum development, and resources, to ensure focal LGBTQ2SIA+ students and their families are safe, feel a sense of belonging, and are supported to achieve at high levels across all Lane County districts.       |
|  | <b>Latinx Student Success</b>                    | This grant funds technical assistance, professional development, curriculum development, and resources to ensure focal LatinX Students are safe, feel a sense of belonging, and are supported to achieve at high levels across all Lane County districts.                               |
|  | <b>Native Youth Wellness*</b>                    | This grant funds the Native Youth Wellness program (NYW). NYW provides professional development on Tribal History/Shared History and TSEL, culture nights, student affinity groups, coaching on tribal education programs, equity, and culturally sustaining pedagogy.                  |
|  | <b>Advanced Manufacturing &amp; Construction</b> | This grant supports a regional advisory committee and industry connections to strengthen the quality of CTE Programs of Study. This grant also sponsors the Construction Utility Career Day.  |
|  | <b>Behavioral Health Career Pathways</b>         | This grant provides curriculum, training, and work-based experiences focused on mental and behavioral health pathways between districts and industry partners via Lane Career Academy. Prioritizes rural and underserved communities.   |
|  | <b>Team Oregon Build</b>                         | Professional development and technical assistance is provided on hands-on construction projects. The project provides pathways for career development while addressing the urgent need for safe and sustainable housing.  |

|  |   |   |
|--|---|---|
|  | <b>Healthcare Workforce Development</b>         | Coordinate scholarship and training support to remove cost barriers for students to participate in Behavioral Health and Emergency Services pathways within Lane Career Academy.  |
|  | <b>LaneSTEM*</b>                                | Lane ESD supports Science, Technology, Engineering, and Math (STEM) education in partnership with LaneSTEM through workshops, school site consultation, classroom coaching, and grant partnerships.   |
|  | <b>Early Literacy*</b>                          | Lane ESD supports district implementation of their Early Literacy plans by coordinating professional development via Oregon Department of Education contractors and community partners.   |
|  | <b>Administrative Burden Reduction*</b>         | Technical assistance completing state and federal required reporting, grant applications, and data collections. The focus is primarily on small/rural districts, but Integrated Guidance technical assistance is provided for all component districts.  |
|  | <b>21st Century Community Learning Centers*</b> | Crow-Applegate-Lorane, McKenzie, Mapleton, and Siuslaw are in a consortium for the 21st Century Community Learning Centers (CCLC) grant. Lane ESD provides oversight and technical assistance on the completion of grant requirements.  |
|  | <b>English Language Development*</b>            | English Language Development (ELD) services include technical assistance relating to curriculum, instruction, assessment, and educational learning platforms. Train general education teachers to learn how to integrate the English Language Proficiency (ELP) standards into their regular curriculum.                                      |
|  | <b>Migrant Education</b>                        | Lane ESD coordinates a regional Migrant Education Program (MEP) consortium serving Lane and Douglas counties, including 29 school districts. MEP provides supplemental instruction, community outreach, and parent involvement for eligible MEP students, including summer school, graduation, and preschool services for students ages 3-21. |
|  | <b>EA/IA Professional Development*</b>          | Lane ESD contracts with Cultivate at the University of Oregon to provide professional development modules for Education / Instructional Assistants.   |
|  | <b>Portrait of a Graduate*</b>                  | Lane ESD contracts with Cosgrave and Swanson to consult rural districts on developing and implementing Portrait of a Graduate.  |

*\* Services provided to support districts in making progress toward the goals of the Student Success Act (see page 11).*

## Appendix - Links to Other Information

### Student Success Act Comprehensive Support Plan

Lane ESD's Student Success Act Comprehensive Support Plan is provided to assist districts with developing and implementing their Integrated Plans for the implementation of the Student Success Act. ***Services are detailed throughout this Local Service Plan and indicated with an (\*)***. You can view the 2024 - 2025 outcomes and strategies that guide the services in this local service plan here. (add link)

**Lane ESD Budget and Financial Reports** - Lane ESD's annually adopted budgets and audit reports can be found on the Lane ESD website at <https://lesd.k12.or.us/administration/business-services>.

**Lane ESD Equity Lens** - Lane ESD's Vision, Mission, and Purpose are at the center of all decisions made within the agency in service of our county. We employ our Equity Lens and adapt our Equity Tools to meet the needs of the decision at hand by including multiple perspectives, determining the problem to be solved, evaluating potential positive and negative impacts on our students, families, and districts, examining resources available, and at all times orient ourselves toward justice centered engagement while operating in a fiscally responsible and responsive manner. See more at <https://lesd.k12.or.us/strategic-plan>.

**Lane ESD Contact Information** - For questions, please contact [supt-office@lesd.k12.or.us](mailto:supt-office@lesd.k12.or.us)



# **SIUSLAW SCHOOL DISTRICT 97J**

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|  |                          |
|--|--------------------------|
| Subject: Policy GCBDA/GDBDA and Administrative Rule GCBDA/GDBDA-AR(1) - Family and Medical Leave | Item No: 010825-6.2      |
|  | Attachment: Yes          |
| Reason: Review – First Reading   | From: Andrew Grzeskowiak |
|  | Date: January 8, 2025    |

## **Background:**

With recent updates to state law, language in the policy is being standardized to read as 'paid family medical leave insurance' that could be used to supplement sick leave of the employee. New qualifications for family leave, medical leave and safe leave are delineated. In this policy, family leave and medical leave are distinct types of leave, when previously it was simply 'family medical leave' without distinction. In general, paid family medical leave insurance can be used for family leave, medical leave and safe leave.

## **Recommendation:**

The Administration recommends that the Board of Directors approve the updates to Policy GCBDA/GDBDA and Administrative Rule GCBDA/GDBDA-AR(1) - Family and Medical Leave

## **Resolution #010825-6.2 Policy GCBDA/GDBDA and Administrative Rule GCBDA/GDBDA-AR(1) - Family and Medical Leave :**

Be it Resolved that the Siuslaw School District Board adopts Policy GCBDA/GDBDA and Administrative Rule GCBDA/GDBDA-AR(1) - Family and Medical Leave as presented.

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Board Chair, Brian Lacouture

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Andrew Grzeskowiak, Superintendent

# ~~OSBA Model Sample Policy~~ Siuslaw School District 97J

Code: GCBDA/GDBDA

Adopted: 1/8/2025

For the Policy Committee – January 2025 – This replaces current policy GCBDA, last revised 2/12/14  
This is now *Family and Medical Leave*, as opposed to simply *Family Leave*

## **Family and Medical Leave \***

(Version 1)

{ The law does not require districts to have a board-adopted policy, but the district is required to follow the law; having policy and an administrative regulation in place can assist with compliance. **This policy is intended for districts with 50 or more employees as counted in accordance with ORS 659A.153.** If the district has between 25 and 50 employees, the district should use version 2 of GCBDA/GDBDA – Family Leave \*. If the district does not have 25 employees, the district should not adopt this policy. }

When applicable, the district will comply with the provisions of the Family and Medical Leave Act (FMLA){<sup>1</sup>}, the Oregon Family Leave Act (OFLA){<sup>2</sup>}, the Oregon Military Family Leave Act (OMFLA), Paid Family and Medical Leave Insurance (PFMLI) and other applicable provisions of state and federal law, Board policies and collective bargaining agreements regarding family medical leave.

In order for an employee to be eligible for the benefits under FMLA, the employee must have been employed by the district for at least 12 months, have worked at least 1,250 hours during the past 12-month period and worked at a worksite that employs 50 or more district employees within 75 miles of the worksite.

Generally, in order for an employee to be eligible for the benefits under OFLA, the employee must work an average of 25 hours or more per week during the 180 calendar days immediately prior to the first day of the start of the requested leave. ~~For parental leave purposes, an employee becomes eligible upon completing at least 180 calendar days immediately preceding the date on which the parental leave begins; there is no minimum average number of hours worked per week.~~ Special requirements apply during public health emergencies.

OMFLA applies to employees who work an average of at least 20 hours per week; there is no minimum number of days worked when determining an employee's eligibility for OMFLA.

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<sup>1</sup> { Generally, FMLA applies only to entities with 50 or more employees, however, FMLA applies to all public elementary and secondary educational institutions. See 29 CFR 825.600(b). The rule regarding individual employee eligibility does apply: an employee is only eligible if the employee "is employed at a worksite where 50 or more employees are employed by the employer within 75 miles of that worksite." See 29 CFR 825.110(a)(3). Consequently, FMLA applies to districts with fewer than 50 employees, but individual employees will not be eligible to receive benefits. }

<sup>2</sup> { OFLA applies to employers with 25 or more employees in Oregon (ORS 659A.153) and OMFLA applies to all public-sector employers in Oregon. (ORS 659A.090(2)) (Oregon BOLI Leave Laws – 2023 Edition) }

PFMLI is generally available to district employees who have earned \$1,000 in subject wages or taxable income during the alternate or base years<sup>3</sup>, contributed to the PFMLI fund in the alternate or base years and are otherwise eligible.<sup>4</sup> PFMLI can be taken for family leave, medical leave or safe leave.<sup>5</sup>

~~Federal and state leave entitlements generally run concurrently.~~ Leave taken under OFLA is in addition to leave taken under PFMLI and cannot be taken concurrently; however, OFLA leave or PFMLI may run concurrently with leave available under ORS 653.601 - 653.661, FMLA, and other types of leave if provided by the district. Any leave taken under PFMLI must be taken concurrently with any leave taken under FMLA when for the same purpose.

The superintendent [~~or designee~~] will develop administrative regulations as necessary for the implementation of the provisions of both federal and state law.

END OF POLICY

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**Legal Reference(s):**

|                              |                              |   |
|------------------------------|------------------------------|---|
| <a href="#">ORS 332.507</a>  | <a href="#">ORS 659A.090</a> | <a href="#">ORS 659A.099</a>  |
| <a href="#">ORS 657B.010</a> | <a href="#">ORS 659A.093</a> | <a href="#">ORS 659A.150 - 659A.186</a>                               |
| <a href="#">ORS 657B.025</a> | <a href="#">ORS 659A.096</a> | <a href="#">OAR 839-009-<del>0200</del>0210 - <del>0320</del>0460</a> |

~~Americans with Disabilities Act, 42 U.S.C. §§ 12101-12213; 29 C.F.R. Part 1630 (2017); 28 C.F.R. Part 35 (2017).~~  
Family and Medical Leave Act, 29 U.S.C. §§ 2601-2654; 5 U.S.C. §§ 6381-6387 (~~2012~~2018); Family and Medical Leave Act, 29 C.F.R. Part 825 (~~2017~~2023).  
Americans with Disabilities Act, 42 U.S.C. §§ 12101-12133 (2018); 29 C.F.R. Part 1630 (~~2019~~2023); 28 C.F.R. Part 35 (~~2019~~2023).  
Escriba v. Foster Poultry Farms, Inc. 743 F.3d 1236 (9<sup>th</sup> Cir. 2014).  
~~Senate Bill 999 (2023).~~  
Senate Bill 1515 (2024).

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<sup>3</sup> The wages are not required to have been earned for work in the district.

<sup>4</sup> See OAR 471-070-1010 for additional information.

<sup>5</sup> Time to effectuate the legal process for the placement of a child in foster care or a child being adopted qualifies for PFMLI starting January 1, 2025. Until then, leave is available through OFLA. {See SB 1515 (2024) Sections 4, 13, 21 and 25.}



# Siuslaw School District 97J

Code: GCBDA/GDBDA-AR(1)

Revised/Reviewed: 1/8/2025

*For the Policy Committee – January 2025 – replacing current administrative rule, last updated 11/15/23  
Family and Medical Leave, previously, simply Family Leave*

## **Family and Medical Leave \***

(Version 1)

{ The law does not require districts to have this information in an administrative regulation (AR), but the district is required to follow the law; having an AR in place can assist with compliance. **This AR is intended for districts with 50 or more employees.** If the district has between 25 and 50 employees, use version 2 (Oregon Family Leave Act (OFLA)) of GCBDA/GDBDA-AR(1) - Family Leave \*. If the district does not have 25 employees, the district should not use this AR. }

### **Employee Eligibility**

FMLA benefits are available to employees who have been employed by the district for at least 12 months, have worked at least 1,250 hours during the past 12-month period and work at a worksite that employs 50 district employees within 75 miles of the worksite.

An employee who has previously qualified for and has taken some portion of FMLA leave may request additional FMLA leave within the same leave year. In such instances, the employee may not need to requalify as an eligible employee.

Generally, in order for an employee to be eligible for the benefits under OFLA, the employee must work an average of 25 hours or more per week during the 180 calendar days<sup>1</sup> immediately prior to the first day of the start of the requested leave.<sup>2</sup>

An employee is eligible to take leave for any purposes of OFLA during a period of time covered by a public health emergency except:

1. An employee who has worked for the district for fewer than 30 days immediately before the date on which the family leave would commence; or
2. An employee who has worked for the district for an average of fewer than 25 hours per week in the 30 days immediately before the date on which the family leave would commence.

An employee of the district is eligible to take leave for purposes of OFLA if the employee:

1. Separates from employment with the district, irrespective of any reason:
  - a. Is eligible to take leave OFLA at the time the employee separates; and
  - b. Is reemployed by the district within 180 days of separation from employment; or

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<sup>1</sup> Thirty days during a declared public health emergency.

<sup>2</sup> The requirements of OFLA do not apply to any employer offering eligible employees a nondiscriminatory cafeteria plan, as defined by section 125 of the Internal Revenue Code of 1986, which provides as one of its options employee leave at least as generous as the leave required by OFLA.

2. Is eligible to take OFLA leave:
  - a. At the beginning of a temporary cessation of scheduled hours of 180 days or less; and
  - b. Returns to work at the end of the temporary cessation of scheduled hours of 180 days or less.

Any OFLA leave taken by the employee within any one-year period continues to count against the length of time of OFLA leave the employee is entitled. The amount of time that an employee is deemed to have worked for the district prior to a break in service due to a separation from employment or a temporary cessation of scheduled hours shall be restored to the employee when the employee is reemployed by the district within 180 days of separation from employment or when the employee returns to work at the end of the temporary cessation of scheduled hours of 180 days or less.

When an employee requests OFLA leave, or when the district acquires knowledge that an employee's leave may be for a purpose that constitutes OFLA leave, the district will notify the employee of the employee's eligibility to take OFLA leave within five business days, absent extenuating circumstances. Whether an employee is an "eligible employee" as defined in OAR 839-009-0210 is determined, a notice must be provided, at the commencement of the first instance of each purpose for leave listed in OAR 839-009-0240 during the OFLA leave year. If an employee is an "eligible employee" as defined in OAR 839-009-0210 for the purpose listed in OAR 839-009-0240, the employee's eligibility for that purpose does not change during the applicable 12-month period. In addition:

1. An employee taking, in any order, some or all of 12 weeks of OFLA pregnancy disability leave and some or all of 12 weeks of OFLA leave for any other purpose, need not requalify each time the employee takes OFLA leave within the same leave year;
2. An employee who has taken 2 weeks of OFLA child placement leave need not requalify for up to an additional 12 weeks of leave within the same leave year when used for the purposes of OFLA sick child leave;
3. An employee unable to work because of a disabling compensable injury<sup>3</sup> need not requalify under OAR 839-009-0210 in order to use OFLA leave following a period the employee is off work due to the compensable injury.

In determining if an employee has been employed for the preceding 180 calendar days under OFLA, the district must consider days, paid or unpaid, an employee is maintained on payroll.

Leave under the Oregon Military Family Leave Act (OMFLA) applies to employees who work an average of at least 20 hours per week. There is no minimum number of days worked when determining employee eligibility for OMFLA.

In determining average workweek, under FMLA and OFLA, the employer must count the actual hours worked using the Fair Labor Standards Act (FLSA) guidelines.

### **Qualifying Reason**

Eligible employees may access FMLA leave entitlements for the following reasons:

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<sup>3</sup> As defined in ORS 656.005.

1. Serious health condition of the employee or the employee's covered family member. "Serious health condition" means an illness, injury, impairment or physical or mental condition that involves inpatient care<sup>4</sup> or continuing treatment by a health care provider<sup>5</sup>.
2. Parental leave<sup>6</sup> (separate from eligible leave as a result of a child's serious health condition):
  - a. Bonding with and caring for the employee's newborn child (within 12 months following birth);
  - b. Bonding with and caring for a newly adopted child or newly placed child in foster care<sup>{7}</sup> under the age of 18 (within 12 months of placement);
  - c. Caring for a newly adopted child or newly placed child in foster care 18 years of age or older who is incapable of self-care because of a mental or physical disability (within 12 months of placement);
  - d. Time to effectuate the legal process required for placement of a child in foster care or the adoption of a child.
3. Military caregiver leave: leave for the care for spouse, child or next-of-kin who is a covered servicemember with a serious injury or illness;
4. Qualifying exigency leave: leave arising out of deployment to a foreign country of the employee's spouse, child or parent who is a military member on active duty or call to covered active duty status.

Eligible employees may access OFLA leave entitlements for the following reasons:

1. Pregnancy disability leave: leave taken by an employee for their own disability related to pregnancy, including pregnancy termination or childbirth, whether the disability occurs before, during or after the birth of the child or for prenatal care, including fertility or infertility treatment.
2. Sick child leave: leave taken to care for an employee's child suffering from an illness, injury, or condition that requires home care. Under OFLA, sick child leave includes leave to care for an employee's child whose school or child care provider has been closed<sup>8</sup> in conjunction with a statewide public health emergency declared by a public health official.<sup>9</sup>

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<sup>4</sup> "Inpatient care" means an overnight stay in a hospital, hospice, or residential medical facility, including any period of incapacity or any subsequent treatment in connection with such inpatient care. See 29 CFR § 825.114.

<sup>5</sup> "Continuing treatment" includes incapacity and treatment, pregnancy or prenatal care, chronic conditions, permanent or long-term conditions, conditions requiring multiple treatments, and absences attributable to incapacity. See 29 CFR § 815.115.

<sup>6</sup> Parental leave must be taken in one continuous block of time within 12 months of the triggering event.

