

Board of Directors Meeting
 School District 4J, Lane County
 4J Education Center / Hybrid (in-person or via Zoom)
 200 North Monroe Street
 Eugene, Oregon 97402
 Wednesday, April 16, 2025

NOTICE: The Regular Board Meeting at 6:00 p.m. will be open to the public to attend in person, via live broadcast on KRVM 1280-AM and 98.7 FM, on the internet at <https://icecast.4j.lane.edu/board> and via Zoom Webinar at <https://4j-lane-edu.zoom.us/j/91225128314>, Webinar ID: 912 2512 8314

School Board Meeting Request Forms:

Sign up to provide public comment: www.4j.lane.edu/board/publiccomment

The board will hear public testimony in person or via Zoom from community members who sign up in advance. Up to 10 people will be scheduled to provide public comment at each regular meeting. Priority will be given to residents who have not recently provided public comment in a board meeting.

Requests to provide public comment must be submitted no later than 5 p.m. on the Monday before the meeting.

6:00 PM

Regular Meeting

- I. **6:00 p.m. Regular Board Meeting:**
- II. Call to Order, Roll Call, Land Acknowledgment
- III. Agenda Approval
- IV. Introduction of Guests and Superintendent's Report
- V. Receive Reports from High School Student Representatives
- VI. Items Raised by the Audience
- VII. Comments by Employee Groups

- VIII. **Consent Group - Items for Action**
- 1. Approve the Draft 4J School District Board Minutes for: 4
 02/19/2025 4J Regular Board Meeting Minutes Draft
 02/25/2025 4J Special Board Meeting Minutes Draft
 03/05/2025 4J Regular Board Meeting Minutes Draft
 04/02/2025 4J Special board Meeting Minutes Draft
- 2. Ed Center Rooftop Mechanical Equipment Install 31
 Presenter: Ryan Spain, Director of Facilities
- 3. Bond Project – Multi Site Playground Improvements 32
 Presenter: Ryan Spain, Director of Facilities
- 4. Bond Project – Coburg Community Charter Elementary School Roofing 33
 Presenter: Ryan Spain, Director of Facilities
- 5. Bond Project – Multi Site Paving Improvements 34
 Presenter: Ryan Spain, Director of Facilities
- 6. Approve the Replacement of 4J's Core Network Infrastructure, Including 35
 the WIFI Infrastructure
 Presenter: Steve Menachemson, Director of Technology
- 7. Approval of the 2025 Eugene School District 4J Supplemental Busing 36
 Plan
 Presenter: Arthur Hart, Director of Transportation
- 8. Approve Tyler Technologies School ERP (Enterprise Resource Planning) 108
 Pro Contract, Statement of Work, and Projected Timeline
 Presenter: Matt Brown, Director of Finance
- 9. Approve Employment Contract for Incoming Superintendent Dr. Miriam 188
 Mickelson
 Presenter: Judy Newman, Board Director

IX.	Items for Information	
	1. Willagillespie Elementary School Choir Performance Presenter: Mary Poppen, Willagillespie Music Teacher and Choir Director 10 Minutes	190
	2. Informational Presentation on School Safety Presenters: Jennifer Bills, Director School Safety and Emergency Management Brooke Wagner D.Ed., Assistant Superintendent of Administrative Services 20 Minutes	191
	3. Community Engagement Committee: Report out on Community & Student Chats Presenters: Ericka Thessen, Board Director Carmen X. Urbina, Chief of Staff 20 Minutes	210
X.	Items for Action	
	1. Integrated Guidance (IG) Plan / Application Presenters: Larry Williams, Assistant Superintendent of Instruction Judy Jesiah, State & Federal Grant Manager – IG 5 Minutes	247
	2. K-10 Core Mathematics Curriculum Adoption Presenters: Erin Gaston, Elementary Curriculum Administrator Courtney Leonard, Secondary Curriculum Administrator 5 Minutes	248
XI.	Items for Action at a Future Meeting	
	1. Approve Adoption of Middle and High School Science Curriculum Presenters: Sarah Kirby, Secondary Science Context Specialist Teacher on Special Assignment (TOSA) Courtney Leonard, Secondary Curriculum, MTSS Administrator 10 Minutes	251
	2. Readopt Elementary and Secondary Health Curriculum Through 2032 Presenters: Erin Gaston, Elementary Curriculum & MTSS Administrator Courtney Leonard, Secondary Curriculum & MTSS Administrator 10 Minutes	294
	3. Set Student Transfer Limits as per Policy JECB (First Read) Presenter: Carmen Xiomara Urbina, Chief of Staff 10 Minutes	311
	4. Consider for Approval Revisions to Policy KBA – Public Records** (First Read) Presenter: Christine Nesbit, General Counsel 10 Minutes	333
	5. Consider for Approval Revisions to Policy GBEA – Workplace Harassment (First Read) Presenter: Christine Nesbit, General Counsel 10 Minutes	337
	6. Consider for Adoption Policy JGA – Corporal Punishment (First Read) Presenter: Larry Williams, Assistant Superintendent for Instruction and Access 10 Minutes	342
	7. Consider for Adoption Policy EBC – Emergency Plan and First Aid** (First Read) Presenter: Jennifer Bills, Director of School Safety and Emergency Management 10 Minutes	345

8. Approve Revisions to Board Policy BDDH – Public Comments at Board Meetings (First Read) 350
Presenter: Colt Gill, Interim Superintendent
15 Minutes

- XII. Comments by Individual Board Members
XIII. Suggestions by the Board for Consideration of Items at a Future Meeting
XIV. Adjourn

INTERPRETERS FOR THE DEAF AND HARD OF HEARING:

To request interpreter services for this meeting, please call (541) 790-7850 or TDD (541) 790-7712 or the TDD Relay Number 1 (800) 735-2900



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

April 16, 2025

Title

Approve the Draft 4J School District Board Meeting Minutes for the following:

02/19/2025 4J Regular Board Meeting

02/25/2025 4J Special Board Meeting

03/05/2025 4J Regular Board Meeting

04/02/2025 4J Special Board Meeting

Background

The board minutes listed above are in draft form. Once approved, the minutes will be uploaded to BoardBook and available to the public.

**MINUTES OF THE WORK SESSION
OF THE BOARD OF DIRECTORS
SCHOOL DISTRICT 4J, LANE COUNTY, OREGON**

Date: February 19, 2025

The Board of Directors (BOD) of School District No. 4J, Lane County, Oregon, held a work session at 6:00 p.m. in-person at the Education Center, 200 North Monroe Street in Eugene, Oregon, via live-stream and broadcast on KRVM. Notice of the meeting was emailed to the media and posted on the 4J website on February 14, 2025.

ROLL CALL

BOARD MEMBERS PRESENT:

Jenny Jonak, Chair
Tom Di Liberto, Vice Chair
Maya Rabasa
Ericka Thessen
Judy Newman
Morgan Munro
Rick Hamilton

BOARD MEMBERS ABSENT:

None.

STAFF:

Colt Gill, Interim Superintendent
Carmen Xiomara Urbina, Chief of Staff
Kelly McIver, Communications Director
Jen Bills, Director of School Safety and Emergency Management
Casandra Kamens, Curriculum Administrator and Charter School Liaison
Brooke Wagner, Assistant Superintendent for Administrative Services
Lisa Fjordbeck, Operations Coordinator for the Superintendent's Office
Cynthia Calletano, Executive Assistant to the Chief of Staff and Board
Debbie McKim, Executive Assistant to the Interim Superintendent and Board

STUDENT REPRESENTATIVES:

None.

EMPLOYEE GROUPS:

Lisa Jenkins-Easton, Oregon School Employees Association (OSEA)

OTHER GUESTS:

Christine Nesbit, General Counsel
Sharon Marino, Upbeat Leadership Coach (online)

Kylie Shapiro-Davis, Upbeat COO (online)
Justine Martinez, Upbeat Program Manager (online)

MEDIA:

KRVM

Register Guard (online)

I. CALL TO ORDER, ROLL CALL, AND LAND ACKNOWLEDGEMENT

Chair Jonak called the work session to order at 6:08 p.m. She said the names of the board members who were present and read the land acknowledgement statement.

II. AGENDA APPROVAL

The agenda was approved as presented.

III. COMMENTS BY EMPLOYEE GROUPS

Oregon School Employees Association (OSEA) President Lisa Jenkins-Easton acknowledged that the Memorandum of Agreement (MOA) with OSEA for transportation employees (Item 2 on the consent agenda) was completely quickly. She thanked the district on behalf of transportation department employees and added that hopefully the recruitment efforts will go well.

IV. CONSENT GROUP – ITEMS FOR ACTION

1. APPROVE THE DRAFT 2025-27 LANE EDUCATIONAL SERVICE DISTRICT (ESD) LOCAL SERVICE PLAN

There was no discussion.

2. APPROVE THE MEMORANDUM OF AGREEMENT WITH OSEA CHAPTER 1 – TRANSPORTATION, RECRUITMENT, RETENTION, REFERRAL, AND RECOGNITION

Chair Jonak expressed appreciation to OSEA on behalf of the Board of Directors (BOD) for making the MOA possible for transportation. She said they recognize how important transportation staff are to Eugene School District 4J and its students. She said they are grateful for the agreement and the leadership that made it possible.

3. APPROVE BOND PROJECT – MULTI-SITE SECURITY VESTIBULES

There was no discussion.

4. APPROVE BOND PROJECT – MULTI-SITE SECURITY FENCING

There was no discussion.

MOTION: Vice Chair Di Liberto moved to approve the consent group. Ms. Munro seconded. **Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Thessen, Ms. Newman, Ms. Munro, and Mr. Hamilton all voting in favor.**

V. ITEMS FOR INFORMATION

1. RECEIVE A REPORT ON THE UPBEAT STAFF SURVEY

Assistant Superintendent for Administrative Services Brooke Wagner, Sharon Marino, Upbeat Leadership Coach, (online), Kylie Shapiro-Davis, Upbeat COO (online), and Justine Martinez, Upbeat Program Manager (online) provided a report on the Upbeat Staff Survey via PowerPoint presentation.

Ms. Wagner provided background information, explaining that the district has been in partnership with Upbeat for the past two and a half years. Upbeat supports the district by gathering data (e.g. teacher and staff surveys) twice per year to inform goals and decision-making.

Ms. Martinez, Ms. Marino, and Ms. Shapiro-Davis introduced themselves and provided relevant personal background information.

Ms. Shapiro-Davis explained that Upbeat was informed by a team of professors who identified the key areas that impact teacher and employee retention within K-12 school districts and developed research-backed surveys. She said that Upbeat partners with school districts to administer the surveys. After the surveys are administered, they develop an action plan and provide coaching to administrators and principals. She pointed out that all their coaches are former principals or administrators. Coaches identify bright spots in the data as well as areas to be improved upon. She reported that 98% of district leaders said that meeting with an Upbeat leadership coach helped them accomplish their goals as leaders.

Ms. Shapiro-Davis outlined Upbeat improvement cycle, as follows:

1. Survey
2. Analysis
3. Dialogue
4. Support
5. Action

Ms. Shapiro-Davis introduced a table titled “Survey Domains and Retention,” highlighting that when positive perceptions of belonging and wellbeing increase by 10% at a school, individual teacher retention increases by 5.5%. In other words, as the Upbeat engagement scores increase, teacher retention rates increase. They have also identified a link between Upbeat engagement scores and higher student achievement.

Regarding Eugene School District 4J, Upbeat and the district began their partnership in Fall 2022. Surveys were administered through Fall 2024. District survey participation rates have ranged between 46% and 78%. Participation rates for teachers, as opposed to other staff, were most consistent.

Ms. Marino highlighted data revealing 4J teacher strengths. For teachers, the average engagement score is 73. The top three areas to celebrate include satisfaction and purpose, teacher voice and leadership, and equal opportunities. She noted that satisfaction and purpose is one of the top three indicators that impact teacher retention and equal opportunities is of the top five indicators.

She highlighted data revealing school-based staff strengths. For school-based staff, the average engagement score is 69. The top three areas to celebrate include belonging and wellbeing, satisfaction and purpose, and equal opportunities.

She highlighted data revealing department-based staff strengths. For department-based staff, the average engagement score is 63. The top three areas to celebrate include belonging and wellbeing, satisfaction and purpose, and equal opportunities.

Ms. Munro requested that longitudinal data be shared with the BOD in the future.

Ms. Wagner responded affirmatively.

Ms. Marino highlighted data revealing areas of opportunities for teachers, school-based staff, and department-based staff. The top two areas of opportunity are professional development and appreciation. She noted that both professional development and appreciation have less impact on teacher retention and satisfaction. She noted that 68% of teachers, 62% of school-based staff, and 49% of department-based staff agreed that when they are recognized publicly, they do outstanding work.

Ms. Marino highlighted data revealing teacher growth from Fall 2023 through Fall 2024. She brought attention to reported increases in the following areas: school safety and order, work/life balance, and belonging and wellbeing. 15 of the 18 categories improved over that time period.

Ms. Marino said that concerning district middle schools, professional development was identified as an area of opportunity. Regarding district elementary schools, appreciation was identified as an area of opportunity. As a response to the needs identified, Upbeat coaches, alongside principals, successfully developed key strategies to increase professional development opportunities and appreciation within the schools.

Ms. Martinez reported that principal and supervisor feedback revealed that 100% agree that Upbeat reports are high quality, 100% agree that Upbeat is responsive to questions and concerns, and 88% agree that Upbeat coaching is helpful.

She mentioned that district staff will be surveyed again in Spring 2025. Following that, Upbeat will share the results with the executive cabinet and meet with principals to review the results.

Ms. Marino invited questions from the BOD.

Vice Chair Di Liberto requested a fuller set of data, specifically the questions posed in surveys. He suggested sharing the data with staff members.

Ms. Wagner explained that the data is already being used by principals to create their school continuous improvement plans.

Interim Superintendent Gill pointed out that the Upbeat team supports the principals in reporting data back to staff members.

Ms. Munro asked if there was any refining feedback or frustration provided on behalf of staff as it relates to the Upbeat surveys.

Ms. Shapiro-Davis said they received feedback regarding the timing (i.e. time of year) of the surveys.

Ms. Martinez added that they are working on improving communications and clarity.

Ms. Munro asked how long it takes to fill out the survey.

Ms. Martinez responded that the survey takes ten to fifteen minutes.

Ms. Newman asked how many questions are in the survey.

Ms. Wagner responded that there are roughly 60 questions in the survey. She added that it is voluntary and anonymous.