<sup>7</sup> {ORS 659A.159 uses the term "foster child." Districts can choose to use either "foster child" or "child in foster care" throughout this administrative regulation.}

<sup>8</sup> "Closure" (OAR 839-009-0210(5)) for the purpose of sick child leave during a statewide public health emergency declared by a public health official means a closure that is ongoing, intermittent, or recurring and restricts physical access to the child's school or child care provider as defined in OAR 839-009-0210(4).

<sup>9</sup> The district may request verification of the need for sick child leave under OFLA due to a closure during a statewide public health emergency. Verification may include:

1. The name of the child being cared for;
2. The name of the school or child care provider that has closed or become unavailable;
3. A statement from the employee that no other family member of the child is willing and able to care for the child; and

3. Bereavement leave: leave taken to deal with the death of a covered family member and includes leave taken to attend the funeral or alternative to a funeral of the family member, to make arrangements necessitated by the death of the family member, or to grieve the death of the family member.<sup>10</sup> [When such leave is used for a family member who is related by affinity, the district requires an attestation form signed and submitted by the employee.]
4. ~~[Child placement leave: leave taken under OFLA before January 1, 2025, to effectuate the legal process required for placement of a foster child or the adoption of a child.]~~
5. [Leave previously protected by OFLA<sup>11</sup>: 1) leave to which an eligible employee was entitled under ORS 659A.150 - ORS 659A.186 on June 30, 2024; and 2) leave to which an eligible employee would not be entitled under ORS 659A.150 - ORS 659A.186 on July 1, 2024 and may now be entitled leave under Paid Family Medical Leave (ORS 657B).]

Eligible employees may also access OMFLA under OFLA for the purpose of spending time with a spouse or domestic partner who is in the military and has been notified of an impending call or order to active duty, or who has been deployed during a period of military conflict.

## Definitions

1. Family member:
  - a. For the purposes of FMLA, “family member” means:
    - (1) Spouse<sup>12</sup>;
    - (2) Parent<sup>13</sup>;
    - (3) Child; or
    - (4) Persons who are “in loco parentis.”
  - b. For the purposes of OFLA, “family member” means an eligible employee’s:
    - (1) Spouse or domestic partner;
    - (2) Child or the child’s spouse or domestic partner;
    - (3) Parent or the parent’s spouse or domestic partner;
    - (4) Sibling or stepsibling, or the sibling’s or stepsibling’s spouse or domestic partner;
    - (5) Grandparent or the grandparent’s spouse or domestic partner;
    - (6) Grandchild or the grandchild’s spouse or domestic partner; or

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4. With the care of a child older than 14, a statement that special circumstances exist requiring the employee to provide care to the child during daylight hours.

<sup>10</sup> Bereavement leave under OFLA must be completed within 60 days of the date the employee received notice of the death. The notice of the death of a family member may be by any means and from any source.

<sup>11</sup> OAR 839-009-0215. OFLA: Leave Previously Protected by OFLA.

<sup>12</sup> “Spouse” means individuals in a marriage, including “common law” marriage and same-sex marriage.

<sup>13</sup> “Parent” means a biological, adoptive, step or foster parent, or any other individual who stood “in loco parentis” to the employee when the employee was a child as defined herein. This does not include parents “in law.”

- (7) Any individual related by blood or affinity whose close association with an eligible employee is the equivalent of a family relationship.<sup>14</sup>

2. Child:

- a. For the purposes of FMLA, “child” means the eligible employee’s biological or adopted child, a child the employee is fostering, a stepchild, a legal ward or a child of a person standing “in loco parentis”, who is either under the age of 18, or who is 18 years of age or older and who is incapable of self-care because of a physical or mental disability.
- b. For the purposes of Military Caregiver Leave and Qualifying Exigency Leave under FMLA, “child” means the employee’s child on covered active duty regardless of that child’s age.
- c. For the purposes of OFLA, “child” means the eligible employee’s biological or adopted child, a child the employee is fostering, a stepchild, the child of the employee’s spouse or domestic partner, or a child with whom the employee is or was in a relationship of “in loco parentis.”
- d. For the purposes of child placement leave and sick child leave only under OFLA, the child must be under the age of 18 or an adult dependent child substantially limited by a physical or mental impairment.

3. In loco parentis:

- a. For the purposes of FMLA, “in loco parentis” means persons with day-to-day responsibility to care for or financially support a child, or, in the case of an employee, who had such responsibility for the employee when the employee was a child. A biological or legal relationship is not necessary.
- b. For the purposes of OFLA, “in loco parentis” means person in the place of the parent, having financial or day-to-day responsibility for the care of a child. A legal or biological relationship is not required.

4. Next of kin:

For the purposes of FMLA , “next of kin” means the nearest blood relative other than the covered servicemember’s spouse, parent or child in the following order of priority (unless otherwise designated in writing by the servicemember):

- a. Blood relatives who have been granted legal custody of the covered servicemember by court decree or statutory provisions;
- b. Siblings;
- c. Grandparents;
- d. Siblings of parents and their spouses; and

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<sup>14</sup> “Affinity” means a relationship for which there is a significant personal bond that, when examined under the totality of the circumstances, is like a family relationship. This bond may be demonstrated by, but is not limited to the following factors, with no single factor being determinative:

1. Shared personal financial responsibility, including shared leases, common ownership of real or personal property, joint liability for bills or beneficiary designations;
2. Emergency contact designation of the employee by the other individual in the relationship or the emergency contact designation of the other individual in the relationship by the employee;
3. The expectation to provide care because of the relationship or the prior provision of care;
4. Cohabitation and its duration and purpose;
5. Geographic proximity; and
6. Any other factor that demonstrates the existence of a family-like relationship.

e. First cousins.

5. Covered servicemembers:

For the purposes of FMLA, “covered servicemember” means a current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list for a serious injury or illness; or a covered veteran who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness.

6. Covered veteran:

For the purposes of FMLA, “covered veteran” means an individual who was:

- a. A member of the Armed Forces (including a member of the National Guard or Reserves);
- b. Discharged or released under conditions other than dishonorable; and
- c. Discharged within the five-year period prior to the first date the eligible employee takes FMLA leave to care for the covered veteran.

7. Public health emergency:

For OFLA a “public health emergency” means;

- a. A public health emergency declared under ORS 433.441.
- b. An emergency declared under ORS 401.165 if related to a public health emergency as defined in ORS 433.442.

## Leave Period

For the purposes of calculating an employee’s leave period for FMLA, the district will use ~~[the calendar year] [any fixed 12-month “leave year”]~~ **[the 12-month period measured forward from the date the employee’s leave begins]** ~~[a “rolling” 12-month period measured backward from the date the employee uses any FMLA leave].~~

For the purposes of calculating an employee’s leave period for OFLA, the district will use a period of 52 consecutive weeks beginning on the Sunday immediately preceding the date on which family leave commences.

The methods for calculating the leave period for FMLA or OFLA leave entitlement shall be used for all employees.

The leave period for the purposes of Military Caregiver Leave under FMLA shall be dependent on the start of any such leave regardless of the district’s designated leave period described above.

## Leave Duration

For the purposes of FMLA, an eligible employee is generally entitled to a total of 12 weeks of qualified leave during the district’s designated leave period (12-month period)<sup>15</sup>. Spouses who work for the district

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<sup>15</sup> An eligible employee taking Military Caregiver Leave under FMLA is entitled to up to 26 weeks of leave in the 12-month period beginning with the first day of such leave and regardless of any FMLA leave taken previously during the district’s leave  
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and are eligible for FMLA leave may be limited to a combined total of 12 weeks of FMLA leave during the district's designated leave period when the purpose of the leave is for:

1. Birth of a child or to care for a child after birth;
2. Placement of an adopted child or child in foster care, the care for an adopted child or child in foster care after placement; or
3. Care of the employee's parent with a serious medical condition.

Except in specific and unique instances, all qualified leave under FMLA counts toward an employee's leave entitlement within the designated leave period.

For the purposes of OFLA, an eligible employee is generally entitled to a total of up to 12 weeks of OFLA leave, for sick child leave and bereavement leave, during the designated leave period. An eligible employee is entitled to a total of two weeks of bereavement leave upon the death of each family member of the employee within a leave year, except that the eligible employee may not take more than four weeks of bereavement leave within a leave year.

An employee may also be entitled to take a total of 12 weeks of OFLA pregnancy disability leave within the same leave year.

Under OFLA, the employee may use all or part of the 12 weeks of sick child or bereavement leave and all or part of the 12 weeks of pregnancy disability leave in any order.

~~[In addition to the 24 weeks of possible OFLA leave identified above, an eligible employee is entitled to a total of two weeks of child placement leave within an OFLA leave year until January 1, 2025. The adoption or foster placement of multiple children at one time entitles the employee to take only one two-week period of child placement leave.]~~

Unlike FMLA, OFLA does not combine the leave entitlement when two or more family members work for the district. Under OFLA, family members who work for the district may be restricted from taking concurrent OFLA qualified leave.<sup>16</sup>

For the purposes of OMFLA, an eligible employee is entitled to 14 days of leave per call or order to active duty or notification of a leave from deployment. When an employee also meets the eligibility requirements of OFLA, the duration of the OMFLA leave counts toward that employee's leave entitlement during the designated leave period.

Qualified leave under FMLA and OFLA for an eligible employee will run concurrently during the designated leave period if for the same qualifying reason. Qualified leave under FMLA will run concurrently with other qualified leave covered under Paid Family and Medical Leave Insurance (PFMLI) and/or available sick leave under ORS 653.601 - 653.661 for eligible employees. Qualified leave under

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period. However, once the 12-month period begins for the purposes of Military Caregiver Leave under FMLA, any subsequent FMLA qualified leave, regardless of reason for such leave, will count toward the employee's 26-week entitlement under Military Caregiver Leave under FMLA.

<sup>16</sup> Exceptions to the ability to require family members to take OFLA qualified leave at different times are when one employee needs to care for a child for a purpose described in ORS 659A.159 (1)(a) while another employee is taking pregnancy disability leave or, one or more of the employees is taking bereavement leave.

OFLA may also run concurrently with leave taken under the sick leave law in ORS 653.601 - 653.661 if for the same qualifying reason, but not concurrent with PFMLI.

For the purpose of tracking the number of leave hours an eligible employee is entitled and/or has used during each week of the employee's leave, leave entitlement is calculated by multiplying the number of hours the eligible employee normally works per week by 12<sup>17</sup>. If an employee's schedule varies from week-to-week, a weekly average of the hours worked over the 12 months worked prior to the beginning of the leave period shall be used for calculating the employee's normal workweek<sup>18</sup>. If an employee takes intermittent or reduced work schedule leave, only the actual number of hours of leave taken may be counted toward the 12 weeks of leave to which the employee is entitled.

Holidays which occur within the week taken as FMLA may be counted against FMLA entitlement.<sup>19</sup> However, for leave taken in increments of less than one week, holidays in which employees generally are not expected to report do not count against the employees FMLA leave entitlement.

Under OFLA, days in which the district is not in operation, are not counted toward intermittent or reduced work schedule OFLA leave.

### **Intermittent Leave**

[With the exception of parental leave under FMLA which must be taken in one continuous block of time, a]An eligible employee is permitted under FMLA or OFLA to take intermittent leave for any qualifying reason.

Intermittent leave is taken in separate periods of time (i.e., hours, days, weeks, etc.), rather than in one continuous period of time, and/or requiring an altered or reduced work schedule. For OFLA this includes but is not limited to sick child leave taken requiring an altered or reduced work schedule because the intermittent or recurring closure of a child's school or child care provider due to a statewide public health emergency declared by a public health official.

When an exempt employee is eligible for both OFLA and FMLA leave, and the employee takes intermittent leave in blocks of less than one day, if done in accordance with 29 CFR § 825.206, the district may reduce the employee's salary for the part-day absence without the loss of the employee's exempt status in accordance with OAR 839-020-0004(32).

When OFLA leave is not covered by FMLA leave, and the employee takes intermittent leave in blocks of less than one day, the district will jeopardize the employee's exempt status if the district reduces the employee's salary for the part-day absence.

An employee's FMLA and/or OFLA intermittent leave time is determined by calculating the difference between the employee's normal work schedule and the number of hours the employee actually works

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<sup>17</sup> For example, an employee normally employed to work 30 hours per week is entitled to 12 times 30 hours, or a total of 360 hours of leave.

<sup>18</sup> For example, an employee working an average of 25 hours per week is entitled to 12 times 25 hours, or a total of 300 hours of leave.

<sup>19</sup> See 29 CFR § 825.200(h).



during the leave period. The result of such calculation is credited against the eligible employee's leave entitlement.

### **Alternate Work Assignment**

Under FMLA, the district may transfer an employee taking intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment to an alternate position for which the employee is qualified and which better accommodates an employee's recovery from a serious health condition, a serious health condition of a spouse, parent, son, or daughter, or a serious injury or illness of a covered servicemember. However, the district may not transfer the employee to an alternative position in order to discourage the employee from taking leave or otherwise work a hardship on the employee.

Under FMLA, when an employee who is taking leave intermittently or on a reduced leave schedule and has been transferred to an alternative position no longer needs to continue on leave and is able to return to full-time work, the employee will be placed in the same or equivalent job as the job they left when the leave commenced. An employee may not be required to take more leave than necessary to address the circumstance that precipitated the need for leave.

Under OFLA, the district may transfer an employee on intermittent OFLA leave or reduced work schedule into an alternate position with the same or different duties to accommodate leave, provided:

1. The employee accepts the position voluntarily and without coercion;
2. The transfer is temporary, lasts no longer than necessary to accommodate the leave and has equivalent pay and benefits;
3. The transfer is compliant with any applicable collective bargaining agreement, as well as with state and federal law;
4. The transfer to an alternate position is used only when there is no other reasonable option available that would allow the employee to use intermittent leave or reduced work schedule; and
5. The transfer is not used to discourage the employee from taking leave or to create a hardship for the employee.

Under OFLA, an employee transferred to an alternate position for the purpose of a reduced work schedule must be returned to the employee's former position when the employee notifies the employer that the employee is ready to return to the former position at the end of the alternate duty leave.

The district may transfer an eligible employee to an alternate position that accommodates OFLA pregnancy disability leave provided:

1. The employee accepts the transfer position voluntarily and without coercion;
2. The transfer is temporary, lasts no longer than necessary and has equivalent pay and benefits;
3. The transfer is compliant with any applicable collective bargaining agreements, as well as with state and federal law;

4. The transfer is not used to discourage the employee from taking OFLA leave or to create a hardship for the employee.

Under OFLA, if an eligible employee is transferred to an alternative position and as a result the employee works fewer hours than the employee worked in the original position, the employee's OFLA leave time is determined by calculating the difference between the number of hours the employee worked in the original position and the number of hours the employee actually works in the alternative position.

An employee is not on OFLA leave if the employee has been transferred – as provided for in OAR 839-009-0245 (5) – to an alternate position for the purpose of alternate work duties that the employee is able to perform within the limitations of the employee's pregnancy disability, but not requiring a reduced workweek. An employee working in an alternate position retains the right to return to the employee's original position at any time during the employee's OFLA leave. This does not impair the right of an employee to a reasonable accommodation or the application of any other state or federal law.

### **Special Rules for School Employees**

For the purposes of FMLA, "instructional employee" means those whose principal function is to teach and instruct students in a class, a small group or an individual setting. Athletic coaches, driving instructors and special education assistants, such as interpreters<sup>20</sup> for the hearing impaired, are included in this definition. This definition does not include teacher assistants or aides who do not have as their principal job actual teaching or instructing, auxiliary personnel such as counselors, psychologists, curriculum specialists, cafeteria workers, maintenance workers or bus drivers.

FMLA leave that is taken for a period that ends with the school year and begins with the next semester is considered consecutive rather than intermittent. The period during the summer vacation when the employee would not have been required to report for duty is not counted against the employee's FMLA leave entitlement. In any such situation, the eligible instructional employee will receive any benefits during the break period that employees would normally receive if they had been working at the end of the school year.

#### **1. Foreseeable Intermittent Leave Exceeding 20 Percent of Working Days**

When the qualified leave is foreseeable, will encompass more than 20 percent of the eligible instructional employee's regular work schedule during the leave period, and the purpose of such leave is to care for a family member with a serious medical condition, for a covered servicemember or for the employee's own serious medical condition, the district may require the eligible instructional employee to choose either to:

- a. Take leave for a period or periods of a particular duration, not greater than the duration of the planned treatment; or
- b. Temporarily transfer to an available alternate position for which the employee is qualified, which has equivalent pay and benefits and which better accommodates recurring periods of leave than the employee's regular position.

If an instructional employee does not give required notice of foreseeable FMLA leave to be taken intermittently or on a reduced leave schedule, the district may require the employee to take leave of a

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<sup>20</sup> 29 CFR 825.600(c) uses "signers."

particular duration, or to transfer temporarily to an alternative position. Alternatively, the district may require the employee to delay the taking of leave until the notice provision is met.

## 2. Limitation on Leave Near the End of the Term<sup>21</sup>

When an eligible instructional employee requests leave near the end of the term, the district may require the following:

- a. When the qualified leave begins more than five weeks before the end of the term, the district may require the employee to continue taking leave until the end of the term if:
  - (1) The leave will last at least three weeks; and
  - (2) The employee would return to work during the three-week period before the end of the term.
- b. When the qualified leave begins during a five-week period before the end of the term and the purpose of such leave is parental leave, for the serious health condition of a family member or to care for a covered servicemember, the eligible instructional employee may be required by the district to remain on leave until the end of the term if:
  - (1) The leave will last more than two weeks; and
  - (2) The employee would return to work during the two-week period before the end of the term.
- c. When the qualified leave begins within three weeks of the end of the term and the purpose of such leave is parental leave, for the serious health condition of a family member or to care for a covered servicemember, the eligible instructional employee may be required to remain on leave until the end of the term if the length of the leave will last more than five working days.

If the district requires an eligible instructional employee to remain on leave until the end of the term as described above, additional leave required by the district until the end of the school term shall not count against the eligible instructional employee's leave entitlement.

For the purposes of OFLA leave, if an employee<sup>22</sup> begins a period of bereavement leave during the three-week period before the end of the term and the duration of the leave is greater than five working days, the district may require the employee continue on family leave until the end of the term.