Chair Jonak asked if they are equally focusing on areas of improvement for all teachers and departments.

Ms. Wagner confirmed that they are.

Ms. Rabasa asked if the district knows why the department-based staff tend to participate at a significantly lower rate.

Ms. Shapiro-Davis responded that it appears that typically departmental staff include transportation or cafeteria workers who may not have access to a district laptop or might not be checking their emails often. The Upbeat survey is accessible on a mobile phone.

Ms. Wagner added that it is an area of opportunity for the district.

Ms. Rabasa asked the survey includes open-ended questions.

Ms. Shapiro-Davis responded that traditionally it does not.

Ms. Rabasa asked if the district has compared engagement scores and possible increases with teacher rates and/or student success.

Ms. Wagner cited retention data included in the cover sheet, she said they have not, but can, do a cross reference with student data.

Chair Jonak thanked Ms. Wagner and the Upbeat team.

**2. CHARTER SCHOOL ANNUAL REVIEWS FOR THE FOLLOWING:
COBURG COMMUNITY CHARTER SCHOOL, NETWORK CHARTER
SCHOOL, RIDGELINE MONTESSORI PUBLIC CHARTER SCHOOL, TWIN
RIVERS CHARTER SCHOOL, VILLAGE PUBLIC CHARTER SCHOOL**

Curriculum Administrator and Charter School Liaison Casandra Kamens presented information related to charter school sponsor responsibilities via PowerPoint presentation.

Ms. Kamens explained that the district has sponsored charter schools since the year 2000. Charter schools are operated by a group of parents, teachers, and/or community members as a semi-autonomous school of choice within a school district. It is given the opportunity to operate under a contract or “charter” between the members of the charter school community and the local board of education (sponsor).

Charter schools are subject to certain laws pertaining to school district public schools and must operate consistently with the charter agreement. She referenced ORS Chapter 338 and ORS Chapter 581. She said that charter schools have their own school board and policies and for the most part funding goes through the district.

Interim Superintendent Gill added that in Oregon all charter schools are public charter schools.

Ms. Kamens reminded the BOD of 4J’s charter schools: Ridgeline Montessori, Village School, Coburg Community, Network, and Twin Rivers.

She outlined the following Administrative Rules (ARs) regarding charter schools: looking over new charter proposals, annual charter agreement review, charter school renewal and/or termination.

Charter school council includes a charter school liaison, student services department administrator, Director of Data and Research, Associate Director of Finance, Assistant Superintendent of Youth and Family Services, and a 4J BOD representative. The charter council meets quarterly with all charter schools, visit sites annually, and facilitates renewals as needed.

Ms. Kamens described the core sponsoring district oversight requirements:

1. Academic Program Oversight
2. Contract and Legal Compliance
3. Special Education Services
4. Financial Oversight
5. Annual Evaluation Process

Ms. Kamens detailed the annual charter review process, as follows: financial reporting, academic performance, annual school visit, self-reflection and SIP (school improvement plan), and self-assessment. Ms. Kamens then puts together individual annual reviews to present to the BOD. Annual reviews are typically presented near the start of the calendar year. They include the following components: SIP summary, goals for next year's SIP, state school report card, site visit summary, financial review, contractual agreements, findings, commendations, and recommendations, and data appendix.

Vice Chair Di Liberto asked if a student has an Individualized Education Program (IEP) that requires a self-contained classroom, is the student less likely to receive those services at a charter school?

Ms. Kamens replied that they would conduct a placement review to ensure that the charter school has/can provide what is necessary. She said it is possible that a charter school would not be a good fit. She added that there is language in the contract to ensure that students with IEPs can receive the services necessary.

Vice Chair Di Liberto asked if that is different from district non-charter schools.

Ms. Kamens said that from her experience as an administrator there is always a question of whether a school can provide services for a student in a certain location. Thus, there is always a placement review/meeting.

Chair Jonak brought attention to achievement gaps between disabled students and the general population. She asked how the district is partnering with charter schools to help.

Ms. Kamens responded that it is not her area of expertise but mentioned that the district works closely with educators and Educational Assistants (EAs).

Interim Superintendent Gill added that charter schools receive accommodations and modifications throughout the school day as prescribed in IEPs. He said there is probably room for more collaboration around special education. He mentioned that charter schools are designed to inform school districts to improve their outcomes through experimental models and reiterated that there is more space for the district to learn from and support charter schools.

Ms. Munro asked Ms. Kamens to speak to the difference between graduation rates at district charter school high schools.

Ms. Kamens responded that both district charter high schools are small. Twin Rivers has 60 students, with a senior class of typically 12 students. She said when 12 students represent 100% of the data, all it takes is one of the students to drop the graduation rate significantly. She added that higher mobility rates (i.e. students moving in and out) do impact the score.

Ms. Munro asked about credit recovery at charter schools.

Ms. Kamens responded that there is a high school extended day program for students to participate in credit recovery classes. They are currently in conversation about a summer credit recovery program in-person and/or in addition to online.

Ms. Newman asked how the number of 4J charter schools compare with other districts.

Ms. Kamens responded that she does not know.

Ms. Newman asked for clarification regarding the frequency of charter school reviews.

Ms. Kamens responded that if a charter school was not in compliance with the contract, the annual review would be an opportunity to address it. Other than the annual review, there is the five-year renewal. She added that at any point in time, terminations may be considered.

Ms. Kamens ended by stating that while charter high school data does not always look great, she has witnessed significant effort and progress over the past four years.

Ms. Munro and Ms. Thessen both commented on the positive feedback they received and the positive interactions they witnessed during site visits to district charter schools.

VI. ITEMS FOR ACTION

1. ADOPT POLICY KJG – TRIBAL CONSULTATION

Interim Superintendent Gill recommended a change in language from Native American/Alaskan Native (NAAN) to American Indians/Alaskan Natives (AIAN) in Policy KJG – Tribal Consultation.

MOTION: Vice Chair Di Liberto moved to approve Policy KJG as amended. Mr. Hamilton seconded. **Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Thessen, Ms. Newman, Ms. Munro, and Mr. Hamilton all voting in favor.**

2. ADOPT NEW BOARD POLICY EBCA – SAFETY THREATS

Director of School Safety and Emergency Management Jen Bills recommended one amendment (removing lockouts) and the adoption of Policy EBCA – Safety Threats.

MOTION: Ms. Munro moved to approve Policy EBCA as amended. Ms. Thessen seconded. **Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Thessen, Ms. Newman, Ms. Munro, and Mr. Hamilton all voting in favor.**

3. APPROVE REVISIONS TO BOARD POLICY EBCB – EMERGENCY PROCEDURE DRILLS AND INSTRUCTION (SECOND READ)

Ms. Bills recommended the adoption of Policy EBCB – Emergency Procedure Drills and Instruction.

Ms. Bills noted that the only change was removing terminology related to lockouts.

Ms. Rabasa requested definitions related to the policy, particularly for parents. She said the request is based off feedback previously provided by parents.

Interim Superintendent Gill responded that he is nervous about the terms being in policy as the terms change over time. He suggested that the terms go into an AR where they can be updated quickly. He added that when a school goes into a status, district protocol is to notify the families, including providing definitions.

Ms. Munro noted that some relevant information is listed on the district website.