### **Paid/Unpaid Leave**

FMLA and OFLA do not require the district to pay an eligible employee who is on a qualified leave. Paid Family and Medical Leave Insurance (PFMLI) leave taken via Paid Leave Oregon or an equivalent plan will run concurrently with FMLA and leave available under ORS 653.601 - 653.661 when taken for the same purpose. An employee may elect to use any available accrued paid leave including personal, sick or

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<sup>21</sup> "Academic term" means the school semester, which typically ends near the end of the calendar year and the end of spring each school year. In no case may a school have more than two academic terms or semesters each year for purposes of FMLA. 29 CFR § 825.602(b)

<sup>22</sup> Applies only to an employee who is employed principally in an instructional capacity by the district.

vacation leave during the leave period {<sup>23</sup>} [to the extent that the total combined amount of accrued paid leave and benefits received from PFMLI does not exceed an amount equal to the employee's full wage replacement during the period of leave]. [The total combined amount received by using accrued leave and PFMLI may exceed the employee's full wage replacement during the period of leave.] The district will notify the eligible employee when the requested leave has been designated as FMLA or OFLA leave and ask the employee about the use of available accrued paid leave.

Eligible employees taking OMFLA leave are entitled to use available accrued paid time off during the OMFLA leave period.

## **Benefits and Insurance**

When an eligible employee returns to work following a FMLA-, OFLA- or OMFLA-qualified leave, the employee must be reinstated to the same position the employee held when the leave commenced, or to an equivalent position with equivalent benefits, pay and other terms and conditions of employment.

During an OFLA qualified leave an eligible employee does not accrue seniority or other benefits that would have accrued while the employee was working, unless the terms of a collective bargaining agreement, other agreement or other district policy provide otherwise.<sup>24</sup> The eligible employee is also subject to layoff to the same extent similarly situated employees not taking OFLA leave are subject unless the terms of an applicable collective bargaining agreement, other agreement or the district's policies provide otherwise.

For the purposes of FMLA and OFLA, the district will continue to pay the employer portion of the eligible employee's group health insurance contribution (if applicable) during the qualified leave period. The eligible employee is required to pay the employee portion of any such group health insurance contribution as a condition of continued coverage.

For the purposes of FMLA qualified leave, the district's obligation to maintain the employee's group health insurance coverage will cease if the employee's contribution is remitted more than 30 calendar days late. The district will provide written notice that the premium payment is more than 30 calendar days late. Such notice will be provided within 15 calendar days before coverage is to cease.

For the purposes of OMFLA, the eligible employee is entitled to a continuation of benefits.

## **Fitness-for-Duty Verification**

For purposes of FMLA, prior to the reinstatement of an employee following a leave which was the result of the employee's own serious health condition, the district may require the employee to obtain and present a Fitness-for-Duty Certification. If the district is going to require a Fitness-for-Duty Certification upon return to work, the district must notify the employee of such requirement when the leave is designated as FMLA leave and that failure to provide the certification may result in a delay or denial of reinstatement. Any costs associated with obtaining the certification shall be borne by the employee.

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<sup>23</sup> {Select one of the two bracketed options based on district practice, i.e., keep the ending to this sentence OR delete this ending and keep the following bracketed sentence. See ORS 657B.030(2) (as amended by SB 1515 (2024) for additional guidance).}

<sup>24</sup> See also ORS 342.934(4)(d) in reduction force situations.

## Application

For purposes of FMLA, an eligible employee requesting FMLA leave shall provide at least 30 days' notice prior to the leave date if the leave is foreseeable. The notice shall be written and include the anticipated start date, duration and reasons for the requested leave. When appropriate, the eligible employee must make a reasonable effort to schedule treatment, including intermittent leave and reduced leave, so as not to unduly disrupt the operation of the district. An eligible employee able to give advance notice of the need to take FMLA leave must follow the district's known, reasonable and customary procedures for requesting any kind of leave.

For purposes of OFLA, an eligible employee shall provide at least [{<sup>25</sup>}30] days' written notice of the need for foreseeable leave before starting family leave. An employee may commence family leave without prior notice in the event of: an unexpected illness, injury or condition of a child of the employee that requires home care; the death of a family member; or an illness, injury or condition related to the employee's own pregnancy or childbirth that disables the employee from performing any available job duties offered by the district. If an employee commences leave without prior notice as allowed above, the employee must give oral notice<sup>26</sup> to the employer within 24 hours of the commencement of the leave and must provide the written notice within three days after returning to work. Failure of an employee to provide the required notice for leave may result in the district deducting up to three weeks from the employee's unused OFLA leave in that one-year leave period. The employee may be subject to disciplinary action for not following the district's notice procedures.

The district may request additional information<sup>27</sup> to determine the requested leave qualifies as FMLA or OFLA leave. The district may designate the employee as provisionally on FMLA or OFLA leave until sufficient information is received to properly make a determination. An eligible employee able to give advance notice of the need to take leave must follow the district's known, reasonable and customary procedures for requesting any kind of leave.

For the purposes of FMLA, if advance notice is not possible, an employee eligible for FMLA leave must provide notice as soon as practicable. "As soon as practicable," for the purpose of FMLA leave, means as soon as both possible and practical, taking into account all of the facts and circumstances in the individual case. In most situations, as soon as practicable will be within one business day of an employee becoming aware of the need. Failure of an employee to provide the required notice for FMLA leave may result in the district delaying the employee's leave up to 30 days after the notice is ultimately given.<sup>28</sup>

For the purposes of OFLA, if an eligible employee is taking leave in an unforeseeable situation, an employee must give oral or written notice<sup>29</sup> within 24 hours before or after commencement of the leave. In

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<sup>25</sup> {This number of days should align with the days provided in the leave request form.}

<sup>26</sup> Oral notice may be given by any other person on behalf of the employee taking the leave.

<sup>27</sup> Except in cases to verify OFLA bereavement leave unless the district requires the use of an attestation form for purposes of determining affinity.

<sup>28</sup> See 29 CFR § 825.304.

<sup>29</sup> Notice may be given by any other person on behalf of the employee taking the leave.

all cases, proper documentation must be submitted no later than three working days following the employee's return to work.

For purposes of OMFLA, an employee must provide the district with notice of the intention to take leave within five business days of receiving official notice of an impending call or order to active duty or of a leave from deployment.

## **Verification**

Under FMLA, the district may require an eligible employee to provide medical certification, when appropriate<sup>30</sup>, to support the stated reason for such leave. In most cases, the district will provide written notification to an employee of this requirement within five working days of the employee's request for leave. The employee is required to submit such medical certification no later than 15 calendar days after receipt of the district's notification that medical certification is required, unless not practicable. Any additional certifications, including second and third opinions, will be in accordance with applicable law.

Under OFLA, the district may require an eligible employee to provide medical verification, when appropriate<sup>31</sup>, to support the stated reason for qualifying OFLA leave. The district will provide written notification to an employee of this requirement and state the consequences for failure to provide the requested medical verification. If the employee gives advance written notice of foreseeable leave, the district may require the employee to provide medical verification for OFLA leave before the leave starts. If the employee begins unforeseeable OFLA leave without prior notice, the employee is required to submit such medical verification within 15 calendar days after receipt of the district's request for medical verification. The employee may be subject to disciplinary action for not providing the requested medical verification.

For the purposes of OFLA qualified leave, costs associated with obtaining the medical verification shall be borne by the district, or be paid as otherwise allowed by law. The district will not delay the use of qualifying OFLA leave when medical verification is not received before the commencement of unforeseeable leave. The district may not require an employee to obtain a second opinion.

Under OFLA, the district may request verification for the need for leave to care for a child who requires home care due to the closure of the child's school or child care provider as a result of a public health emergency. A request for verification may include a request for:

1. The name of the child requiring home care;
2. The name of the school or child care provider that is subject to the closure;
3. A statement from the employee that no other family member of the child is willing and able to care for the child; and
4. A statement that special circumstances exist that require the employee to provide home care for the child during the day, if the child is older than 14 years of age.

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<sup>30</sup> Medical verification is not allowed in every situation. Review current laws and guidance for more information.

<sup>31</sup> Medical verification is not allowed in every situation. Review current laws and guidance for more information. (OAR 839-009-0260)

## **Posted Notice**

The district will post the Bureau of Labor and Industries Family Leave notice in each building or worksite in an area that is accessible to and regularly frequented by employees.<sup>32</sup> The district will also post a notice explaining the provisions of FMLA and providing information concerning the procedures for filing complaints.<sup>33</sup>

## **Record Keeping**

The district will maintain all records as required by federal and state laws including dates leave is taken by employees, identified separately from other leave; hours/days of leave; copies of general and specific notices to employees, including Board policy(ies) and regulations; premium payments of employee health benefits while on leave and records of any disputes with employees regarding granting of leave.

Medical documentation will be maintained separately from personnel files as confidential medical records.

## **Federal vs. State Law**

Both federal and state law contain provisions for family and medical leave. Federal regulations state an employer must comply with all leave laws; that the federal law does not supersede any provision of state law that provides greater family or medical leave rights than those established pursuant to federal law; and if leave qualifies for FMLA and OFLA leave, the leave used counts against the employee's entitlement under both laws. State law requires that FMLA and OFLA or other state leave entitlements run concurrently when for the same purpose.

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<sup>32</sup> [https://www.oregon.gov/boli/employers/Documents/BOLI\\_Printable\\_FamilyMedLv.pdf](https://www.oregon.gov/boli/employers/Documents/BOLI_Printable_FamilyMedLv.pdf); electronic posting is not sufficient to satisfy this requirement, but may be used to supplement the physical posting.

<sup>33</sup> <https://www.dol.gov/sites/dolgov/files/WHD/legacy/files/fmlaen.pdf>; electronic posting is sufficient as long as it is posted prominently where it can be readily seen by employees and applicants for employees. The poster and the text must be large enough to be easily read and contain fully legible text.



# **SIUSLAW SCHOOL DISTRICT 97J**

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|   |                          |
|---|--------------------------|
| Subject: Policy GCBDC/GDBDC and Administrative Rule GCBDC/GDBDC- Domestic Violence and Safe Leave | Item No: 010825-6.3      |
|   | Attachment: Yes          |
| Reason: Review – First Reading  | From: Andrew Grzeskowiak |
|   | Date: January 8, 2025    |

## **Background:**

With recent updates to state law, language in the policy is being standardized to read as 'paid family medical leave insurance' that could be used to supplement sick leave of the employee. New qualifications for family leave, medical leave and safe leave are delineated. In general, domestic violence and safe leave are taken:

- To seek legal or law enforcement assistance or remedies to ensure the health and safety of the employee or the employee's minor child or dependent, including preparing for and participating in protective order proceedings or other civil or criminal legal proceedings related to domestic violence, harassment, sexual assault, bias, or stalking;
- To seek medical treatment for or to recover from injuries caused by domestic violence or sexual assault to, harassment or stalking of, or the commission of a bias crime against the eligible employee or the employee's minor child or dependent;
- To obtain, or to assist a minor child or dependent in obtaining counseling from a licensed mental health professional related to an experience of domestic violence, harassment, sexual assault, bias, or stalking;
- To obtain services from a victim services provider for the eligible employee or the eligible employee's minor child or dependent; or
- To relocate or take steps to secure an existing home to ensure health and safety of the eligible employee or the employee's minor child or dependent.

## **Recommendation:**

The Administration recommends that the Board of Directors approve the updates to Policy GCBDC/GDBDC and Administrative Rule GCBDC/GDBDC- Domestic Violence and Safe Leave.

## **Resolution #010825-6.3 Policy GCBDC/GDBDC and Administrative Rule GCBDC/GDBDC- Domestic Violence and Safe Leave:**

Be it Resolved that the Siuslaw School District Board adopts Policy GCBDC/GDBDC and Administrative Rule GCBDC/GDBDC- Domestic Violence and Safe Leave as presented.



# Siuslaw School District 97J

Code: GCBDC/GDBDC

Adopted: 11/14/18

*For the Policy Committee – December 2024 for the January 2025 board meeting*

## **Domestic Violence, Harassment, Sexual Assault, Bias, or Stalking Leave (Safe Leave) \***

{Applies to employers who employ six or more employees in Oregon and meet the definition of “covered employer.”}

### **Definitions**

1. ~~“Covered employer” means an employer who employs 6 or more individuals in the state of Oregon for each working day through each of 20 or more calendar workweeks in the year in which the eligible employee takes leave to address domestic violence, harassment, sexual assault or stalking, or in the year immediately preceding the year in which an eligible employee takes leave for domestic violence, harassment, sexual assault or stalking.~~
2. ~~“Eligible employee” means an employee who is a victim of domestic violence, harassment, sexual assault or stalking or is the parent or guardian of a minor child or dependent who is a victim of domestic violence, harassment, sexual assault or stalking.~~
3. ~~“Protective order” means an order authorized by Oregon Revised Statute (ORS) 30.866, 107.095(1)(c), 107.700–107.735, 124.005–124.040 or 163.730–163.750 or any other order that restrains an individual from contact with an eligible employee or the employee’s minor child or dependent.~~
4. ~~“Victim of domestic violence” means an individual who has been a victim of abuse as defined by ORS 107.705; or any other individual designated as a victim of domestic violence by rule adopted under ORS 659A.805.~~
5. ~~“Victim of harassment” means an individual against whom harassment has been committed as described in ORS 166.065 and any other individual designated as a victim of harassment by rule adopted under ORS 659A.805.~~
6. ~~“Victim of sexual assault” means an individual against whom a sexual offense has been committed as described in ORS 163.467 or 163.525; or any other individual designated as a victim of sexual assault by rule adopted under ORS 659A.805.~~
7. ~~“Victim of stalking” means an individual against whom stalking has been committed as described in ORS 163.732; or an individual designated as a victim of stalking by rule adopted under ORS 659A.805; or an individual who has obtained a court’s stalking protective order or a temporary court’s stalking protective order under ORS 30.866.~~
8. ~~“Victim services provider” means a prosecutor-based victim assistance program or a nonprofit program offering safety planning, counseling, support or advocacy related to domestic violence, harassment, sexual assault or stalking.~~

When applicable, the district will comply with the provisions of protected leave identified in ORS 659A.272 to address domestic violence, harassment, sexual assault, bias, or stalking.

A The district (covered employer<sup>1</sup>) shall allow an (eligible) employee<sup>2</sup> to take reasonable leave from employment for any of the following reasons:

1. To seek legal or law enforcement assistance or remedies to ensure the health and safety of the employee or the employee's minor child or dependent, including preparing for and participating in protective order proceedings or other civil or criminal legal proceedings related to domestic violence, harassment, sexual assault, bias, or stalking;
2. To seek medical treatment for or to recover from injuries caused by domestic violence or sexual assault to, ~~or~~ harassment or stalking of, or the commission of a bias crime against the eligible employee or the employee's minor child or dependent;
3. To obtain, or to assist a minor child or dependent in obtaining counseling from a licensed mental health professional related to an experience of domestic violence, harassment, sexual assault, bias, or stalking;
4. To obtain services from a victim services provider for the eligible employee or the eligible employee's minor child or dependent; or
5. To relocate<sup>3</sup> or take steps to secure an existing home to ensure health and safety of the eligible employee or the employee's minor child or dependent.

The district may limit the amount of leave, if the eligible employee's leave creates an undue hardship on the district.

The district shall not deny leave to an eligible employee or discharge, threaten to discharge, demote, suspend or in any manner discriminate or retaliate against an employee with regards to promotion, compensation or other terms, conditions or privileges of employment as a result of taking such leave because the employee makes inquiries about, applies for, or takes such leave.

The eligible employee shall give the district reasonable advanced notice of the employee's intention to take leave unless giving advance notice is not feasible.

The district may require the eligible employee to provide certification that:

1. The employee or employee's minor child or dependent is a victim of domestic violence, harassment, sexual assault, bias, or stalking; and

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<sup>1</sup> "Covered employer" means an employer who employs six or more individuals in the State of Oregon for each working day during each of 20 or more calendar workweeks in the year in which an eligible employee takes leave to address domestic violence, harassment, sexual assault, bias or stalking, or in the year immediately preceding the year in which an eligible employee takes leave to address domestic violence, harassment, sexual assault, bias or stalking.

<sup>2</sup> "Eligible employee" means an employee who is a victim of domestic violence, harassment, sexual assault, bias or stalking or is the parent or guardian of a minor child or dependent who is a victim of domestic violence, harassment, sexual assault, bias or stalking.

<sup>3</sup> "Relocate" is described in OAR 839-009-0345 (5).

2. The leave is taken for one of the identified purposes in this policy.

The eligible employee shall provide a certification within a reasonable time after receiving the district's request for the certification.

Sufficient certification to support a request for such leave includes:

1. A copy of a report from law enforcement indicating the eligible employee or the employee's minor child or dependent was a victim of domestic violence, harassment, sexual assault, bias, or stalking;
2. A copy of a protective order or other evidence from a court, administrative agency, or attorney that the eligible employee appeared in or ~~was~~ is preparing for a civil, or criminal ~~or~~ administrative proceeding related to domestic violence, harassment, sexual assault, bias, or stalking; or
3. Documentation from an attorney, law enforcement officer, health care professional, licensed mental professional or counselor, member of the clergy, employee of the Department of Justice division providing victim and survivor services or ~~a~~ victim services provider that the eligible employee, or the employee's minor child or dependent was undergoing treatment or counseling, obtaining services or relocating as a result of domestic violence, harassment, sexual assault, bias, or stalking.

All records and information kept by the district regarding the employee's leave under ORS 659A.270 - 659A.285, including the fact the employee has requested or ~~obtaining of~~ obtained such leave, ~~is~~ are confidential and may not be released without the express permission of the employee unless otherwise required by law. [This information will be kept in a file separate from the employee's personnel file.]

The employee may use any accrued paid leave, including ~~personal~~, sick leave, ~~or accrued~~ vacation leave or any other paid leave offered by the district. [The ~~employer~~ district may choose the order in which paid accrued leave is to be used when more than one type of paid leave is available, consistent with Board policies, ~~and/or~~ any applicable collective bargaining agreement or other agreement.]