MOTION: Ms. Rabasa made a motion to postpone approving revisions to Policy EBCB. Ms. Thessen seconded. **The motion passed 5:2:0; Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Thessen, Ms. Newman voting in favor; Ms. Munro and Mr. Hamilton voting against.**

4. APPROVE REVISIONS TO POLICY GCDA/GDDA – CRIMINAL RECORDS CHECK AND FINGERPRINTING (SECOND READ)

Ms. Bills introduced revisions to Policy GCDA/GDDA – Criminal Records Check and Fingerprinting. The revision relates to associated fees, specifically that fingerprinting fees shall be paid for by the individual and criminal records checks shall be paid for by the district.

MOTION: Ms. Munro moved to approve revisions to Policy GCDA/GDDA. Ms. Thessen seconded. **Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Thessen, Ms. Newman, Ms. Munro, and Mr. Hamilton all voting in favor.**

VII. ITEMS FOR ACTION AT A FUTURE MEETING

1. CONSIDER FOR APPROVAL REVISIONS TO POLICY KL—PUBLIC COMPLAINTS (FIRST READ)

Chief of Staff Carmen Xiomara Urbina and General Counsel Christine Nesbit presented revisions to Policy KL – Public Complaints via PowerPoint presentation.

Ms. Urbina explained changes to the public complaint process are being recommended not only to center students but to align with legal compliance, provide further clarity and accessibility, reflect the district’s commitment to equity, transparency, and accountability, and to ensure that the BOD, rather than the superintendent, adopts procedures for complaints against Board members or the superintendent.

Ms. Urbina said the new policy focuses on building trust, removing barriers, aligning with Division 22 standards, and strengthening oversight. She added that the new policy aligns with 4J's core values of respect and dignity, relationships and accessibility, honesty and transparency, integrity and accountability, and equity and fairness.

Ms. Nesbit spoke about the importance of making the complaint process visible on the district website. She described key changes to Policy KL, including that the former policy did not contain a values statement and placed emphasis on a "universal" complaint procedure. They are proposing explicitly stating that the district will apply unique procedures when appropriate.

She said the former policy contained outdated references to complaint types that could be appealed to the Oregon Department of Education (ODE). The new policy updates references and ensures fact-finding and timelines.

Ms. Nesbit explained that the former policy created a default 4-step complaint escalation process up to Board *unless* the procedure KL-AR specified otherwise. The new policy directs that the AR will allow consideration of complaint at the appropriate level of accountability.

She said the former policy provided that complaints against the superintendent be referred to the Board Chair on behalf of the Board. The new policy is a correction to governance.

Ms. Nesbit explained that the former policy did not contain details about processing complaints against the Board or individual members nor did it define complaint types. The new policy acknowledges that Board members are elected officials and that accountability for actions and policy positions lies with voters, including the use of legal counsel or a third-party investigator.

She said the former policy included timelines for complaint filing in AR, but not in policy. The new policy brings timelines for complaint filing into policy.

Ms. Nesbit added that they are considering an AR related to workplace complaints.

Ms. Urbina and Ms. Nesbit received policy language suggestions from the BOD.

VIII. ADJORN

Chair Jonak adjourned the work session at 9:00 p.m.

**MINUTES OF THE SPECIAL BOARD MEETING
OF THE BOARD OF DIRECTORS
SCHOOL DISTRICT 4J, LANE COUNTY, OREGON**

Date: February 25, 2025

The Board of Directors (BOD) of School District No. 4J, Lane County, Oregon, held a special board meeting at 8:30 p.m. in-person at the Education Center, 200 North Monroe Street in Eugene, Oregon, via live-stream and broadcast on KRVM. Notice of the meeting was emailed to the media and posted on the 4J website on February 24, 2025.

ROLL CALL

BOARD MEMBERS PRESENT:

Jenny Jonak, Chair
Tom Di Liberto, Vice Chair
Maya Rabasa
Ericka Thessen
Judy Newman
Morgan Munro
Rick Hamilton

BOARD MEMBERS ABSENT:

None.

STAFF:

Colt Gill, Interim Superintendent
Carmen Xiomara Urbina, Chief of Staff
Christine Nesbit, In House Counsel
Debbie McKim, Executive Assistant to the Interim Superintendent and Board

STUDENT REPRESENTATIVES:

None.

EMPLOYEE GROUPS:

None.

OTHER GUESTS:

None.

MEDIA:

KRVM

I. CALL TO ORDER AND ROLL CALL

Chair Jonak called the special board meeting to order at 8:34 p.m. She said the names of the board members who were present.

II. AGENDA APPROVAL

The agenda was approved as presented.

III. CONSIDERING LITIGATION

Chair Jonak explained that on February 14, 2025, Eugene School District 4J received a “Dear Colleague” letter from the United States Department of Education (DOE) setting a deadline of February 28, 2025, to eliminate diversity, equity, and inclusion (DEI) practices or face the loss of federal funding.

Chair Jonak declared that the notice is problematic on a number of levels. First, 4J is built on a commitment to help every student succeed. The district wants to remove obstacles and provide support so that every child, regardless of background, can reach their potential. 4J values the strength that comes from different perspectives, helping all feel invested, valued, connected, and engaged. She stated that diversity, equity, and inclusion are important values for ensuring that every student has a fair opportunity to succeed. The letter received from the DOE puts that mission at risk and calls for the district to move away from stated values. She said 4J’s first priority is the success of students, including marginalized students. She pointed out how problematic it is for the district to sacrifice any group of students in exchange for funding. Secondly, she said the guidance is vague and unclear as to what is considered equity-related versus diversity-related. As a result, it is impossible for the district to know what the government considers lawful and thus puts the district at risk. She added that state and federal rules do not line up.

Chair Jonak cited a recent federal court ruling weighing in on recent executive orders, specifically that the orders fail to define key terms and identify the types of programs or policies that the administration considers illegal.

Chair Jonak further stated that the federal directives are unconstitutional. She said it will be important for courts to consider the impact, as uncertainty about funding puts district operations and the ability to serve students and staff at risk. She explained that 4J has an opportunity to be part of a litigation as the first K-12 public school to challenge the DOE letter. If sought, the legal services would be provided pro-bono. Chair Jonak recommended that the Board of Directors (BOD) consider litigation to defend values, support staff, and protect students.

Ms. Munro expressed that as school board members it is their job to ensure that the district has clear, effective policies and prudent financial oversight. She said that having read the “Dear Colleague” letter, she does not know how the district would craft clear policies to set staff up for success. She mentioned confusion about direction and enforceability. She added that the letter comes with the threat of losing over \$20 million in federal funding for the district – funding tied to special education services, free lunch programs, transportation, and more. Ms. Munro expressed her support for joining the lawsuit to seek clarity and defend civil rights.

MOTION: Vice Chair Di Liberto moved to approve Eugene School District 4J joining a lawsuit to challenge the legality of the “Dear Colleague” letter from the Department of Education (DOE) and retain Democracy Forward to represent it on a pro-bono basis. Ms. Rabasa seconded. **The motion passed unanimously, 7:0:0; Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Newman, Ms. Thessen, Ms. Munro, and Mr. Hamilton all voting in favor.**

IV. ADJORN

Chair Jonak adjourned the special meeting at 8:43 p.m.

DRAFT

**MINUTES OF THE REGULAR BOARD MEETING
OF THE BOARD OF DIRECTORS
SCHOOL DISTRICT 4J, LANE COUNTY, OREGON**

Date: March 5, 2025

The Board of Directors (BOD) of School District No. 4J, Lane County, Oregon, held a regular board meeting at 6:00 p.m. in-person at the Education Center, 200 North Monroe Street in Eugene, Oregon, via live-stream and broadcast on KRVM. Notice of the meeting was emailed to the media and posted on the 4J website on February 28, 2025.

ROLL CALL

BOARD MEMBERS PRESENT:

Jenny Jonak, Chair (online)
Tom Di Liberto, Vice Chair
Maya Rabasa
Ericka Thessen
Judy Newman
Morgan Munro
Rick Hamilton

BOARD MEMBERS ABSENT:

None.

STAFF:

Colt Gill, Interim Superintendent
Carmen Xiomara Urbina, Chief of Staff
Matt Brown, Director of Financial Services
Lisa Fjordbeck, Operations Coordinator for the Superintendent's Office
Brooke Wagner, Assistant Superintendent for Administrative Services
Jen Bills, Director of School Safety and Emergency Management
Oscar Loureiro, Director of Research and Planning
Judy Jesiah, State and Federal Grant Manager
Christine Nesbit, General Counsel
Erin Gaston, Elementary Curriculum Administrator
Courtney Leonard, Secondary Curriculum Administrator
Jamie Tait, Elementary Math Specialist
Kate Marrone, Director of Human Services
Debbie McKim, Executive Assistant to the Interim Superintendent and Board

STUDENT REPRESENTATIVES:

Autumn Thessen, Early College and Career Options (ECCO)
Kristian Babcock, International High School (IHS) at Churchill High School

Kaleia Davis, Sheldon High School
Olivia Dodge, Churchill High School
Lane Lowd, Eugene Online Academy
Deeya Patel, South Eugene High School
Jazmine Berry, North Eugene High School

EMPLOYEE GROUPS:

Sabrina Gordon, Eugene Education Association (EEA)
Lisa Jenkins-Easton, Oregon School Employees Association (OSEA)
Gina Wilde, Managers, Administrators, Professionals, and Supervisors (MAPS)
Misty Jackson, MAPS
Nicholas Hadley, MAPS

OTHER GUESTS:

None.

MEDIA:

KRVM
Register Guard

I. CALL TO ORDER, ROLL CALL, AND LAND ACKNOWLEDGEMENT

Vice Chair Di Liberto called the regular board meeting to order at 6:00 p.m. He said the names of the board members who were present and read the land acknowledgment statement.

II. AGENDA APPROVAL

Vice Chair Di Liberto suggested postponing Items for Action at a Future Meeting Item No. 3. There were no objections. The agenda was approved as amended.

Vice Chair Di Liberto recognized Eugene School District 4J staff during Classified Staff Appreciation Week, highlighting the work of custodians, bus drivers, office staff, cafeteria workers, and Educational Assistants (EAs). He said their work often happens behind the scenes, but its impact is deeply meaningful for district students' ability to learn. He thanked classified staff for their hard work, dedication, patience, and commitment.

III. INTRODUCTION OF GUESTS AND SUPERINTENDENT'S REPORT

Interim Superintendent Gill apologized for a miscommunication regarding the Board of Directors (BOD) meetings with student high school advisory groups. He said that not all educators or program leaders were fully informed of meetings in a timely or clear manner. He added that the meetings serve as an opportunity for students to engage directly in meaningful dialogue with the BOD.

Interim Superintendent Gill recognized Classified Staff Appreciation Week and shared a personal story describing his background with classified school employees. He said the district tends to focus on their goal of increasing equitable outcomes for students, providing for the safety and well-being of students, and engaging the community. He said it is classified staff who ensure the district can function to make gains on those goals. Interim Superintendent Gill thanked classified staff for their many contributions.

IV. RECEIVE REPORTS FROM HIGH SCHOOL STUDENT REPRESENTATIVES

Kristian Babcock, International High School (IHS), thanked the BOD for their commitment to diversity, equity, and inclusion (DEI) despite recent federal threats. She said it is encouraging to see the district take legal action alongside national organizations to challenge federal threats against DEI funding. Ms. Babcock cited C-day complications including logistical challenges and short periods. She reported that their calendar has been changed three times, disrupting planning and causing confusion. She reiterated frustrations about incentive (i.e. food) restrictions.

Kaleia Davis, Sheldon High School, recounted Black History Month activities, a unified basketball game, and movie night. She highlighted Sheldon's upcoming Pink Prom and mentioned concerning data showing that a majority of queer students do not feel safe on campus. A Wellness Center with break spaces and support staff is under development. The Native American Student Union is planting a native garden throughout campus.

Olivia Dodge, Churchill High School, explained that having only one conference room has proven to be an issue for school clubs. She said that testing over the past two weeks has led to student stress, and a schedule shift on short notice led to discontent among employed students. Ms. Dodge said the Churchill Site Council is working on a grant in hopes of approving attendance rates. Their Spring Fling dance is happening on Saturday, March 15, 2025.

Lane Lowd, Eugene Online Academy, thanked Interim Superintendent Gill for his acknowledgement about the communication issue. He said Eugene Online Academy is setting up the necessary systems to be properly represented at the district level.

Deeya Patel, South Eugene High School, reported that students have been experiencing stress due to unexpected state graduation requirements. Personal finance, college readiness, civics, and economics courses are now required, but students were unaware and thus unable to plan accordingly. Students are requesting that the district address the issue by reconsidering the structure of the classes (students have outlined specific recommendations) and by communicating with students earlier and more clearly.

Jazmine Berry, North Eugene High School, said that their swim team had four athletes head to state. Wrestling had three athletes head to state, and one athlete won silver. The boys' and girls' basketball teams did great this season. Ms. Berry said that North's Martin

Luther King Jr. assembly was held on February 7, 2025. She mentioned challenges at the start of 2025, including former Principal Nain Muñoz's resignation.

Autumn Thessen, Early College and Career Options (ECCO), shared concern about their school building still not being adequate for students and staff. She thanked the BOD for affirming the rights of LGBTQIA2+ students, citing a resolution passed in January 2025. She also thanked the BOD for joining a lawsuit opposing the federal government's DEI mandate.

V. ITEMS RAISED BY AUDIENCE

Martha Dyer, Teacher Librarian at Chavez Elementary School, is part of a five-year pilot program to reinstate Teacher Librarians at 4J elementary schools. Ms. Dyer described the positive impacts of the pilot program. She said the Chavez Library collection has been updated to include a diverse selection of nonfiction and fiction books. The number of books checked out has tripled, as has students' enthusiasm for reading. Students are learning to utilize the library catalogue and call numbers to locate books on the shelves. She said the amazing things that are happening at Chavez Library are happening across the school district.

Amy Page, District Librarian, thanked the district for their support hiring Teacher Librarians. She explained that school libraries were lacking, but Teacher Libraries have ignited a love of reading. They have taught over 480 lessons and circulated over 30,000 more books than last year. She highlighted the challenges of having only part time librarians. Ms. Page added that librarians are dedicated professionals committed to doing what is best for students.

Jessica Harvey, Psychologist at 4J, spoke about the treatment of school psychologists and its impact on staff morale. She brought attention to a reported trend in the way people feel they are being treated by district administrators, specifically her colleagues in the student services department. She cited mileage documentation and IEP days, and said that staff are feeling unheard, unseen, and underappreciated. Regarding the district budget, she urged thinking about what matters most and leading with trust and respect for 4J professionals.