## Definitions

1. "Protective order" means an order authorized by ORS 30.866, 107.095 (1)(c), 107.700 to 107.735, 124.005 to 124.040, 163.730 to 163.750 or 163.760 to 163.777 or any other order that restrains an individual from contact with an eligible employee or the employee's minor child or dependent.
2. "Victim of bias" means an individual who has been a victim of a bias crime as defined in ORS 147.380; or any other individual designated as a victim of bias by rule adopted under ORS 659A.805.
3. "Victim of domestic violence" means an individual who has been a victim of abuse, as defined in ORS 107.705; or any other individual designated as a victim of domestic violence by rule adopted under ORS 659A.805.
4. "Victim of harassment" means an individual against whom harassment has been committed as described in ORS 166.065; or any other individual designated as a victim of harassment by rule adopted under ORS 659A.805.

5. “Victim of sexual assault” means an individual against whom a sexual offense has been committed as described in ORS 163.305 to 163.467, 163.472 or 163.525; or any other individual designated as a victim of sexual assault by rule adopted under ORS 659A.805.
6. “Victim of stalking” means an individual against whom stalking has been committed as described in ORS 163.732; an individual designated as a victim of stalking by rule adopted under ORS 659A.805; or an individual who has obtained a court’s stalking protective order or a temporary court’s stalking protective order under ORS 30.866.
7. “Victim services provider” means a prosecutor-based victim assistance program or a nonprofit program offering safety planning, counseling, support or advocacy related to domestic violence, harassment, sexual assault, bias or stalking.

END OF POLICY

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**Legal Reference(s):**

[ORS 192.355\(38\)](#)

[ORS 659A.270 - 659A.290](#)

[OAR 839-009-0325 - 0365](#)

# Siuslaw School District 97J

Code: GCBDC/GDBDC-AR

Revised/Reviewed: 11/14/18

*For the Policy Committee – December 2024 for the January 2025 board meeting*

## Request for Domestic Violence, Harassment, Sexual Assault, Bias, or Stalking Leave

{Applies to employers who employ six or more employees in Oregon and meet the definition of “covered employer.”}

~~Where~~ When the need for ~~the~~ leave may be anticipated, a written request for leave under Oregon Revised Statute (ORS) 659A.270 - 659A.285 shall be made at least [30] days prior to the date the requested leave is to begin ~~unless giving advance notice is not feasible.~~ ~~In emergency situations~~ When it is not feasible, oral or written notice as soon as practical is allowed.

PLEASE PRINT

Name of ~~eligible~~ employee \_\_\_\_\_

Department \_\_\_\_\_ Title \_\_\_\_\_

Effective date of the leave \_\_\_\_\_

Status: ☐ Full-time ☐ Part-time ☐ Temporary Hire Date \_\_\_\_\_ ~~Length of Service~~ \_\_\_\_\_

The requested leave is for:

- ☐ Myself
- ☐ ~~My~~ A minor child or dependent for which I am a parent or guardian

The leave is for:

- ☐ To seek legal or law enforcement assistance or remedies to ensure the health and safety of the eligible employee or the eligible employee’s minor child or dependent, including preparing for and participating in protective order proceedings or other civil or criminal legal proceedings related to domestic violence, harassment, sexual assault, bias, or stalking.
- ☐ To seek medical treatment for or to recover from injuries caused by domestic violence or sexual assault to, harassment, ~~sexual assault~~ or stalking ~~for~~ of or the commission of a bias crime against the eligible employee or the eligible employee’s minor child or dependent.
- ☐ To obtain, or to assist the eligible employee’s minor child or dependent in obtaining counseling from a licensed mental health professional related to an experience of domestic violence, harassment, sexual assault, bias, or stalking.
- ☐ To obtain services from a victim services provider for the eligible employee or the eligible employee’s minor child or dependent.
- ☐ To relocate<sup>1</sup> or take steps to secure an existing home to ensure the health and safety of the eligible employee or the eligible employee’s minor child or dependent.

<sup>1</sup> “Relocate” is described in OAR 839-009-0345 (5).

The following has been provided ~~by the employee~~ to certify the need for the requested leave:

- ☐ A copy of a report from law enforcement indicating ~~that the eligible employee~~ myself or ~~the eligible employee's~~ my minor child or dependent ~~was~~ is a victim ~~or alleged victim~~ of domestic violence, harassment, sexual assault, bias, or stalking.
- ☐ A copy of a protective order or ~~any other order that restrains an individual from contact with an eligible employee or the employee's minor child or dependent,~~ other evidence from a court, administrative agency or attorney that ~~the eligible employee~~ I or my minor child or dependent appeared in or is preparing for a civil or criminal ~~administrative~~ proceeding related to domestic violence, harassment, sexual assault, bias, or stalking ~~or other order authorized by ORS 30.866, 107.095(1)(c), 107.700—107.735, 124.005—124.040 or 163.730—163.750.~~
- ☐ Documentation from an attorney, law enforcement officer, health care professional, licensed mental health professional or counselor, member of the clergy, employee of the Department of Justice division providing victim and survivor services or victim services provider ~~with or from whom the eligible employee or the eligible employee's~~ that I or my minor child or dependent is receiving services.

I understand ~~that I~~ may use accrued paid leave, including ~~personal and~~ sick leave, ~~or accrued~~ vacation leave or any other paid leave that is offered by the district [in the order specified by the [district] [applicable collective bargaining agreement]]. ~~[the district requires me to use any accrued sick leave, vacation, personal leave days or other paid time established by Board policy(ies) and/or collective bargaining agreement in the order specified by the district.]~~

If my request for a leave is approved, ~~it is my understanding~~ I understand that without an authorized extension when the need for an extension could be anticipated, I must report to duty on the first workday following the date my leave is scheduled to end. ~~I understand that failure to do so will constitute unequivocal notice of my intent not to return to work and the district may terminate my employment.~~ I understand if I am unable to return to work following the period of authorized leave, I will notify ~~my employer~~ the district as soon as practical and provide any required information which will allow ~~my employer~~ the district to determine my eligibility for an extension of leave.

I authorize the district to deduct from my paychecks or seek to recover any ~~employee contributions for health insurance premiums, life insurance or long term disability insurance~~ amounts paid for insurance coverage by the district on my behalf which remain unpaid after my leave, consistent with state law.

Signature of employee: \_\_\_\_\_ Date: \_\_\_\_\_



# **SIUSLAW SCHOOL DISTRICT 97J**

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|  |                          |
|--|--------------------------|
| Subject: Policy GCBDF/GDBDF and Administrative Rule GCBDF/GDBDF-AR- Family and Medical Leave Insurance | Item No: 010825-6.4      |
|  | Attachment: Yes          |
| Reason: Review – First Reading   | From: Andrew Grzeskowiak |
|  | Date: January 8, 2025    |

## **Background:**

With recent updates to state law, language in the policy is being standardized to read as 'paid family medical leave insurance' that could be used to supplement sick leave of the employee. New qualifications for family leave, medical leave and safe leave are delineated. Supplemental insurance for leave of the employee can be taken as either family leave or medical leave. In general, family leave may be taken:

- To care for and bond with a child during the first year after the child's birth or during the first year after the placement of the child through foster care or adoption; or
- To effectuate the legal process required for placement of a foster child or the adoption of a child; or
- To care for a family member with a serious health condition.

## **Recommendation:**

The Administration recommends that the Board of Directors approve the updates to Policy GCBDF/GDBDF and Administrative Rule GCBDF/GDBDF-AR -Family and Medical Leave Insurance.

## **Resolution #010825-6.4 Policy GCBDF/GDBDF and Administrative Rule GCBDF/GDBDF-AR- Family and Medical Leave Insurance:**

Be it Resolved that the Siuslaw School District Board adopts Policy GCBDF/GDBDF and Administrative Rule GCBDF/GDBDF-AR- Family and Medical Leave Insurance as presented.

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Board Chair, Brian Lacouture

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Andrew Grzeskowiak, Superintendent



# Siuslaw School District 97J

Code: GCBDF/GDBDF

Adopted: 1/9/2025

For the Policy Committee – January 2025 – last updated 8/23/23

*Paid Family Medical Leave Insurance is now Paid Family and Medical Leave Insurance*

## **Paid Family and Medical Leave Insurance \***

(Version 1)

{This version is designed for districts who are participating in Paid Leave Oregon. If the district is using an approved equivalent plan, the district should not adopt this version or use the accompanying administrative regulation: this includes simply replacing “the Department” with the entity administering an equivalent plan. If the district is using an equivalent plan, the district should work with the provider to communicate with staff. Many districts are bargaining aspects of this leave: policy language should not conflict with language in collective bargaining agreements. }

The district participates in Paid Family and Medical Leave Insurance (PFMLI) and Paid Leave Oregon (PLO)<sup>1</sup>. This includes submitting employee and employer contributions to the Oregon Employment Department (“Department”) as required by state law.<sup>2</sup> The district does not administer PFMLI or PLO Paid Leave Oregon. All applications and related questions should be directed to the Department.

### **Definitions**

1. “Family leave” means leave from work taken by a covered individual:
  - a. To care for and bond with a child during the first year after the child’s birth or during the first year after the placement of the child through foster care or adoption; or
  - b. <sup>3</sup>To effectuate the legal process required for placement of a foster child or the adoption of a child; or
  - c. To care for a family member with a serious health condition.
2. “Family leave” does not mean:
  - a. Leave described in Oregon Revised Statute (ORS) 659A.159(1)(da) (~~non-serious health condition of child or school or child care provider closure due to public health emergency~~) (i.e., care for a child who is suffering from an illness, injury or condition that requires home care or who requires home care due to closure of the child’s school or child care provider as a result of a public health emergency) except for leave to care for a child who requires home care due to an illness, injury or condition that is a serious health condition;
  - b. Leave described in ORS 659A.159(1)(eb) (death of a family member); or

<sup>1</sup> Paid Leave Oregon is the program developed by the Oregon Employment Department to administer Paid Family and Medical Leave Insurance.

<sup>2</sup> The overall contribution will be determined by the Department director, and is initially set at 1 percent (up to \$132,900). *{For districts with 25 or more employees:}* The employer contribution is 40 percent and the employee contribution is 60 percent of this amount. *{For districts with fewer than 25 employees:}* The employee contribution is 60 percent of this amount and the employer contribution is waived. The amount will be set annually by November 15. See ORS 657B.150. *{Districts may agree to pay the employee contribution, see any applicable employment agreements.}*

<sup>3</sup> This provision becomes effective on January 1, 2025.



- c. Leave authorized under ORS 659A.093 (leave for spouses of members of the military upon deployment or call to active duty).
3. “Family member” means:
    - a. The spouse of a covered individual;
    - b. A child ~~of a covered individual~~ or the child’s spouse or domestic partner;
    - c. A parent ~~of a covered individual~~ or the parent’s spouse or domestic partner;
    - d. A sibling or stepsibling of a covered individual or the sibling’s or stepsibling’s spouse or domestic partner;
    - e. A grandparent of a covered individual or the grandparent’s spouse or domestic partner;
    - f. A grandchild of a covered individual or the grandchild’s spouse or domestic partner;
    - g. The domestic partner of a covered individual; or
    - h. Any individual related by blood or affinity whose close association with a covered individual is the equivalent of a family relationship.
  4. “Medical leave” means leave from work taken by a covered individual that is made necessary by the individual’s own serious health condition.
  5. “Safe leave” means leave related to domestic violence, harassment, sexual assault, **bias, or** stalking and relocation for health and safety reasons as provided in ORS 659A.272.
  6. ~~“Serious health condition” means an illness, injury, impairment, or physical or mental condition of a claimant or their family member that:~~
    - a. ~~Requires inpatient care in a medical care facility such as, but not limited to, a hospital, hospice, or residential facility such as, but not limited to, a nursing home or inpatient substance abuse treatment center;~~
    - b. ~~In the medical judgment of the treating health care provider poses an imminent danger of death, or that is terminal in prognosis with a reasonable possibility of death in the near future;~~
    - c. ~~Requires constant or continuing care, including home care administered by a health care professional;~~
    - d. ~~Involves a period of incapacity. “Incapacity” is the inability to perform at least one essential job function, or to attend school or perform regular daily activities for more than three consecutive calendar days. A period of incapacity includes any subsequent required treatment or recovery period relating to the same condition. The incapacity must involve one of the following:~~
      - (1) ~~Two or more treatments by a health care provider; or~~
      - (2) ~~One treatment plus a regimen of continuing care.~~
    - e. ~~Results in a period of incapacity or treatment for a chronic serious health condition that requires periodic visits for treatment by a health care provider, continues over an extended period of time, and may cause episodic rather than a continuing period of incapacity, such as, but not limited to, asthma, diabetes, or epilepsy;~~
    - f. ~~Involves permanent or long-term incapacity due to a condition for which treatment may not be effective, such as, but not limited to, Alzheimer’s Disease, a severe stroke, or terminal stages of a disease. The employee or family member must be under the continuing care of a health care provider, but need not be receiving active treatment;~~

- g. ~~Involves multiple treatments for restorative surgery or for a condition such as, but not limited to, chemotherapy for cancer, physical therapy for arthritis, or dialysis for kidney disease that if not treated would likely result in incapacity of more than three calendar days;~~
- h. ~~Involves any period of disability due to pregnancy, childbirth, miscarriage or stillbirth, or period of absence for prenatal care; or~~
- i. ~~Involves any period of absence from work for the donation of a body part, organ, or tissue, including preoperative or diagnostic services, surgery, post-operative treatment, and recovery.~~

**7.6. “Serious health condition” means:**

- a. An illness, injury, impairment or physical or mental condition that requires inpatient care in a hospital, hospice, or residential medical care facility;
- b. An illness, disease or condition that in the medical judgement of the treating health care provider poses an imminent danger of death, is terminal in prognosis with a reasonable possibility of death in the near future, or requires constant care;
- c. Any period of disability due to pregnancy, or period of absence for prenatal care; or
- d. Any period of absence for the donation of a body part, organ or tissue, including preoperative or diagnostic services, surgery, post-operative treatment and recovery.

**Eligibility**

1. To be eligible for ~~PLO~~ Paid Leave Oregon benefits, an individual must:

- a. Be an employee of the district<sup>4</sup>;
- b. Earn at least \$1,000 in the base or alternate base year<sup>5</sup>;
- c. Contribute to ~~the PLO~~ Paid Leave Oregon in accordance with state law;
- d. Experience an event qualifying the employee for:
  - (1) Family leave;
  - (2) Medical leave; or
  - (3) Safe leave.
- e. Submit an application to Department;
- f. Have not exceeded maximum paid leave ~~for~~ in the active benefit year; and
- g. Have no current disqualifications<sup>6</sup>.

**Leave**

<sup>4</sup> PFMLI is a state-wide benefit, and not unique to the district. An eligible individual does not need to be an employee of the district in order to be eligible for PFMLI, but this policy only applies to employees of the district.

<sup>5</sup> Pay could come from another Oregon employer.

<sup>6</sup> Disqualifications may include eligibility for Workers’ Compensation or Unemployment or determination of a willful false statement or failure to report a material fact in order to obtain benefits. See OAR 471-070-1010(1)(h).

~~PLO~~ Paid Leave Oregon can be used for family leave, medical leave or safe leave. Up to 12 weeks of paid leave can be taken per benefit year.<sup>7</sup> Leave can be taken in one-day increments and can be consecutive or nonconsecutive.

Any family leave or medical leave taken under ~~PLO~~ Paid Leave Oregon must be taken concurrently with any leave taken by an eligible employee ~~under ORS 659A.150 – 659A.186 (OFLA)~~ or under the federal Family and Medical Leave Act of 1993 (P.L. 103-3, FMLA) for the same purposes. Leave taken under Paid Leave Oregon is in addition to, and may not be taken concurrently with, any leave taken pursuant to ORS 659A.150 - 659A.186 (Oregon Family Leave Act (OFLA)).

The district will maintain an employee's existing health benefits while the employee is using leave. The employee will be required to pay the employee's contribution to premiums.

END OF POLICY

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**Legal Reference(s):**

[ORS 657B](#)

[ORS 659A.162](#)

[OAR 471-070](#)

[Senate Bill 1515](#) (2024).

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<sup>7</sup> In some pregnancy-related situations (e.g., pregnancy, childbirth, or a related medical condition), employees may be able to take two additional weeks, for a total for 14 weeks per benefit year.

# Siuslaw School District 97J

Code: GCBDF/GDBDF-AR

Revised/Reviewed: 1/9/2025

For the Policy Committee – January 2025 – last updated November 2023

*Was previously Paid Family Medical Leave Insurance, now it is Paid Family and Medical Leave*

## **Paid Family and Medical Leave Insurance (PFMLI) \***

{This administrative regulation is for use only with Version 1 of policy GCBDF/GDBDF - Paid Family and Medical Leave Insurance and is not intended to be used with an equivalent plan. OSBA does not recommend simply replacing “Employment Department” with the name of the entity administering an equivalent plan.}

### **Application**

Employees may submit applications for Paid Leave Oregon ~~(PLO)~~<sup>1</sup> to the Oregon Employment Department (“Department”).<sup>2</sup> Applications may be submitted up to 30 days prior to the start of the leave and up to 30 days after the start of the leave.<sup>3</sup> The Department may require verification from the employee.<sup>4</sup> The Department will make all decisions regarding acceptance and denial of an application, including determining the amount of the benefit.<sup>5</sup> The district cannot accept, file, process or make decisions on applications.

An employee may appeal an approval or denial of claim, the amount of a weekly benefit or a disqualification from receipt of benefits to the Department in accordance with Oregon Revised Statute (ORS) 657B.410 and Oregon Administrative Rule (OAR) 471-070-8005.

### **Employee Notice to District**

If the leave is foreseeable<sup>6</sup>, the employee must provide the district with written notice<sup>7</sup> at least 30 calendar days prior to the leave.<sup>{ 8 }</sup> If the leave is not foreseeable<sup>9</sup> the employee must give oral notice to the district

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<sup>1</sup> “Paid Leave Oregon” means the Paid Family and Medical Leave Insurance program described in ORS 657B.

<sup>2</sup> For application requirements see Oregon Administrative Regulation (OAR) 471-070-1100. Applications can be submitted at <https://frances.oregon.gov/> to the Employment Department through the Paid Leave Oregon program.

<sup>3</sup> Exceptions may be granted when the applicant can demonstrate good cause for late submission.

<sup>4</sup> See verification requirements in OAR 471-070-1110 - OAR 471-070-1130.