Carrie Bartlett, Occupational Therapist at 4J, provided comments related to the district's Human Resources (HR) department requesting detailed documentation for monthly mileage reimbursement requests, including documenting mileage site-to-site and adding a GPS image for each trip taken. She said the process is time-consuming and even more so when the HR department returns forms with payment denials and questions regarding the route taken. She described multiple factors that impact everyday travel. Ms. Bartlett recommended recording mileage in an analog format, which she said is an accepted method across the country.

Jerry Rosiek, Professor at University of Oregon, recited Pastor Martin Niemoller’s poem “First They Came” as a symbol of his support for the BOD’s decision to join a lawsuit pushing back against threats to withdraw federal funds from schools that do not cease DEI programming. He thanked the BOD for choosing action and not silence.

VI. COMMENTS BY EMPLOYEE GROUPS

Oregon School Employees Association (OSEA) President Lisa Jenkins-Easton provided comments. She reported providing testimony at the State Capitol. She highlighted classified staff, hiring issues, and transportation impacts. Regarding a recent decision to increase district reserves by 3%, Ms. Jenkins-Easton requested more transparency. She said the district’s most vulnerable colleagues attended staff meetings to inform them that FTE will be cut. She reported concern among classified and licensed staff. She asked how many millions of dollars they voted to save rather than retain valuable staff and fill open classified positions.

Managers, Administrators, Professionals, and Supervisors (MAPS) Representative Gina Wilde spoke on the topic of proposed budget reductions, emphasizing the impact on educators, staff, leaders, students, and families. She said that budget cuts no matter how carefully planned will impact staff, systems, and the ability to serve students in the way the district aspires to. She said no budget cut can take away the heart and commitment brought into schools every day. She thanked Interim Superintendent Gill, Chief of Staff Carmen Xiomara Urbina, and the BOD for their leadership and commitment to the district, students, and staff.

Eugene Education Association (EEA) President Sabrina Gordon acknowledged Classified Staff Appreciation Week and provided comments related to district budget cuts. She said that every school is facing cuts that will impact individuals and efforts to support students, based on \$25 million in reductions and while the district has enormous reserves. She asked if the district office (i.e. administrative staffing) is absorbing any of the planned reductions. She said it was unsettling for district staff to receive the news of budget cuts. She cited general dissatisfaction among staff members related to unreasonable wait times and lack of communication when raising serious concerns and formal complaints.

VII. CONSENT GROUP – ITEMS FOR ACTION

**1. APPROVE THE BOARD MEETING MINUTES DRAFT FOR:
FEBRUARY 5, 2025, REGULAR BOARD MEETING**

There was no discussion.

**2. BOND PROJECT – SOUTH EUGENE HIGH SCHOOL SOFTBALL FIELD
DRAINAGE IMPROVEMENTS**

There was no discussion.

3. APPROVE PERSONNEL ACTION

Ms. Rabasa requested postponing the approval of personnel action.

4. APPROVE THE REVISED 2024-25 BOARD MEETING CALENDAR

There was brief discussion.

MOTION: Ms. Rabasa moved to postpone consent agenda Item No. 3 – Approve Personnel Action. Seconded by Ms. Thessen. **The motion failed, 4:3:0; Chair Jonak, Ms. Rabasa, and Ms. Thessen voting in favor; Vice Chair Di Liberto, Ms. Newman, Ms. Munro, and Mr. Hamilton voting against.**

MOTION: Ms. Munro moved to approve the consent agenda as presented. Ms. Newman seconded. **The motion passed, 5:2:0; Vice Chair Di Liberto, Chair Jonak, Ms. Newman, Ms. Munro, and Mr. Hamilton voting in favor; Ms. Rabasa and Ms. Thessen voting against.**

VIII. ITEMS FOR INFORMATION

1. BUDGET PROCESS AND BUDGET COMMITTEE MEETINGS

Director of Financial Services Matt Brown provided an update about the budget process and budget committee meetings. A budget meeting is scheduled for Tuesday, March 11, 2025, followed by the first official Budget Committee meeting on Tuesday, April 15, 2025. The budget document is expected to be finalized by Friday, April 4, 2025.

2. RECEIVE UPDATED REPORT ON INCIDENTS RELATED TO 4J BOARD POLICY ACC, RACIAL HARRASSMENT

Director of Research and Planning Oscar Loureiro summarized incidents related to 4J Board Policy ACC, Racial Harassment via PowerPoint presentation.

There has been a total of 132 reports of bullying, harassment, discrimination, and bias incidents reported by students – down from 179 cases the previous year. However, reports by staff members have increased slightly. He presented a chart detailing the number of cases per district school. In most cases the person being harmed and the person allegedly causing the harm attend the same school.

Ms. Munro asked how complaints are processed.

Mr. Loureiro referenced a process called the Student Support Matrix.

Ms. Newman asked about the classification of student reported incidents; when students self-report, do they indicate if it is racial harassment, bullying, etc.?

Mr. Loureiro confirmed that the students do identify the type of incident. In most cases, they are unsure what an incident classifies as.

Vice Chair Di Liberto asked how the district navigates conversations with staff about the data. Are there specific questions that educators are asking about the data?

Mr. Loureiro said that would be an interesting topic to add to an existing staff survey.

Ms. Newman asked if the 106 students represent 106 individual students or if they are repeat students.

Mr. Loureiro responded that the cases tend to be different individuals.

Chair Jonak asked if they sense student and staff confidence regarding the effectiveness of the reporting.

Mr. Loureiro responded that they are unsure if the decline in incidents is because people are less inclined to report. He is in favor of a future survey.

Mr. Hamilton asked if they are tracking the dispositions of the incidents.

Mr. Loureiro responded that the district tracks dispositions through the Synergy Student Information System (SIS).

3. RECEIVE AN UPDATE ON THE SUPERINTENDENT SEARCH PROCESS FROM THE AD HOC SUPERINTENDENT SEARCH COMMITTEE

Ms. Newman provided an update on the Superintendent search process. She said the position for superintendent closed on February 10, 2025. Semi-finalists were selected on February 26, 2025, and were interviewed on March 3, 2025. They are now moving into the finalist interview phase of the superintendent search process. Community panel interviews are occurring on March 10, 2025, and BOD interviews will follow. The next 4J superintendent is expected to be announced in late March or early April.

4. RECEIVE AN UPDATE FROM THE COMMUNITY ENGAGEMENT BOARD SUBCOMMITTEE

Ms. Thessen reported that members of the Community Engagement Board Subcommittee are meeting with the Principal Student Advisory Committees and Student Board Representatives at district high schools.

IX. ITEMS FOR ACTION

1. APPROVE REVISIONS TO POLICY KL – PUBLIC COMPLAINTS

Chief of Staff Carmen Xiomara Urbina and General Counsel Christine Nesbit introduced revisions to Policy KL – Public Complaints. They are recommending deleting all the language in the current public complaints policy and adopting new language, which includes feedback received from the BOD during a previous meeting. Ms. Nesbit referenced a document provided in the meeting packet.

MOTION: Ms. Newman moved to approve revisions to Policy KL – Public Complaints. Seconded by Ms. Thessen. **The motion passed unanimously, 6:0:1; Chair Jonak, Vice Chair Di Liberto, Ms. Thessen, Ms. Newman, Ms. Munro, and Mr. Hamilton. Ms. Rabasa was not present.**

2. ADOPT NEW BOARD POLICY EBCA – SAFETY THREATS

Director of School Safety and Emergency Management Jen Bills recommended the adoption of Board Policy EBCA – Safety Threats.

MOTION: Ms. Munro moved to approve Policy EBCA – Safety Threats. Seconded by Mr. Hamilton. **The motion passed unanimously, 7:0:0; Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Thessen, Ms. Newman, Ms. Munro, and Mr. Hamilton.**

3. APPROVE REVISIONS TO BOARD POLICY EBCB – EMERGENCY PROCEDURE DRILLS AND INSTRUCTION

Ms. Bills recommended the adoption of Board Policy EBCB – Emergency Procedure Drills and Instruction.

MOTION: Ms. Newman moved to approve Policy EBCB – Emergency Procedure Drills and Instruction. Mr. Hamilton seconded. **The motion passed unanimously, 7:0:0; Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Thessen, Ms. Newman, Ms. Munro, and Mr. Hamilton**

X. ITEMS FOR ACTION AT A FUTURE MEETING

1. K-10 CORE MATHEMATICS CURRICULUM ADOPTION

Elementary Curriculum Administrator Erin Gaston, Secondary Curriculum Administrator Courtney Leonard, and Elementary Math Specialist Jamie Tait presented K-10 Core Mathematics Curriculum adoption via PowerPoint presentation. The new materials align with state standards and are a response to a reduction in math scores district and statewide.

Ms. Gaston introduced 4J's vision for math instruction:

1. Students see themselves in instructional materials
2. Students own the thinking
3. Students focus on the most important grade-appropriate content
4. Students build on what they already know

They utilized review criteria tools for piloting math curriculum. Educators had sufficient opportunities to share, ultimately selecting the following pilot curriculum: K-5: Bridges in Mathematics and Illustrative Mathematics; 6-8: MidSchoolMath and i-Ready; 9-10: Illustrative Mathematics and Open-Up.

The next step involved piloting the curriculum and collecting final educator ratings for all levels, as follows: K-5: Bridges in Mathematics; 6-8: Mid School Math (MSM); 9-10: Open-Up.

Educators requested a clear and cohesive plan and unit internalization. They requested structured time for collaboration, strong professional learning prior to implementation, and a year one plan to support teachers in implementing materials in manageable chunks.

A table detailing 7-year material costs revealed a grand total of \$3,791,161. Year 1 curriculum implementation (professional development) budget revealed a grand total of \$674,000. Year 2+ professional learning costs revealed a grand total of \$153,960.

The adoption team responded to questions from the BOD related to accessibility, individualized supports for students, professional development for educators, math pathways, technology needs, and dual language implementation.

2. INTEGRATED GUIDANCE (IG) 2025-27 BIENNIUM PLAN PRESENTATION

Mr. Loureiro and State and Federal Grant Manager Judy Jesiah presented information about Integrated Guidance (IG) 2025-27 Biennium Plan via PowerPoint presentation.

Ms. Jesiah said the documents detailing spending for the next biennium are also available in the Board Book. The preliminary funding stream is between \$45 million and \$47 million for the next biennium. It represents the braiding of four state grant funds and one federal fund. The application itself is comprised of the Eugene SD plan, biennium budgets, affirmation of tribal consultation, individual charter plans, and district charter partnership agreements (DCPA). They are seeking approval on the biennium plan by April 23, 2025.

XI. COMMENTS BY INDIVIDUAL BOARD MEMBERS

There were none.

XII. SUGGESTIONS BY THE BOARD FOR CONSIDERATION OF ITEMS AT A FUTURE MEETING

Ms. Thessen requested twice per year report with data on staff injuries to be provided in a Friday memorandum.

Ms. Newman requested updates on state and federal rules impacting mileage reporting to be provided in a Friday memorandum.

XIII. ADJORN

Chair Jonak adjourned the regular board meeting at 8:46 p.m.

DRAFT

**MINUTES OF THE SPECIAL BOARD MEETING
OF THE BOARD OF DIRECTORS
SCHOOL DISTRICT 4J, LANE COUNTY, OREGON**

Date: April 2, 2025

The Board of Directors (BOD) of School District No. 4J, Lane County, Oregon, held a special board meeting at 5:00 p.m. in-person at the Education Center, 200 North Monroe Street in Eugene, Oregon, via live-stream and broadcast on KRVM. Notice of the meeting was emailed to the media and posted on the 4J website on March 28, 2025.

ROLL CALL

BOARD MEMBERS PRESENT:

Jenny Jonak, Chair
Tom Di Liberto, Vice Chair
Maya Rabasa
Ericka Thessen
Judy Newman
Morgan Munro
Rick Hamilton

BOARD MEMBERS ABSENT:

None

STAFF:

Colt Gill, Interim Superintendent
Carmen Xiomara Urbina, Chief of Staff
Matt Brown, Director of Financial Services
Lisa Fjordbeck, Operations Coordinator for the Superintendent's Office
Brooke Wagner, Assistant Superintendent for Administrative Services
Jill Cuadros, Director of Nutrition Services
Juan Carlos Cuadros, Assistant Superintendent of Equity, Inclusion, and Belonging
Larry Williams, Assistant Superintendent of Instruction
Sebastian Bolden, Director of Middle School Education
Jeff Johnson, Director of Elementary Education
Kelly McIver, Communications Director
Christine Nesbit, General Counsel
Cynthia Calletano, Executive Assistant to the Chief of Staff
Debbie McKim, Executive Assistant to the Interim Superintendent and Board

STUDENT REPRESENTATIVES:

Sheridan Schilling, Churchill High School

EMPLOYEE GROUPS:

Lisa Jenkins-Easton, Oregon School Employees Association (OSEA)
Misty Jackson, MAPS
Nicholas Hadley, MAPS

OTHER GUESTS:

None.

MEDIA:

KVAL
KEZI
KRVM
Register Guard

I. CALL TO ORDER AND ROLL CALL

Chair Jonak called the special board meeting to order at 5:00 p.m. She said the names of the Board members who were present.

II. AGENDA APPROVAL

The agenda was approved as presented.

III. ITEM FOR ACTION

1. APPOINTMENT OF SUPERINTENDENT

Chair Jonak provided background information regarding the appointment of a permanent Eugene School District 4J superintendent. She explained that the Board of Directors (BOD) began the process of identifying a permanent superintendent in fall 2024. The selection process was designed to be highly inclusive and community informed. Students, families, staff, and community members provided input about desired leadership qualities. Candidates were interviewed by community panels, district leadership, and the BOD. Chair Jonak recommended the appointment of Miriam Mickelson to the position of 4J superintendent beginning on July 1, 2025.

Chair Jonak opened the floor for comments.

Vice Chair Di Liberto thanked all participants in the superintendent search process. He welcomed Dr. Miriam Mickelson to 4J.

Ms. Newman echoed Vice Chair Di Liberto's statements and commented on Dr. Mickelson's strengths and expertise.

Ms. Rabasa read a personal statement in favor of Dr. Mickelson's appointment, stating that she genuinely believes Dr. Mickelson is leader who will compassionately and with firm commitment guide 4J in refining systems to be centered on the cornerstones of building relationships, celebrating all of our humanity, inspiring excellence, and connecting through community.

Interim Superintendent Gill expanded on Dr. Mickelson’s merits. He mentioned the importance of the district having a long-serving superintendent. He said that 4J has been on the forefront of equitable practices, innovation, and incredible student success under the steady and trusted leadership of long serving superintendents.