<sup>5</sup> The benefit may be less than the employee’s salary. See ORS 657B.050.

<sup>6</sup> Examples of foreseeable leave include, but are not limited to, an expected birth, planned placement of a child, or a scheduled medical treatment for a serious health condition of the eligible employee or a family member of the eligible employee. See OAR 471-070-1310.

<sup>7</sup> Written notice includes, but it not limited to, handwritten or typed notices, and electronic communication such as text messages and email.

<sup>8</sup> {OAR 471-017-1310(6) states “An employer that requires eligible employees to provide a written notice before the eligible employee commences leave, must outline the requirements in the employer’s written policy and procedures.”}

<sup>9</sup> Leave circumstances that are not foreseeable include, but are not limited to, an unexpected serious health condition of the eligible employee or a family member of the eligible employee, a premature birth, an unexpected adoption, an unexpected foster placement by or with the eligible employee, or for safe leave.

within 24 hours of the start of the leave, and must provide written notice within 3 days after the start of leave.<sup>10</sup> The district requests as much advanced notice as possible.

The notice must include:

1. The employee's first and last name;
2. Type of leave;
3. Explanation of the need for leave; and
4. Anticipated timing and duration of leave, including if it is continuous or intermittent.

Notice need only be given one time, but the employee shall notify the district as soon as practicable if dates of scheduled leave change, are extended, or were initially unknown. This notice does not need to mention PFMLI or **PLO Paid Leave Oregon** to satisfy the notice requirements.<sup>{11}</sup> Notice may be provided by another party on behalf of the employee in accordance with state law.

Failure to comply with these notice requirements may result in a penalty imposed by the Department. The Department may reduce the amount of the benefit by 25 percent in accordance with OAR 471-070-1310(10).

### **Concurrent Use of District-Provided Paid Leave<sup>{12}</sup>**

~~The district {allows<sup>{13}</sup>} employees to use all or a portion of employer-provided paid leave in addition to receiving PLO benefits. {Example:~~

~~An employee applies and is approved for PLO for a personal serious medical condition, which also qualifies for OFLA leave. The Department determines that the rate of pay will be 75 percent of the employee's regular salary. The employee will be allowed to use available district provided paid leave (sick, vacation or otherwise) for days that PLO is received agreement or other agreement. Because of the overlap with OFLA leave, the employee will be able to choose how much other paid leave to use (which may result in the employee receiving more than 100 percent of their typical salary).}~~

<sup>10</sup> An eligible employee who takes safe leave shall give the employer reasonable advance notice of the individual's intention to take safe leave, unless giving the advance notice is not feasible. If other leave also applies ~~(OFLA, FMLA, etc.)~~, notice requirements for those types of leave may also apply.

<sup>11</sup> {A district requiring written notice must outline the requirements in policy and procedures. A copy of the written policy and procedure must be provided to all eligible employees at the time of hire and each time the policy and procedure changes and in the language that the employer typically uses to communicate with the employee.}

<sup>12</sup> {Consider any collective bargaining requirements prior to adopting this language.}

<sup>13</sup> ~~{See Oregon Bureau of Labor and Industries opinion letter, April 7, 2023. Because most PMFLI leave will also qualify for OFLA leave, OSBA recommends allowing the employee to use employer-provided paid leave for all PMFLI. A decision to not allow employees to use employer-paid leave could apply to situations eligible for PMFLI leave, but not OFLA leave.}~~

The employee will be allowed to use available district-provided paid leave (e.g., sick, vacation or otherwise) for days that Paid Leave Oregon is received {<sup>14</sup>}~~[to the extent that the total combined amount of accrued paid leave and benefits received by the employee does not exceed an amount equal to the employee's full wage replacement during the period of leave].~~ ~~[The total combined amount received by using accrued leave and Paid Leave Oregon may exceed the employee's full wage replacement during the period of leave.]~~ [\*The district will determine the particular order in which accrued leave is used when more than one type of accrued leave is available to the employee.]

Example: The Department determines that the rate of pay will be 75 percent of the employee's regular salary. The employee will be allowed to use available district-provided paid leave (sick, vacation or otherwise), subject to any applicable collective bargaining agreement or other agreement for days Paid Leave Oregon benefits are received. The employee ~~[may use such leave to the extent that the total combined amount of accrued paid leave and Paid Leave Oregon benefits received by the employee does not exceed an amount equal to the employee's full wage replacement during the period of leave]~~ ~~[will be able to choose how much other paid leave to use (which may result in the employee receiving more than 100 percent of their typical salary)].~~

## Return to Work

Upon completion of leave, the employee is entitled to return to the position held in the district prior to the leave, if that position still exists and if the employee had been employed in the district for 90 days prior to taking leave.<sup>15</sup> ~~[[For districts with 25 or more employees:] If the position no longer exists, the employee is entitled to a be restored to any available equivalent position equal to their previous position, with equal equivalent employment benefits, pay and other terms and conditions of employment.]~~ ~~[[For districts with fewer than 25 employees:] If the position no longer exists, the employee may be placed in a different position with similar job duties and benefits and pay equal to the previous position with the same employment benefits and pay.]~~

## Communications Between the District and the Department

Upon receipt of an application or update in information from a district employee for ~~PLO~~ Paid Leave Oregon, the Department will notify the district. The district may provide additional information to the Department within 10 days. This information may include, but is not limited to, information about the employee's notice to the district or verification of the employee's continued employment with the district. If the district does not report such information to the Department, the Department will proceed using available information. The district can provide additional information to the Department as it becomes available.

If the Department requests additional information from the district, the district will respond within 10 calendar days.

<sup>14</sup> {Select one of the two bracketed options based on district practice, i.e., keep the ending to this sentence OR delete this ending and keep the following bracketed sentence. See ORS 657B.030(2) (as amended by SB 1515 (2024) for additional guidance).}

<sup>15</sup> If the employee's leave also qualifies for ~~OFLA~~ FMLA protection, see also Board policy GCBDA/GDBDA ~~Family Medical Leave~~ and its accompanying administrative regulations.

Once the Department has issued a decision regarding an application submitted by an employee of the district, the Department will notify the district regarding the approval or denial and any applicable dates and periods of leave.

### **District Notice to Employees**

At the time of hire and each time the policy or procedure changes, the district must provide notice to employees. This notice must be in the language that the employer typically uses to communicate with employees and will include:

1. The right of an eligible employee to claim and receive family and medical leave insurance benefits;
2. The procedure for filing a claim for benefits;
3. That an eligible employee must provide notice to the district before the employee commences leave, and a description of the penalties for failure to comply with the notice requirements;
4. The right of an eligible employee to job protection and benefits continuation;
5. The right of an eligible employee to appeal a decision or determination made by the Department director;
6. That discrimination and retaliatory personnel actions against an employee for inquiring about the PFMLI or ~~PLO~~ Paid Leave Oregon program, giving notification of leave under the program, taking leave under the program or claiming PFMLI or ~~PLO~~ Paid Leave Oregon benefits are prohibited;
7. The right of an employee to bring a civil action or to file a complaint for violation of ORS 657B.060 or 657B.070; and
8. That any health information related to family leave, medical leave or safe leave provided to the district by an employee is confidential and may not be released without the permission of the employee unless state or federal law or a court order permits or requires disclosure.<sup>16</sup>

The district will display the Department's notice poster in an area that is accessible to and regularly frequented by employees in each building or worksite. The district will provide this notice poster to employees working remotely by hand delivery, regular mail or through an electronic delivery method at the time of hire or assignment to remote work.

### **District Filings**

The district will file the Oregon Quarterly Tax Report, the Oregon Employee Detail Report and any other reports required by law. If the district fails to submit required filings or report, or fails to pay all required contributions, the district may be penalized in accordance with OAR 471-070-8520.

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<sup>16</sup> Paid Leave Oregon has provided a model notice, <https://paidleave.oregon.gov/DocumentsForms/Paid-Leave-ModelNotice-Poster-EN.pdf>.

~~{For districts with fewer than 25 employees:}[The district may apply for an assistance grant.<sup>17</sup>}~~

## Employee Protections

No employee or prospective employee will be discriminated or retaliated against for inquiring about PFMLI or PLO Paid Leave Oregon, giving notification of leave under PLO Paid Leave Oregon, taking PLO such leave or claiming PLO such benefits. Eligible employees have a right to file a complaint and/or bring a civil action for violations of ORS 657B.060 or ORS 657B.070.

Any health information related to family leave, medical leave or safe leave provided to the district by an employee is confidential and may not be released without the permission of the employee unless state or federal law or a court order permits or requires disclosure.

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<sup>17</sup> See OAR 471-070-3705 - 3710 for eligibility requirements and application requirements.





# **SIUSLAW SCHOOL DISTRICT 97J**

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|                                       |                          |
|---------------------------------------|--------------------------|
| Subject: Policy GCBDD/GDBDD-Sick Time | Item No: 010825-6.5      |
|                                       | Attachment: Yes          |
| Reason: Review – First Reading        | From: Andrew Grzeskowiak |
|                                       | Date: January 8, 2025    |

## **Background:**

Sick Time is different from sick leave. Sick Time is accrued by substitute employees. Sick time is accumulated at a rate of 1 hour per every 30 hours of substitute work completed. In the event that a substitute employee is scheduled to cover for a regular employee, and they fall ill, sick time can be used to cover the planned work assignment and provide a partial salary for that substitute assignment.

## **Recommendation:**

The Administration recommends that the Board of Directors approve the updates to Policy GCBDD/GDBDD -Sick Time.

## **Resolution #010825-6.5 Policy GCBDD/GDBDD -Sick Time:**

Be it Resolved that the Siuslaw School District Board adopts Policy GCBDD/GDBDD -Sick Time as presented.

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Board Chair, Brian Lacouture

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Andrew Grzeskowiak, Superintendent

# Siuslaw School District 97J

Code: GCBDD/GDBDD

Adopted: 1/11/17

Revised: 1/8/25

*For the Policy Committee – December 2024 for the January 2025 board meeting*

## Sick Time \*

{The recommendation for highly recommended comes from the requirement for schools to implement a sick time policy (ORS 653.606) and provide notice to employees of sick time policies and procedures. Many districts bargain aspects of this leave; policy language should not conflict with language in collective bargaining agreements. }

“Employee” means an individual who ~~is employed by the district and who is paid on an hourly, stipend or salary basis, and for whom withholding is required under Oregon Revised Statute (ORS) 316.162–316.221~~ renders personal services at a fixed rate to the district if the district either pays or agrees to pay for personal services or permits the individual to perform personal services. The definition does not include volunteers or independent contractors.

Employees qualify to begin earning and accruing sick time on the first day of employment with the district and are eligible to use sick time beginning on the 91st calendar day of employment with the district and may use sick time as it is accrued.

[~~A~~The district employs ~~ings~~ {<sup>1</sup>} 10 or more employees and therefore shall allow an eligible employee to access up to 40 hours of paid sick time per year. [Paid sick time shall accrue at the rate of at least one hour of paid sick time for every 30 hours the employee works, or 1-1/3 hours for every 40 hours the employee works.] [Paid sick time of 40 hours shall be {<sup>2</sup>} front-loaded to an employee at the beginning of each year.]]

**OR**

[~~The district employs {<sup>3</sup>} 10 or more employees and has established and invokes the “undue hardship” exception of ORS 653.621 (1)(b); therefore, 56 hours of paid sick time shall be {<sup>4</sup>} front loaded to an eligible employees at the beginning of each year.]~~

**OR**

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<sup>1</sup> {If the district is located in a city with a population exceeding 500,000, the threshold is whether the district employs at least six employees working anywhere in this state. }

<sup>2</sup> {For employees employed by an employer for less than a full year, “front-load” means to assign and make available to an employee as soon as the employee becomes eligible to use sick time a number of hours of sick time that is the pro rata percentage of the hours the employee would be entitled to for an entire year based on the number of hours the employee was actually employed by the employer for the year. ORS 653.601(5)(b) }

<sup>3</sup> {If the district is located in a city with a population exceeding 500,000, the threshold is whether the district employs at least six employees working anywhere in this state. }

<sup>4</sup> {For employees employed by an employer for less than a full year, “front-load” means to assign and make available to an employee as soon as the employee becomes eligible to use sick time a number of hours of sick time that is the pro rata percentage of the hours the employee would be entitled to for an entire year based on the number of hours the employee was actually employed by the employer for the year. ORS 653.601(5)(b) }

[~~A The district employing less than 10 employees and therefore shall provide access for an eligible employee of at least 40 hours of unpaid sick time or unpaid time off. [Unpaid sick time or time off shall accrue at the rate of at least one hour of paid sick time for every 30 hours the employee works, or 1 1/3 hours for every 40 hours the employee works.] [Unpaid sick time or time off shall be {<sup>5</sup>} front loaded to an employee at the beginning of each year.] ]~~

The employee may carry up to 40 hours of unused sick time from one year to the subsequent year. [{<sup>6</sup>} An employee is limited to [accruing no more than 80 hours of sick time] [and] [using no more than 40 hours of sick time in a year].]

[Sick time shall be taken {in hourly increments} [{<sup>7</sup>} Sick time shall be taken in ~~minimum~~ increments of more than [one] hour[s] ~~not to exceed four hours~~] [Sick time may be used in increments of less than one hour] and may be used for the employee's or a family member's<sup>8</sup> mental or physical illness, injury or health condition, need for medical diagnosis, care or treatment of a mental or physical illness, injury or health condition or need for preventive care, or for reasons consistent with ~~the~~ qualifying Family Medical Leave ~~Act~~ (FMLA), Paid Family and Medical Leave Insurance (PFMLI) or Oregon Family Leave (OFLA). Sick time may also be used in the event of a public health emergency or for leave to address domestic violence, harassment, sexual assault, bias, or stalking under ORS 659A.272. [When sick time is used to care for, or to deal with the death of, an individual related by blood or affinity whose close association with the district employee is the equivalent of a family relationship, the district requires an attestation form signed and submitted by the employee.]

The use of sick time may not lead to, or result in, an adverse employment action against the employee.

The district reserves the right, [after an employee uses sick time for more than [three] consecutive ~~scheduled workdays of absence~~], to require ~~proof of personal illness or injury from an employee~~ verification or certification in accordance with law of the need for the sick time, including a medical ~~examination by a physician chosen and~~ verification or certification<sup>9</sup> paid for by the district. ~~An~~ If an employee ~~refusing to submit to such an examination~~ fails to provide verification or certification or fails to

<sup>5</sup> {For employees employed by an employer for less than a full year, "front-load" means to assign and make available to an employee as soon as the employee becomes eligible to use sick time a number of hours of sick time that is the pro rata percentage of the hours the employee would be entitled to for an entire year based on the number of hours the employee was actually employed by the employer for the year. ORS 653.601(5)(b)}

<sup>6</sup> {If the district chooses to limit the accrual or usage, the district must choose language in the bracketed sentence and keep this sentence in policy. The application of these limits need not be applied to employers with less than 10 employees and who front-load at least 40 hours of unpaid sick time or unpaid time off at the beginning of each year used to calculate the accrual and usage of sick time or time off. (ORS 653.606 (1)(d))}

<sup>7</sup> {This bracketed option only applies if the public charter school claims "undue hardship" (as is defined in OAR 839-007-0000(7)) and front-loads 56 hours of paid sick time per year. The school may require the employee to use paid sick time in increments of more than one hour; however in the case of front-loading 56 hours of paid sick time, the school cannot require an employee to use sick time in increments that exceed four hours, however the employee may choose to do so. OAR 839-007-0025}

<sup>8</sup> "Family member" is defined ~~by the Oregon Family Leave Act (OFLA)~~ in OAR 839-007-0000.

<sup>9</sup> In the case of need for leave under ORS 659A.272, the district may not require the verification or certification to explain the nature of the illness or details related to the domestic violence, sexual assault, harassment, bias, or stalking, which necessitates the use of sick time.

provide other evidence as required by the district, the employee shall be subject to appropriate disciplinary action, up to and including dismissal.

When the reason for sick time is consistent with FMLA~~/~~, PFMLI or OFLA leave, ~~the~~ sick time leave and ~~the~~ qualifying FMLA~~/~~, PFMLI or OFLA leave may run concurrently.

When the reason for sick time is consistent with ORS 332.507, ~~the~~ sick time leave and leave pursuant to ORS 332.507 may run concurrently.

If the reason for sick time is a foreseeable absence, the district ~~may~~ requires ~~the~~ an employee to provide advance notice of ~~their~~ the intention to use sick time ~~within~~ <sup>{<sup>10</sup>}</sup> 10] days ~~of~~ prior to when the requested sick time is to begin<sup>5</sup>, or as soon as otherwise practicable. When ~~the~~ an employee uses sick time for a foreseeable absence, the employee shall take reasonable effort to schedule the sick time in a manner that does not unduly disrupt the operations of the district (e.g., grading deadlines, inservice training, mandatory meetings). ~~[The district may discipline an employee if the employee fails to make a reasonable effort to schedule leave in a manner that does not unduly disrupt the operations of the district.]~~

If the reason for sick time is unforeseeable, such as an emergency, accident or sudden illness, the employee shall notify the district ~~[consistent with the reporting time established by the district-~~or~~]~~ <sup>[at least 24 hours in advance-~~or~~]</sup> <sup>[before the start of the employee's shift]</sup>, or when circumstances prevent the employee from providing notice as required, as soon as practicable.

~~[The district may discipline an employee for violating workplace policies and procedures if the employee fails to provide notice as required.]~~

The district shall establish a standard process to track the eligibility for sick time of a substitute.

END OF POLICY

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#### Legal Reference(s):

[ORS 332.507](#)  
[ORS 342.545](#)

[ORS 342.610](#)  
[ORS 653.601 - 653.661](#)

[ORS 659A.150 - 659A.186](#)  
[OAR 839-007-0020 - 0065](#)

Americans with Disabilities Act-~~of 1990~~/Americans with Disabilities Act Amendments Act, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (~~2016~~2023); 28 C.F.R. Part 35 (~~2016~~2023).  
Family and Medical Leave Act-~~of 1993~~, 29 U.S.C. §§ 2601-2654 (~~2012~~2018); Family and Medical Leave Act-~~of 1993~~, 29 C.F.R. Part 825 (~~2016~~2023).  
~~Americans with Disabilities Act Amendments Act of 2008.~~

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<sup>10</sup> {ORS 653.621(3): "...not to exceed 10 days"}



# **SIUSLAW SCHOOL DISTRICT 97J**

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

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Presented to the Board of Directors:

|   |                          |
|---|--------------------------|
| Subject: EBBB-AR(1) - Accident and/or Incident Report | Item No: 010825-6.6      |
|   | Attachment: Yes          |
| Reason: Review – Review                               | From: Andrew Grzeskowiak |
|   | Date: January 8, 2025    |

## **Background:**

For review by the board. The reporting form is being updated to distinguish between accidents and incidents. Accidents occur beyond the regular control of individuals, whereas incidents occur as the result of a deliberate action of one or more people.

## **Recommendation:**

The Administration recommends that the Board of Directors adopt the updates to EBBB-AR(1) - Accident and/or Incident Report

## **Resolution #010825-6.6 EBBB-AR(1) - Accident and/or Incident Report :**

Be it Resolved that the Siuslaw School District Board adopt EBBB-AR(1) - Accident and/or Incident Report as presented.

---

Board Chair, Brian Lacouture

---

Andrew Grzeskowiak, Superintendent

# Siuslaw School District 97J

Code: EBBB-AR  
Adopted: 9/91  
Revised/Reviewed: 07/09/97; 01/08/14; 3/1/19;  
5/12/21; 1/8/2025

## Accident **and/or** Incident Report

Please fill out **the** form completely. Insert N/A if any question is not applicable. If **the** form is not completed in its entirety, it will be returned to the building administrator for completion.

Name of injured: \_\_\_\_\_  
First Middle Initial Last

Parent Name of injured student: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Date of Accident/Incident: \_\_\_\_\_ Time: \_\_\_\_\_

### Type of Report

- ☐ Accident with Injury – to building administrator, and then to district office  
☐ Incident with Injury – to building administrator, copy for discipline report, and then to district office  
☐ Incident without Injury – to building administrator, copy for discipline report

Location of Accident/Incident: \_\_\_\_\_  
School Building – **SES, SMS, SHS, Siuslaw West - and Room, Area, Field, Playground, School Bus or Off-Campus**

Accident/Incident Involved (Check One): \*Student \_\_\_\_\_ \*Employee \_\_\_\_\_ \*Patron \_\_\_\_\_

Activity Type: \*Class Activity ( ) \*Athletic Practice ( ) \*Athletic Game ( )  
\* Non Class Time ( ) \*Other ( ) \***Transportation to/from home on school bus ( )**

Person Responsible for Supervision: \_\_\_\_\_

Nature of Injury: \_\_\_\_\_

Describe accident **and/or** incident fully and in detail: \_\_\_\_\_

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

Was first aid or other immediate treatment given? Yes ( ) No ( ) If yes, describe: \_\_\_\_\_  
Continue description on back if necessary

Name of person(s) administering first aid: \_\_\_\_\_

Accident/Incident Report – EBBB-AR

1-2

Was the injured person taken to a physician? \_\_\_\_\_

Names of witnesses: \_\_\_\_\_

If injured person is a student, who called student's parent/guardian? \_\_\_\_\_

Contact date and time: \_\_\_\_\_

Signature of injured person: \_\_\_\_\_ Date: \_\_\_\_\_

Accident and/or Incident Description, continued: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Administrative Use Only:

Student Perm ID – injured student: \_\_\_\_\_

Student Perm ID – other; note status: \_\_\_\_\_

Date report received: \_\_\_\_\_ Form completed by: \_\_\_\_\_

Signature of administrator or designee: \_\_\_\_\_

Date Accident and/or Incident report was mailed to parent/guardian: \_\_\_\_\_



# **SIUSLAW SCHOOL DISTRICT 97J**

*Motivating and Preparing All Students to Reach Their Greatest Potential*

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

"Home of the Vikings"

Presented to the Board of Directors:

|  |                          |
|--|--------------------------|
| Subject: Appoint Budget Committee Position 5 | Item No: 010825-6.7      |
|  | Attachment: Yes          |
| Reason: Action                               | From: Andrew Grzeskowiak |
|  | Date: January 8, 2025    |

## **Background:**

The budget committee consists of seven members appointed by the board plus the elected board members. Policy DBEA specifies that the board must announce the vacancies and receive applications from interested people. The board previously announced the vacancies and has been accepting applications based upon announcements located on the district website and in the media. Positions 5 has 3-year terms which expired June 30, 2027

## **Recommendation:**

Administration recommends the appointment of the applicant to fill budget committee position 5 which expires June 30, 2027.

## **Resolution #010825-6.7– Appoint Budget Committee Position 5:**

Be it Resolved that the Siuslaw School District Board of Directors appoint ***Lisa Walter Sedlacek*** to Budget Committee Position 5 as presented

---

Board Chair, Brian Lacouture

---

Andrew Grzeskowiak, Superintendent





## SIUSLAW SCHOOL DISTRICT 97J

2111 Oak Street ♦ Florence, Oregon 97439 ♦ (541) 997-2651 ♦ Fax (541) 997-4160

School District Website: <http://www.siuslaw.k12.or.us>

"Home of  
the Vikings"

**Motivating and Preparing All Students to Reach Their Greatest Potential**

Siuslaw Elementary School ♦ Siuslaw Middle School ♦ Siuslaw High School

### Application for Appointment to the Siuslaw School District Budget Committee

The School Board appreciates your interest in serving on the Siuslaw School District Budget Committee. To be considered for appointment to this committee, please complete this form and return it to the Siuslaw School Board (District Office), 2111 Oak Street, Florence, Oregon 97439. Email to: 97j@siuslaw.k12.or.us

The deadline for receipt of completed application forms is 5:00pm on ~~September 11, 2023~~ <sup>September 26, 2024</sup>. The Board will consider applications for appointment at the ~~September 13, 2023~~ <sup>December 11, 2024</sup> School Board Meeting.

By state law and district policy, Siuslaw School District Budget Committee members must:

- 1) Live and be registered to vote in the district;
- 2) Not be an officer, agent or employee of the district.

No committee member may receive any type of compensation from the district.

Name Lisa Walter Sedlacek  
Address [REDACTED]  
Phone [REDACTED]  
Email [REDACTED]  
Do you reside in the district? Yes How long? 43 yrs  
Occupation Semi-retired Landscape Designer Are you registered to vote? ☒ YES ☐ NO

Briefly state your reasons for applying for this position:

As a strong supporter and parent of Siuslaw School graduates, I appreciate the caliber and dedication of our district employees and their dedication to education. It is important to have a strong budget process to help facilitate the allocation of budget resources. I would like to be a part of this, and help with the planning and goals of our School District.

Special interests or qualifications:

Small business owner 43 yrs, Rotary Board member 14 yrs with monthly budget reviews, Chamber of Commerce board member with budget reviews, past PTA president, knowledge of budget planning as chair of OR Landscape Contractors Board.

Signature of Applicant

Lisa M Walter Sedlacek

Date

12/20/2024  
9/10/2023

8/24/23

Dedicated to Success for All Students



RECEIVED

DEC 20 2024

80

## Business Manager Communications

### PERS Employer Rate Increase

The 2025-2027 biennium rates will increase labor expenditures in the upcoming budget. Currently the district pays 14.41% for Tier 1/Tier II employees and 11.57% for OPSRP General Service employees. These rates have increased to 24.84% (Tier I/ Tier II) and 21.66% (OPSRP), respectively.

### Rate Determinations

PERS rates change **July 1** in odd years (e.g., 2025, 2027, 2029) based on the prior year's actuarial evaluation( Guide to Understanding, n.d.) . This would mean there is an **18-month lag** between employer rate changes and the actuarial valuation.

Key factors used in determining employer rates include:

- **Member Data:** Number of active, inactive, and retired employees.
- **Employer's Payroll:** Payroll volume and trends.
- **Overall, Health of the PERS Fund:** Investment returns and projected future liabilities.

### What Led to the Increases This Biennium?

Several factors contributed to the rate increases for the 2025–2027 biennium:

1. **Lower-than-expected asset returns:**
  - 2022: Loss of **2.01%**.
  - 2023: Gain of **5.98%**.
  - Both fall short of the assumed **6.9% annual return** (*Employer Rate Summary, 2024*).
2. **Payroll growth exceeding assumptions:**
  - PERS system payroll grew **9%** in 2022 and **10.5%** in 2023, compared to the assumption of **3.4% average growth**.
  - Our district's 5-year payroll average growth rate was **11.01%**.

These factors reduced side account offset rates significantly. For example, the side account offset rate dropped to **4.86%**, down from **13.74%** and **13.46%** in prior years. I have included the district's evaluation report within these communications.

References:

*Guide to Understanding your rate.* (n.d.), Oregon PERS Fund.

<https://www.oregon.gov/pers/emp/Documents/UALRP-Guides/understanding-your-rate.pdf>

*Employer Rate Summary.*(2024). State of Oregon.

<https://www.oregon.gov/pers/emp/Pages/Employer-Rate-Summary.aspx>

## Summary of PERS Employer Contribution Rates

Rates shown reflect the effect of side account rate offsets and retiree healthcare contributions, and exclude contributions to the IAP and debt service for pension obligation bonds.

| Employer<br>Number | Employer Name                          | Net Employer Contribution Rate<br>7/1/23 - 6/30/25                              |   |                                     | Net Employer Contribution Rate<br>7/1/25 - 6/30/27                              |   |                                     |
|--------------------|--|---|---|-------------------------------------|---|---|-------------------------------------|
|                    |  |   | OPSRP<br>General Service<br>Payroll<br>(reflects 0.65% member<br>redirect offset) | OPSRP<br>Police and<br>Fire Payroll |   | OPSRP<br>General<br>Service Payroll<br>(reflects 0.65% member<br>redirect offset) | OPSRP<br>Police and<br>Fire Payroll |
|                    |  | Tier One / Tier<br>Two Payroll<br>(reflects 2.40%<br>member<br>redirect offset) |   |                                     | Tier One / Tier<br>Two Payroll<br>(reflects 2.40%<br>member<br>redirect offset) |   |                                     |
| School Districts   |  |   |   |                                     |   |   |                                     |
| School             |  |   |   |                                     |   |   |                                     |
| 4342               | North Santiam School District #29J     | 0.24%   | 0.00%   | 2.19%                               | 6.49%   | 3.31%   | 8.58%                               |
| 4381               | North Wasco County School District #21 | 13.33%  | 10.49%  | 15.28%                              | 26.22%  | 23.04%  | 28.31%                              |
| 3307               | Oakland School District                | 25.93%  | 23.09%  | 27.88%                              | 28.41%  | 25.23%  | 30.50%                              |
| 3524               | Oakridge School District               | 13.91%  | 11.07%  | 15.86%                              | 18.58%  | 15.40%  | 20.67%                              |
| 3684               | Ontario School District #8C            | 18.21%  | 15.37%  | 20.16%                              | 24.24%  | 21.06%  | 26.33%                              |
| 3122               | Oregon City School District #62        | 6.36%   | 3.52%   | 8.31%                               | 12.45%  | 9.27%   | 14.54%                              |
| 4345               | Oregon Trail School District 46        | 27.38%  | 24.54%  | 29.33%                              | 29.31%  | 26.13%  | 31.40%                              |
| 3462               | Paisley School District                | 25.61%  | 22.77%  | 27.56%                              | 28.17%  | 24.99%  | 30.26%                              |
| 3820               | Parkrose School District               | 9.17%   | 6.33%   | 11.12%                              | 13.48%  | 10.30%  | 15.57%                              |
| 3931               | Pendleton School District #16R         | 2.83%   | 0.00%   | 4.78%                               | 13.82%  | 10.64%  | 15.91%                              |
| 3043               | Philomath School District #17J         | 19.18%  | 16.34%  | 21.13%                              | 24.97%  | 21.79%  | 27.06%                              |
| 3414               | Phoenix-Talent School District         | 13.59%  | 10.75%  | 15.54%                              | 22.65%  | 19.47%  | 24.74%                              |
| 3958               | Pilot Rock School District #2R         | 13.64%  | 10.80%  | 15.59%                              | 21.31%  | 18.13%  | 23.40%                              |
| 3470               | Pleasant Hill School District          | 27.26%  | 24.42%  | 29.21%                              | 29.23%  | 26.05%  | 31.32%                              |
| 3818               | Portland Public Schools                | 0.00%   | 0.00%   | 1.29%                               | 8.60%   | 5.42%   | 10.69%                              |
| 4403               | Portland Village School                | 26.37%  | 23.53%  | 28.32%                              | 28.73%  | 25.55%  | 30.82%                              |
| 3370               | Prairie City School District #4        | 20.48%  | 17.64%  | 22.43%                              | 25.45%  | 22.27%  | 27.54%                              |
| 4320               | Rainier School District #13            | 12.44%  | 9.60%   | 14.39%                              | 19.66%  | 16.48%  | 21.75%                              |
| 4311               | Redmond School District #2J            | 8.14%   | 5.30%   | 10.09%                              | 15.01%  | 11.83%  | 17.10%                              |
| 4312               | Reedsport School District              | 15.82%  | 12.98%  | 17.77%                              | 22.80%  | 19.62%  | 24.89%                              |
| 3824               | Reynolds School District               | 8.43%   | 5.59%   | 10.38%                              | 18.70%  | 15.52%  | 20.79%                              |
| 3847               | Riverdale School                       | 13.98%  | 11.14%  | 15.93%                              | 21.50%  | 18.32%  | 23.59%                              |
| 3310               | Roseburg Public Schools                | 1.38%   | 0.00%   | 3.33%                               | 11.71%  | 8.53%   | 13.80%                              |
| 3735               | Salem-Keizer Public Schools            | 16.31%  | 13.47%  | 18.26%                              | 22.51%  | 19.33%  | 24.60%                              |
| 3665               | Santiam Canyon School District         | 14.43%  | 11.59%  | 16.38%                              | 21.37%  | 18.19%  | 23.46%                              |
| 3000               | School Districts                       | 27.87%  | 25.03%  | 29.82%                              | 29.70%  | 26.52%  | 31.79%                              |
| 3647               | Scio School District #95C              | 23.35%  | 20.51%  | 25.30%                              | 25.54%  | 22.36%  | 27.63%                              |
| 3187               | Seaside Schools                        | 16.97%  | 14.13%  | 18.92%                              | 22.26%  | 19.08%  | 24.35%                              |
| 4440               | Sheridan Allprep Academy               | 24.16%  | 21.32%  | 26.11%                              | 28.78%  | 25.60%  | 30.87%                              |
| 4144               | Sheridan School District #48J          | 26.93%  | 24.09%  | 28.88%                              | 28.85%  | 25.67%  | 30.94%                              |
| 4337               | Sherman County School District         | 19.01%  | 16.17%  | 20.96%                              | 22.56%  | 19.38%  | 24.65%                              |
| 4317               | Sherwood School District #88J          | 22.84%  | 20.00%  | 24.79%                              | 26.09%  | 22.91%  | 28.18%                              |
| 4270               | Silver Falls School District           | 6.34%   | 3.50%   | 8.29%                               | 15.83%  | 12.65%  | 17.92%                              |
| 3296               | Sisters School District                | 9.51%   | 6.67%   | 11.46%                              | 21.16%  | 17.98%  | 23.25%                              |
| 3537               | Siuslaw School District #97J           | 14.41%  | 11.57%  | 16.36%                              | 24.84%  | 21.66%  | 26.93%                              |
| 3506               | South Lane School District             | 0.00%   | 0.00%   | 0.00%                               | 7.17%   | 3.99%   | 9.26%                               |

October 2024

Siuslaw School District #97J/3537  
Oregon Public Employees Retirement System

As part of our engagement with the Oregon Public Employees Retirement Board, we performed a system-wide actuarial valuation of the Oregon Public Employees Retirement System (“PERS” or “the System”) as of December 31, 2023. The attached report, which is an informational supplement to the system-wide actuarial valuation report, provides you with employer-specific contribution rates that will become effective July 1, 2025. Information to assist you in preparing your required financial reporting disclosures under Statement 68 and Statement 75 of the Governmental Accounting Standards Board (GASB) will be provided separately by PERS and is not included in this report.

This report reflects the System's benefit provisions in effect as of December 31, 2023, as modified by House Bill 4045 from the 2024 legislative session, as described in the system-wide actuarial valuation report. The full development of the valuation results for the Tier One/Tier Two School District Pool, Oregon Public Service Retirement Plan (OPSRP), and the Retiree Health Insurance Account (RHIA) can be found in the separate system-wide actuarial valuation report. Costs of the IAP (Individual Account Program) are not included in this or the system-wide actuarial valuation report. Further, costs of pension obligation bond payments are not included in this or the system-wide actuarial valuation report.

**If you have any questions about this report, please contact [actuarial.services@pers.oregon.gov](mailto:actuarial.services@pers.oregon.gov).**

## Contents of Report

The executive summary provides the basic information you need, including:

- Contribution rates for Tier One/Tier Two, OPSRP general service, and OPSRP police and fire payroll, and
- A summary of principal valuation results.

The remainder of the report provides additional information including:

- Side account balances, transactions, and rate relief,
- A brief summary of methods and assumptions, and
- A brief summary of any changes in System benefit provisions.

Additional information is provided in the system-wide actuarial valuation report, which is available at [www.oregon.gov/PERS/Pages/Financials/Actuarial-Financial-Information.aspx](http://www.oregon.gov/PERS/Pages/Financials/Actuarial-Financial-Information.aspx).

October 2024

Siuslaw School District #97J/3537

The actuarial computations presented in this report are for purposes of determining the contribution rates effective from July 2025 to June 2027 for System employers. The calculations in the enclosed report have been made on a basis consistent with our understanding of the System's funding requirements and goals, and with our understanding of the System benefit provisions described in the appendices of this report. Determinations for other purposes may be significantly different from the results contained in this report. Accordingly, additional determinations may be needed for other purposes.

Actuarial assumptions, including discount rates, mortality tables, and others identified in this report, and actuarial cost methods are adopted by the Board. The Board is responsible for selecting the System's funding policy, actuarial valuation methods, asset valuation methods, and assumptions. The policies, methods, and assumptions used in the valuation are those that have been so adopted and are described in this report. All costs, liabilities, rates of interest, and other factors for the System have been determined on the basis of actuarial assumptions and methods which, in our professional opinion, are individually reasonable (taking into account the experience of the System and reasonable expectations); and which, in combination, offer a reasonable estimate of anticipated future experience affecting the System and are expected to have no significant bias.

This valuation report is only an estimate of the System's financial condition as of a single date. It can neither predict the System's future condition nor guarantee future financial soundness. Actuarial valuations do not affect the ultimate cost of System benefits, only the timing of System contributions. While the valuation is based on an array of individually reasonable assumptions, other assumption sets may also be reasonable and valuation results based on those assumptions would be different. No one set of assumptions is uniquely correct.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as, but not limited to, the following: System experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period or modifications to contribution calculations based on the System's funded status); and changes in System benefit provisions or applicable law. Due to the limited scope of this assignment, we did not perform an analysis of the potential range of future measurements. The Board has the final decision regarding the selection of the assumptions and actuarial cost methods and adopted them as indicated herein at the September 2023 Board Meeting.

In preparing this report, we relied, without audit, on information (some oral and some in writing) supplied by the System's staff. This information includes, but is not limited to, System benefit provisions as defined by statute, member census data, and financial information. We found this information to be reasonably consistent and comparable with information used for other purposes. The valuation results depend on the integrity of this information. If any of this information is inaccurate or incomplete our results may be different, and our calculations may need to be revised.

October 2024

Siuslaw School District #97J/3537

Milliman's work has been prepared for a specific and limited purpose solely for the use and benefit of the Oregon Public Employees Retirement System, the employer named above, or its auditors for the purpose of completing an audit related to matters herein. Milliman does not intend to benefit or create a legal duty to any third-party recipient of this work. It is a complex, technical analysis that assumes a high level of knowledge concerning the System's operations, and uses the System's data, which Milliman has not audited. No third-party recipient of Milliman's work product should rely upon this report. Such recipients should engage qualified professionals for advice appropriate to their own specific needs.

The valuation results were developed using models intended for valuations that use standard actuarial techniques. We have reviewed the models, including their inputs, calculations, and outputs, for consistency, reasonableness, and appropriateness to the intended purpose and in compliance with generally accepted actuarial practice and relevant actuarial standards of practice.

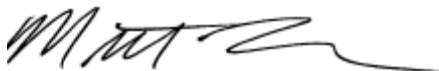
The consultants who worked on this assignment are actuaries. Milliman's advice is not intended to be a substitute for qualified legal or accounting counsel.

The signing actuaries are independent of the System. We are not aware of any relationship that would impair the objectivity of our work.

On the basis of the foregoing, we hereby certify that, to the best of our knowledge and belief, this report is complete and accurate and has been prepared in accordance with generally recognized and accepted actuarial principles and practices which are consistent with the principles prescribed by the Actuarial Standards Board and the Code of Professional Conduct and Qualification Standards for Actuaries Issuing Statements of Actuarial Opinion in the United States published by the American Academy of Actuaries. We are members of the American Academy of Actuaries and meet the Qualification Standards to render the actuarial opinion contained herein.

Additional information is provided in the system-wide actuarial valuation report.

Sincerely,

A handwritten signature in black ink, appearing to read 'Matt Larrabee'.

Matt Larrabee, FSA, EA, MAAA  
Principal and Consulting Actuary

A handwritten signature in black ink, appearing to read 'Scott Preppernau'.

Scott Preppernau, FSA, EA, MAAA  
Principal and Consulting Actuary

# **ACTUARIAL VALUATION REPORT DECEMBER 31, 2023**

## **OREGON PUBLIC EMPLOYEES RETIREMENT SYSTEM**

**SCHOOL DISTRICT POOL**

**Siuslaw School District #97J -- #3537**

October 2024

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## Executive Summary

Milliman has prepared this report for Siuslaw School District #97J to:

- Provide summary December 31, 2023 valuation results for the Tier One/Tier Two School District Pool, Oregon Public Service Retirement Plan (OPSRP), and the Retiree Health Insurance Account (RHIA),
- Provide employer-specific contribution rates effective July 1, 2025 through June 30, 2027, and
- Provide employer-specific information on side accounts as of December 31, 2023.

This report summarizes the valuation results for the School District Pool, OPSRP, and RHIA. The full development of these results can be found in the December 31, 2023 system-wide actuarial valuation report. This report develops employer-specific side account rates and applies the results from the system-wide actuarial valuation to Siuslaw School District #97J.

## Retirement System Risks

Oregon PERS, like all defined benefit plans, is subject to various risks that will affect the future plan liabilities and contribution requirements, including investment risk, demographic risk, and contribution risk. While the results of an actuarial valuation are based on one set of reasonable assumptions, it is almost certain that future experience will not exactly match the assumptions. The section of the system-wide actuarial valuation report titled "Risk Disclosure" discusses the System's risks in more detail.

## Employer Contribution Rates

The following tables summarize the employer contribution rates effective July 1, 2025 through June 30, 2027 calculated as of December 31, 2023 and the employer contribution rates effective July 1, 2023 through June 30, 2025 calculated as of December 31, 2021 for each type of payroll. There are separate normal cost rates for each of the payrolls based on the benefit structure supported by that payroll. The other rates apply to all payrolls regardless of the benefit structure to which they are attributed.

The employer contribution rates effective July 1, 2023 through June 30, 2025 are as previously published and do not reflect subsequent changes such as supplemental payments made by the employer.

In this report, the payroll of Tier One and Tier Two members is referred to as Tier One/Tier Two valuation payroll. Combined valuation payroll refers to the payroll for Tier One/Tier Two members, OPSRP general service members, and OPSRP police and fire members.

As discussed in the system-wide actuarial valuation report, we believe the contribution rates shown in this report constitute "reasonable actuarially determined contributions" as defined in Actuarial Standards of Practice. See the system-wide actuarial valuation report for more detail.

# Executive Summary

## Employer Contribution Rates (continued)

### *Employer Contribution Rates Effective July 1, 2025*

|   | Tier One/Tier Two | Payroll         |               |
|---|-------------------|-----------------|---------------|
|   |                   | OPSRP           |               |
|   |                   | General Service | Police & Fire |
| <b>Pension</b>                                |                   |                 |               |
| Normal cost rate                              | 15.40%            | 10.47%          | 15.74%        |
| Tier One/Tier Two UAL rate <sup>1</sup>       | 13.95%            | 13.95%          | 13.95%        |
| Multnomah Fire District #10 UAL rate          | 0.06%             | 0.06%           | 0.06%         |
| OPSRP UAL rate                                | 2.69%             | 2.69%           | 2.69%         |
| Side account rate relief <sup>2</sup>         | (4.86%)           | (4.86%)         | (4.86%)       |
| Member redirect offset <sup>3</sup>           | (2.40%)           | (0.65%)         | (0.65%)       |
| <b>Net employer pension contribution rate</b> | <b>24.84%</b>     | <b>21.66%</b>   | <b>26.93%</b> |
| <b>Retiree Healthcare</b>                     |                   |                 |               |
| Normal cost rate                              | 0.04%             | 0.00%           | 0.00%         |
| UAL rate                                      | (0.04%)           | 0.00%           | 0.00%         |
| <b>Net retiree healthcare rate</b>            | <b>0.00%</b>      | <b>0.00%</b>    | <b>0.00%</b>  |
| <b>Total net employer contribution rate</b>   | <b>24.84%</b>     | <b>21.66%</b>   | <b>26.93%</b> |

### *Employer Contribution Rates Effective July 1, 2023*

|   | Tier One/Tier Two | Payroll         |               |
|---|-------------------|-----------------|---------------|
|   |                   | OPSRP           |               |
|   |                   | General Service | Police & Fire |
| <b>Pension</b>                                |                   |                 |               |
| Normal cost rate                              | 14.48%            | 9.89%           | 14.68%        |
| Tier One/Tier Two UAL rate <sup>1</sup>       | 13.95%            | 13.95%          | 13.95%        |
| Multnomah Fire District #10 UAL rate          | 0.15%             | 0.15%           | 0.15%         |
| OPSRP UAL rate                                | 1.69%             | 1.69%           | 1.69%         |
| Side account rate relief <sup>2</sup>         | (13.46%)          | (13.46%)        | (13.46%)      |
| Member redirect offset <sup>3</sup>           | (2.40%)           | (0.65%)         | (0.65%)       |
| <b>Net employer pension contribution rate</b> | <b>14.41%</b>     | <b>11.57%</b>   | <b>16.36%</b> |
| <b>Retiree Healthcare</b>                     |                   |                 |               |
| Normal cost rate                              | 0.04%             | 0.00%           | 0.00%         |
| UAL rate                                      | (0.04%)           | 0.00%           | 0.00%         |
| <b>Net retiree healthcare rate</b>            | <b>0.00%</b>      | <b>0.00%</b>    | <b>0.00%</b>  |
| <b>Total net employer contribution rate</b>   | <b>14.41%</b>     | <b>11.57%</b>   | <b>16.36%</b> |

<sup>1</sup> Includes any impact of rate collar developed in the system-wide actuarial valuation report.

<sup>2</sup> The side account rate relief shown may be reduced such that the net pension contribution rate does not go below 0.00%.

<sup>3</sup> Redirected member contributions under Senate Bill 1049 (2.50% of payroll for Tier One/Tier Two and 0.75% of payroll for OPSRP) will offset employer contribution rates. Redirect does not apply to members with monthly pay below a threshold. The values shown in the table incorporate an estimate of the effect of this limitation.

## Executive Summary

### Employer Contribution Rates (continued)

#### ***Range of Potential Tier One/Tier Two UAL Contribution Rates for the July 2027 to June 2029 Biennium***

The rate collar limits changes in the Tier One/Tier Two UAL Rate for the rate pool, but does not limit changes in rates for individual employers related to side accounts and does not limit the change in the normal cost rate. The table below shows the possible minimum and maximum Tier One/Tier Two UAL Rates for the School District Pool first effective as of July 1, 2027. The collar width, which in general is the amount the UAL Rate could increase or decrease from the current UAL Rate being paid, is 3% of pay. However, the UAL Rate is only allowed to decrease by the full collar width if the funded status (excluding side accounts) of the School District Pool is greater than or equal to 90%. The UAL Rate is not allowed to decrease at all if funded status is below 87%, and the allowable decrease is phased in for funded status levels from 87% to 90%.

For reference, the Pool's funded status excluding side accounts as of December 31, 2023 is 76%.

| 2025-2027 Biennium | 2027-2029 Biennium |   |
|--------------------|--------------------|---|
|                    | 16.95%             | <<<No higher than this  |
| 13.95%             | 13.95%             | <<<No lower than this if December 31, 2025 funded status is 87% or lower  |
|                    | 10.95%             | <<<No lower than this if December 31, 2025 funded status is 90% or higher |

For individual school districts, the School District Pool rate is adjusted for any rate relief provided by a side account rate offset to determine the individual district's net contribution rate.

### ***Normal Cost Rates***

As seen on the prior page, the other large rate components are the normal cost rates for the Tier One/Tier Two and OPSRP programs. The normal cost rate represents the projected cost of benefits earned by current year service.

The normal cost rate in any biennium is driven by the active member demographics of the experience pooling groups in which the employer's members participate. The active member census as of this rate-setting valuation is used to calculate the adopted 2025 - 2027 biennium normal cost rate.

Each biennium's normal cost rate is also sensitive to the investment return assumption, or assumed rate, adopted by the PERS Board for the valuation. The lower the assumed rate, the higher the normal cost rate. The normal cost rate that will be effective as of July 1, 2027 will be based on the active demographics and investment return assumption as of December 31, 2025.

# Executive Summary

## Accounting Information

Milliman is not an accounting or audit firm and cannot provide accounting advice. Milliman is not responsible for the interpretation of, or compliance with, accounting standards; citations to, and descriptions of accounting standards provided in this report are for reference purposes only. The information provided in this section is intended to assist the employer in completing its financial statements, but any accounting determination should be reviewed by your auditor.

## *Pension*

In June 2012 the GASB issued Statement No. 68 (GASB 68), which replaced Statement No. 27 and governs employer financial reporting for fiscal years beginning after June 15, 2014. The new standard replaced many of the key elements of the prior reporting requirements. Under the new rules, employers are required to record a balance sheet liability for their unfunded pension obligations. In addition, the timing and coordination of plan and employer reporting has changed under the new requirements. GASB 68 information for employers will be provided separately by PERS and is not included in this report.

## *Retiree Healthcare*

In June 2015, the GASB issued Statement No. 75 (GASB 75), which replaced Statement No. 45 and governs employer financial reporting for retiree healthcare obligations for fiscal years beginning after June 15, 2017. In general, the changes required by GASB 75 parallel those that occurred for pension reporting when GASB 68 replaced GASB 27. Accounting information for reporting the Retiree Health Insurance Account (RHIA) under GASB 75 will be provided separately and is not included in this report.

# Executive Summary

## Principal Valuation Results

A summary of principal valuation results from the current valuation and the prior valuation follows. Any changes in actuarial assumptions, methods, or plan provisions between the two valuations are described later in this report. More detailed information can be found in the system-wide actuarial valuation report.

District-specific valuation results are only shown for districts with a side account as valuation results for districts without a side account are fully summarized by the School District Pool results, which are shown on the next page.

### ***Siuslaw School District #97J***

|  | Actuarial Valuation as of |                   |
|--|---------------------------|-------------------|
|  | December 31, 2023         | December 31, 2022 |
| Allocated pooled Tier One/Tier Two UAL           | \$19,334,706              | \$18,832,786      |
| Allocated pooled OPSRP UAL                       | 3,277,890                 | 2,790,086         |
| Side account                                     | 3,719,298                 | 5,110,350         |
| Net unfunded pension actuarial accrued liability | 18,893,298                | 16,512,522        |
| Combined valuation payroll                       | 12,252,832                | 11,071,519        |
| Net pension UAL as a percentage of payroll       | 154%                      | 149%              |
| Calculated Side Account Rate Relief              | (4.86%)                   | (8.63%)           |
| Allocated Pooled RHIA UAL                        | (\$320,119)               | (\$299,586)       |

*In the above exhibit, UAL amounts for the various pools (School District Tier One/Tier Two Pension, OPSRP, and RHIA) are allocated pro-rata based on the ratio of an employer's combined valuation payroll to the combined valuation payroll of the applicable pool. This allocation differs from the proportionate share of Net Pension Liability (NPL) that will be allocated to employers under GASB 68.*

# Executive Summary

## Principal Valuation Results (continued)

### *School District Pool*

| (\$ in millions)                                | Actuarial Valuation as of |                   |
|---|---------------------------|-------------------|
|   | December 31, 2023         | December 31, 2022 |
| Normal cost                                     | \$179.1                   | \$188.3           |
| Tier One/Tier Two valuation payroll             | 1,162.8                   | 1,195.0           |
| Normal cost rate                                | 15.40%                    | 15.76%            |
| Actuarial accrued liability                     | \$32,627.7                | \$32,457.6        |
| Actuarial asset value                           | 24,761.5                  | 24,603.8          |
| Unfunded actuarial accrued liability            | 7,866.2                   | 7,853.8           |
| Funded status                                   | 76%                       | 76%               |
| Combined valuation payroll                      | \$4,985.0                 | \$4,617.1         |
| UAL as a percentage of payroll                  | 158%                      | 170%              |
| UAL rate (includes Multnomah Fire District #10) | 14.01%                    | 14.03%            |
| Tier One/Tier Two Active Members                |                           |                   |
| ▪ Count   | 13,402                    | 14,737            |
| ▪ Average Age                                   | 54.7                      | 54.3              |
| ▪ Average Service                               | 23.5                      | 22.9              |
| ▪ Average Valuation Salary (in dollars)         | \$86,764                  | \$81,088          |
| Tier One/Tier Two Dormant Members               |                           |                   |
| ▪ Count   | 8,605                     | 9,070             |
| ▪ Average Age                                   | 59.0                      | 58.5              |
| ▪ Average Monthly Benefit (in dollars)          | \$1,213                   | \$1,204           |
| Tier One/Tier Two Retirees and Beneficiaries    |                           |                   |
| ▪ Count   | 71,424                    | 71,262            |
| ▪ Average Age                                   | 74.6                      | 74.2              |
| ▪ Average Monthly Benefit (in dollars)          | \$2,540                   | \$2,487           |

In our opinion, the funded status measures shown in this report are appropriate for assessing the need for and amount of future contributions as part of an ongoing long-term funding policy. The funded status measures are not intended to estimate the cost of settling the System's obligations through an annuity purchase or similar transaction.

# Executive Summary

## Principal Valuation Results (continued)

### OPSRP

| (\$ in millions)                        | Actuarial Valuation as of |                   |
|---|---------------------------|-------------------|
|   | December 31, 2023         | December 31, 2022 |
| General service normal cost             | \$1,103.9                 | \$970.5           |
| OPSRP general service valuation payroll | 10,546.7                  | 9,200.3           |
| General service normal cost rate        | 10.47%                    | 10.55%            |
| Police and fire normal cost             | \$230.1                   | \$191.9           |
| OPSRP police and fire valuation payroll | 1,462.1                   | 1,267.8           |
| Police and fire normal cost rate        | 15.74%                    | 15.14%            |
| Actuarial accrued liability             | \$17,041.2                | \$14,544.9        |
| Actuarial asset value                   | 12,952.4                  | 11,060.9          |
| Unfunded actuarial accrued liability    | 4,088.7                   | 3,484.1           |
| Funded status                           | 76%                       | 76%               |
| Combined valuation payroll              | \$15,316.5                | \$13,856.6        |
| UAL as a percentage of payroll          | 27%                       | 25%               |
| UAL rate                                | 2.69%                     | 2.62%             |

### Retiree Healthcare

| RHIA (\$ in millions)                | Actuarial Valuation as of |                   |
|--------------------------------------|---------------------------|-------------------|
|                                      | December 31, 2023         | December 31, 2022 |
| Normal cost                          | \$1.2                     | \$1.3             |
| Tier One/Tier Two valuation payroll  | 3,307.7                   | 3,388.6           |
| Normal cost rate                     | 0.04%                     | 0.04%             |
| Actuarial accrued liability          | \$329.8                   | \$345.0           |
| Actuarial asset value                | 729.9                     | 720.0             |
| Unfunded actuarial accrued liability | (400.2)                   | (374.9)           |
| Funded status                        | 221%                      | 209%              |
| Combined valuation payroll           | \$15,316.5                | \$13,856.6        |
| UAL as a percentage of payroll       | (3%)                      | (3%)              |
| UAL rate                             | (0.04%)                   | (0.04%)           |

## Side Account Information

### Reconciliation of Side Accounts

The following table reconciles the total side account from the beginning of the year to the end of the year. Side account transfers were calculated by PERS and made on a monthly basis. The amount of these transfers is shown in the table below.

All information in this table has been provided by PERS.

|   | New        | Continuing         | Total              |
|---|------------|--------------------|--------------------|
| <b>1. Side account as of December 31, 2022</b>                                    | <b>N/A</b> | <b>\$5,110,350</b> | <b>\$5,110,350</b> |
| 2. Deposits during 2023   |            |                    |                    |
| 3. Administrative expenses  |            | (500)              | (500)              |
| 4. Amount transferred to employer reserves during 2023                            |            | (1,635,055)        | (1,635,055)        |
| 5. Side account earnings during 2023  |            | 244,503            | 244,503            |
| <b>6. Side account as of December 31, 2023</b><br><b>(1. + 2. + 3. + 4. + 5.)</b> |            | <b>\$3,719,298</b> | <b>\$3,719,298</b> |



## Side Account Information

### Side Account Balances

|                | Deposit Date | Rate Offset<br>End Date | December 31, 2023  | December 31, 2022  |
|----------------|--------------|-------------------------|--------------------|--------------------|
| Side Account 1 | 2/27/2004    | 12/31/2027              | \$3,719,298        | \$5,110,350        |
| Side Account 2 |              |                         | 0                  | 0                  |
| Side Account 3 |              |                         | 0                  | 0                  |
| Side Account 4 |              |                         | 0                  | 0                  |
| Side Account 5 |              |                         | 0                  | 0                  |
| <b>Total</b>   |              |                         | <b>\$3,719,298</b> | <b>\$5,110,350</b> |

### Development of Side Account Rate

The rate relief attributable to an employer's side account is determined by amortizing the side account balance on the valuation date over a fixed period and expressing the result as a percentage of combined valuation payroll. For side accounts established prior to December 31, 2009, the fixed period ends December 31, 2027. For side accounts established at a later date, the default fixed period ends 18 years after the first rate-setting valuation following its creation, though employers can select a shorter period under certain specified circumstances. For employers with more than one side account, the total side account rate is determined by calculating the rate on each side account separately and adding the rates together.

| December 31, 2023          |                      |                                     |                                | December 31, 2022          |                                     |                                |
|----------------------------|----------------------|-------------------------------------|--------------------------------|----------------------------|-------------------------------------|--------------------------------|
| Combined valuation payroll |                      | \$12,252,832                        |                                | Combined valuation payroll |                                     | \$11,071,519                   |
|                            | Side account balance | Amortization factor <sup>1, 2</sup> | Side account rate <sup>1</sup> | Side account balance       | Amortization factor <sup>1, 2</sup> | Side account rate <sup>1</sup> |
| 1.                         | \$3,719,298          | 6.246                               | (4.86%)                        | \$5,110,350                | 5.349                               | (8.63%)                        |
| 2.                         | 0                    |                                     | 0.00%                          | 0                          |                                     | 0.00%                          |
| 3.                         | 0                    |                                     | 0.00%                          | 0                          |                                     | 0.00%                          |
| 4.                         | 0                    |                                     | 0.00%                          | 0                          |                                     | 0.00%                          |
| 5.                         | 0                    |                                     | 0.00%                          | 0                          |                                     | 0.00%                          |
| Total                      | \$3,719,298          |                                     | (4.86%)                        | \$5,110,350                |                                     | (8.63%)                        |

<sup>1</sup> Amortization factor and side account rate not shown for side accounts with less than two years remaining in the amortization period

<sup>2</sup> Effective December 31, 2022, includes adjustment for contribution lag as described in the system-wide actuarial valuation report

## Brief Summary of Actuarial Methods and Assumptions

A detailed summary of the actuarial methods and assumptions used to prepare the December 31, 2023 valuation can be found in the system-wide actuarial valuation report.

### Actuarial Methods and Valuation Procedures

A brief summary of the methods used in this valuation is shown below:

|   |   |
|---|---|
| <i>Actuarial cost method</i>                                | Entry Age Normal.   |
| <i>Amortization method</i>                                  | <p>The UAL is amortized as a level percentage of combined payroll.</p> <p>The OPSRP UAL as of December 31, 2007 and experience in each subsequent biennium is amortized over a closed 16 year period.</p> <p>The Retiree Healthcare UAL as of December 31, 2007 and experience in each subsequent biennium is amortized over a closed 10-year period. If a Retiree Healthcare program is over 100% funded the actuarial surplus is amortized over a rolling 20-year period over Tier One/Tier Two payroll.</p> <p>Senate Bill 1049 was signed into law in June 2019 and required a one-time re-amortization of Tier One/Tier Two UAL over a closed 22-year period at the December 31, 2019 rate-setting actuarial valuation, which set actuarially determined contribution rates for the 2021-2023 biennium. Future Tier One/Tier Two gains and losses between subsequent odd-year valuations will be amortized as a level percentage of projected combined valuation payroll over a closed 20-year period.</p> |
| <i>Asset valuation method</i>                               | Market value of assets, excluding reserves.   |
| <i>Contribution rate stabilization method (rate collar)</i> | <p>The contribution rate stabilization method, also referred to as the rate collar, is applied separately to OPSRP and to each Tier One/Tier Two experience sharing pool (State and Local Government Rate Pool, School Districts) and independent employer. The UAL Rate contribution rate component is confined to a collared range based on the prior biennium's collared UAL Rate and a defined collar width. The UAL Rate is not allowed to decrease if the funded status of the rate pool or employer is 87% or lower. The rate collar does not limit the change in the normal cost rate or changes for individual employers related to side accounts.</p>   |

### Economic Assumptions

A brief summary of the key economic assumptions used in this valuation is shown below:

|                                |  |
|--------------------------------|--|
| <i>Investment return</i>       | 6.90% compounded annually on system assets.  |
| <i>Interest crediting</i>      | <p>6.90% compounded annually on members' regular account balances.</p> <p>6.90% compounded annually on members' variable account balances.</p> |
| <i>Inflation</i>               | 2.40% per year.  |
| <i>Payroll Growth</i>          | 3.40% per year.  |
| <i>Healthcare cost trend</i>   | Ranging from 6.6% in 2023 to 3.8% in 2074.   |
| <i>Administrative Expenses</i> | \$64 million per year is added to the total system normal cost and allocated between Tier One/Tier Two and OPSRP based on valuation payroll.   |

# Brief Summary of Actuarial Methods and Assumptions

## Changes Since Last Valuation

The key changes since the December 31, 2022 actuarial valuation are described briefly below and are described in additional detail in the system-wide actuarial valuation report.

### ***Changes in Actuarial Methods and Allocation Procedures***

There were no changes in actuarial methods and allocation procedures since the December 31, 2022 actuarial valuation. A complete summary of the Tier One/Tier Two, OPSRP, RHIA, and RHIPA actuarial methods and allocation procedures is provided as part of the system-wide actuarial valuation report.

### ***Changes in Assumptions***

The retirement assumptions for OPSRP Police and Fire members were revised to estimate possible changes in retirement patterns that could arise from the plan changes included in House Bill 4045. There were no other changes in assumptions since the December 31, 2022 actuarial valuation. A complete summary of the Tier One/Tier Two, OPSRP, RHIA, and RHIPA assumptions is provided as part of the system-wide actuarial valuation report.

## Brief Summary of Changes in Plan Provisions

House Bill 4045 from the 2024 legislative session lowered the normal retirement age for OPSRP Police Fire from age 60 to 55, effective January 1, 2025. Members still qualify for earlier unreduced retirement if age 53 with 25 or more years of service. This plan change is reflected in the December 31, 2023 actuarial valuation.

There were no other changes in plan provisions reflected since the December 31, 2022 actuarial valuation. A complete summary of the Tier One/Tier Two, OPSRP, RHIA, and RHIPA plan provisions valued is provided as part of the system-wide actuarial valuation report.

# Glossary

## **Actuarial Accrued Liability**

The portion of the present value of prospective benefits allocated to service and compensation before the valuation date in accordance with the actuarial cost method.

## **Actuarial Asset Value**

The value of assets used in calculating the required contributions. The actuarial asset value may be equal to the fair market value of assets, or it may spread the recognition of certain investment gains or losses over a period of years in accordance with an asset valuation method.

## **Actuarial Assumptions**

Assumptions as to the occurrence of future events affecting pension costs, such as: mortality, withdrawal, disablement and retirement, rates of investment earnings, and other relevant items.

## **Actuarial Cost Method**

Sometimes called "funding method," a particular technique used by actuaries to establish the amount and incidence of the annual actuarial cost of pension plan benefits, or normal cost, and the related unfunded actuarial accrued liability. Ordinarily, the annual contribution to the plan comprises the normal cost and an amount for amortization of the unfunded actuarial accrued liability.

## **Actuarial Gain or (Loss)**

A measure of the difference between actual experience and that expected based upon a set of actuarial assumptions, during the period between two actuarial valuation dates, as determined in accordance with a particular actuarial cost method.

## **Actuarially Determined Contribution (ADC)**

A potential payment to a pension plan determined by an actuary which is developed using an actuarial cost method and may use an amortization method, asset valuation, method, and/or an output smoothing method. The ADC for a plan may or may not be the amount actually paid by the plan sponsor or other contributing entity.

## **Combined Valuation Payroll**

Projected payroll subject to PERS employer contribution rates for the calendar year following the valuation date for both Tier One/Tier Two and OPSRP active members. This payroll is used to calculate UAL rates.

## **Employer Contribution Rate**

Consists of the normal cost rate and the UAL rates, plus adjustments for other items such as side account rate offsets.

## **Funded Status**

The actuarial value of assets expressed as a percentage of the actuarial accrued liability.

## **Normal Cost**

The annual cost allocated to the current year under the actuarial cost method in use. The normal cost divided by the applicable payroll is the normal cost rate.

## **OPSRP Valuation Payroll**

Projected payroll subject to PERS employer contribution rates for the calendar year following the valuation date for OPSRP active members. This payroll is used to calculate OPSRP normal cost rates.

# Glossary

## **Pre-SLGRP Liability/(Surplus)**

The sum of Pre-SLGRP Pooled Liabilities and Transition Liabilities.

## **Pre-SLGRP Pooled Liability/(Surplus)**

The difference between the total UAL and the UAL attributable to the SLGRP for a pool of employers that joined the SLGRP. There are currently two pre-SLGRP pools. One was created for State Agencies and Community Colleges when the SLGRP was formed. The other one was created when the Local Government Rate Pool joined the SLGRP.

## **Present Value**

Sometimes called “actuarial present value,” the estimated cost (as of the valuation date) of a series of future payments. The present value is determined by discounting the future payments at a predetermined rate of interest, taking into account the probability of payment.

## **Rate Collar**

A contribution rate setting methodology that defines the maximum biennium-to-biennium change in the UAL contribution rate for a given experience-sharing pool.

## **Required Supplementary Information (RSI)**

Schedules, statistical data, and other information that are an essential part of financial reporting and should be presented with, but are not part of, the basic financial statements of a governmental entity.

## **Statement No. 68 of the Governmental Accounting Standards Board (GASB 68)**

The accounting standard governing a state or local governmental employer’s accounting for pensions. The standard replaced GASB 27 for fiscal years beginning after June 15, 2014.

## **Statement No. 75 of the Governmental Accounting Standards Board (GASB 75)**

The accounting standard governing a state or local governmental employer’s accounting for post-employment benefits other than pensions. The standard replaced GASB Statement 45 for fiscal years beginning after June 15, 2017.

## **Tier One/Tier Two Valuation Payroll**

Projected payroll subject to PERS employer contribution rates for the calendar year following the valuation date for Tier One and Tier Two active members. This payroll is used to calculate the Tier One/Tier Two normal cost rates.

## **Transition Liability/(Surplus)**

The difference between the total UAL and the UAL attributable to the SLGRP for an individual employer that joined the SLGRP or the Local Government Rate Pool. The initial balance of liability or surplus is calculated at the time an employer joins the pool. That balance is then amortized over time via employer contribution rate charges (for a liability) or rate offsets (for a surplus).

## **Unfunded Accrued Liability (UAL)**

The excess of the Actuarial Accrued Liability over the Actuarial Value of Assets. The UAL is divided by combined valuation payroll and an amortization factor to determine an initial pre-collar UAL rate. The final UAL rate can be adjusted by the rate collar.



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## Lane County Certified Salary Comparison

### Top of Scale

| Rank  | District       | Cycle | Year  | Top Ed        | Top Salary  | Notes                                  |
|-------|----------------|-------|-------|---------------|-------------|--|
| 1.00  | Eugene 4J      | 24-27 | 24-27 | MA+45 Step 17 | \$94,125.15 | 24-27 bargaining complete – 5% annual  |
| 2.00  | South Lane     | 22-25 | 24-25 | MA+30 Step 19 | \$93,974.00 |  |
| 3.00  | Bethel         | 22-25 | 24-25 | MA+45 Step 17 | \$92,927.00 | Step range is 3 to 17 - Total 15 Steps |
| 4.00  | Mapleton       | 23-26 | 24-25 | MA+45 Step 5  | \$91,910.00 | Step range is 1 to 4 - Total 4 Steps   |
| 5.00  | Lane ESD       | 23-27 | 24-25 | MA+45 Step 16 | \$89,382.00 |  |
| 6.00  | Siuslaw        | 24-27 | 24-25 | MA+45 Step 15 | \$88,215.59 |  |
| 7.00  | Springfield    | 22-25 | 23-24 | MA+45 Step 16 | \$87,918.00 | Financial reopener bargaining          |
| 8.00  | Marcola        | 23-25 | 24-25 | MA+45 Step 15 | \$87,090.00 |  |
| 9.00  | Junction City  | 23-26 | 24-25 | MA+45 Step 17 | \$86,440.00 |  |
| 10.00 | Pleasant Hill  | 23-26 | 24-25 | MA+45 Step 15 | \$85,970.00 |  |
| 11.00 | Crow-Applegate | 23-25 | 24-25 | MA+30 Step 22 | \$84,749.91 | Step range is 8 to 22 - Total 15 Steps |
| 12.00 | Creswell       | 22-24 | 23-24 | MA+45 Step 18 | \$83,885.00 | Successor bargaining now               |
| 13.00 | McKenzie       | 23-25 | 24-25 | MA+45 Step 17 | \$81,724.00 |  |
| 14.00 | Lowell         | 23-24 | 23-24 | MA+45 Step 16 | \$78,645.00 | Successor bargaining now               |
| 15.00 | Blachly        | 21-26 | 23-24 | MA+36 Step 17 | \$77,625.00 | Financial reopener bargaining          |
| 16.00 | Fern Ridge     | 21-24 | 23-24 | MA+45 Step 15 | \$77,038.00 |  |

### Outside References

|                        |       |       |                       |             |
|------------------------|-------|-------|-----------------------|-------------|
| <i>Portland Public</i> | 22-25 | 24-25 | <i>Lane V Step 11</i> | \$99,834.00 |
| <i>Salem Keizer</i>    | 23-25 | 24-25 | <i>MA+45 Step 17</i>  | \$98,436.00 |
| <i>Bend-LaPine</i>     | 23-24 | 23-24 | <i>MA+45 Step 16</i>  | \$91,381.00 |



## Entry Level Salary

| Rank | District       | Cycle | Year  | Entry Ed  | Entry Salary | Notes                                  |
|------|----------------|-------|-------|-----------|--------------|--|
| 1    | Crow-Applegate | 23-25 | 24-25 | BA Step 8 | \$52,739.17  | Step range is 8 to 22 - Total 15 Steps |
| 2    | Mapleton       | 23-26 | 24-25 | BA Step 1 | \$50,500.00  | Step range is 1 to 4 - Total 4 Steps   |
| 3    | Siuslaw        | 24-27 | 24-25 | BA Step 1 | \$48,172.34  |  |
| 4    | Lane ESD       | 23-27 | 24-25 | BA Step 1 | \$46,308.00  |  |
| 5    | Eugene 4J      | 24-27 | 24-25 | BA Step 1 | \$46,230.45  | 24-27 bargaining complete – 5% annual  |
| 6    | Bethel         | 22-25 | 24-25 | BA Step 3 | \$46,048.00  | Step range is 3 to 17 - Total 15 Steps |
| 7    | South Lane     | 22-25 | 24-25 | BA Step 1 | \$45,025.00  |  |
| 8    | Marcola        | 23-25 | 24-25 | BA Step 1 | \$43,969.00  |  |
| 9    | Junction City  | 23-26 | 24-25 | BA Step 0 | \$42,848.00  |  |
| 10   | McKenzie       | 23-25 | 24-25 | BA Step 1 | \$42,775.00  |  |
| 11   | Pleasant Hill  | 23-26 | 24-25 | BA Step 1 | \$42,515.00  |  |
| 12   | Springfield    | 22-25 | 23-24 | BA Step 1 | \$42,103.00  | Financial reopener bargaining          |
| 13   | Creswell       | 22-24 | 23-24 | BA Step 1 | \$41,830.00  | Successor bargaining now               |
| 14   | Lowell         | 23-24 | 23-24 | BA Step 1 | \$40,688.00  | Successor bargaining now               |
| 15   | Fern Ridge     | 21-24 | 23-24 | BA Step 1 | \$40,121.00  |  |
| 16   | Blachly        | 21-26 | 23-24 | BA Step 1 | \$38,967.00  | Financial reopener bargaining          |

## Other References

|                 |       |       |               |             |
|-----------------|-------|-------|---------------|-------------|
| Portland Public | 22-25 | 24-25 | Lane I Step 1 | \$45,602.00 |
| Salem Keizer    | 23-25 | 24-25 | BA Step 1     | \$50,011.00 |
| Bend-LaPine     | 23-24 | 23-24 | BA Step 1     | \$45,238.00 |