Mr. Hamilton praised Dr. Mickelson’s commitment to Diversity, Equity, and Inclusion (DEI).

Chair Jonak said she is thrilled with the selection of Dr. Mickelson for permanent superintendent. She added that Dr. Mickelson’s leadership qualities, life experiences, kindness, empathy, and deep caring for students and staff is exactly what 4J needs.

MOTION: Vice Chair Di Liberto moved to appoint Miriam Mickelson to the position of superintendent of Eugene School District 4J to take office on July 1, 2025 pending the completion of contract negotiations. Ms. Rabasa seconded. **The motion passed unanimously, 7:0; Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Newman, Ms. Thessen, Ms. Munro, and Mr. Hamilton all voting in favor.**

2. DESIGNATE BOARD MEMBER TO COMPLETE SUPERINTENDENT CONTRACT

Chair Jonak initiated designating a Board member to complete the superintendent contract. She recommended that Ms. Newman be tasked with preparing a proposed contract for approval.

MOTION: Vice Chair Di Liberto moved to designate Ms. Newman to work with legal counsel to complete contract negotiations with Dr. Miriam Mickelson and present the contract to the BOD for approval at a future meeting. Mr. Hamilton seconded. **The motion passed unanimously, 7:0; Chair Jonak, Vice Chair Di Liberto, Ms. Rabasa, Ms. Newman, Ms. Thessen, Ms. Munro, and Mr. Hamilton all voting in favor.**

IV. ADJORN

Chair Jonak adjourned the special board meeting at 5:21 p.m.



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

April 16, 2025

Title

Ed Center Rooftop Mechanical Equipment Install

Presenter

Ryan Spain – Director of Facilities

Background

Work order frequency and lacking availability of replacement parts/materials are key indicators of when equipment replacement becomes necessary. Two rooftop mechanical units at the Ed Center fit this category and are in need of replacement before failures can no longer be repaired. The equipment purchase was approved by the Board on the February 5, 2025 consent agenda. This specific consent agenda item is for the installation of the pre-purchased HVAC equipment. Work is scheduled for early summer, when outside temperatures are similar to those typically desired inside, thus limiting impacts to the Ed Center operations while units are down for replacement.

Budget/Resource Implications:

Multiple installation bids were received. The successful installation bid by Harvey & Price in the amount \$263,424 and will be funded from available capital reserve funds.

Recommendation

The superintendent recommends the award to Harvey & Price for the Ed Center Mechanical Equipment install in the amount \$263,424, funded from available capital reserve funds.



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

April 16, 2025

Title

Bond Project – Multi Site Playground Improvements

Presenter

Ryan Spain – Director of Facilities

Background

Local voters approved a bond measure in November 2018 to fund capital improvements and maintenance at every 4J school. This project includes playground maintenance and improvements to multiple locations across the district. Improvements vary by location but include some improvements at the following sites. Howard, River Road, Chinese Immersion @ Kennedy, Twin Oaks, Fox Hollow, Yujin Gakuen, Adams, Chavez, Willagillespie, Buena Vista, Holt and Gilham. Work is scheduled to occur over the 2025 summer break. Charlemagne, McCornack, Edgewood, Spring Creek, and Awbrey Park not listed above are currently under review for their playground improvements over the 2026 summer due to complexity of improvements requiring design services.

Budget/Resource Implications:

This purchase includes all equipment, materials, shipping, assembly and installation for the Multi Site Playground Improvements will be funded from available General Obligation Bond funds. MRC GameTime is an OMNIA Partners f/n/a USC Contract #2017001134 Vendor #121531 and recommended award for \$890,515.

Recommendation

The superintendent recommends the award to MRC GameTime for the Multi Site Playground Improvements in the amount \$890,515, funded from General Obligation Bond funds.



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

April 16, 2025

Title

Bond Project – Coburg Elementary School Roofing

Presenter

Ryan Spain – Director of Facilities

Background

As building roofs reach the end of their useful life, Facilities schedules replacement roofs to protect and extend the useful life of the district’s assets. These projects paid for through available General Obligation Bond funds. Coburg Elementary School’s roofs is in need of replacement. While Coburg Elementary is currently leased by Coburg Charter, the District is still responsible for roof replacement under the current lease agreement. Roofing work has been scheduled for the summer of 2025.

Budget/Resource Implications:

Multiple bids were received. The successful bid by Roof Toppers was \$1,407,837 and will be funded from available General Obligation Bond funds.

Recommendation

The superintendent recommends the award to Roof Toppers for the Coburg Elementary School’s roofing project in the amount \$1,407,837 funded from available General Obligation Bond funds.



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

April 16, 2025

Title

Bond Project – Multi Site Paving Improvements

Presenter

Ryan Spain – Director of Facilities

Background

As part of ongoing facility improvements, the District is planning for parking lot paving improvements at three school sites. These upgrades, funded through available General Obligation Bond funds, will enhance safety, accessibility, and longevity. Paving work has been scheduled for the summer of 2025 at Churchill High School, Monroe Middle School and Gilham Elementary School.

Budget/Resource Implications:

Multiple bids were received. The successful bid by Delta Construction was \$805,071 and will be funded from available General Obligation Bond funds.

Recommendation

The superintendent recommends the award to Delta Construction for the multi-site paving improvements project in the amount \$805,071 funded from available General Obligation Bond funds.



ITEM FOR ACTION – CONSENT AGENDA

Date of Meeting

April 16, 2025

Title

Approve the Replacement of 4J's Core Network Infrastructure Including the WIFI Infrastructure

Presenter

Steve Menachemson, Director of Technology

Background

Mission critical backbone equipment interconnecting all digital platforms in the district requires replacing. Exceeding 7 years old the current platform has limitations restricting design changes, capacity, performance and stability. Due to end of life, this equipment has limited vendor technical support and maintenance available.

In addition to replacing these components, implementation is supported with a new design providing:

- Enhancement to survivability
- Increase bandwidth capacity
- Growth and stability
- Performance and security

This request seeks Board approval for a phased approach to replace/upgrade the following

- Juniper equipment
- Aruba equipment

The project will be rolled out in phases and completed over 5 years. 4J intends to leverage eRate discount to support these purchases. Funding for this purchase is secured from the 4J Bond. The 5 year subscription has the approval of bond council due to the significant savings in excess of ~\$1.5M. This is a request is for the first phase of the project with additional hardware purchases made each year leveraging eRate discount of ~80%.

If the Board declines to approve this purchase, it is possible that the cost of a future purchase would be greater and require district funds outside of bond. The risk of network outage and therefore operational impact across the district will increase.

Recommendation

The Superintendent recommends approval of the purchase of the equipment listed above at a cost of ~\$1.7 M for phase 1.



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

Wednesday, April 16, 2025.

Title

Approval of the 2025 Eugene School District 4J Supplemental Plan

Presenter/s or who is submitting this item

Arthur Hart, Director of Transportation

Background

Eugene School District 4J Supplemental Busing Plan Update FAQ

Q: What is Supplemental Busing?

A: Both board policy and state law require the district to provide transportation for students who live outside the “walk zone,” which extends a mile from elementary schools and 1.5 miles for secondary Schools. (4J has permission for high school students to ride transit. We only provide school buses for high school students living more than 1.5 miles from an LTD stop, or when LTD does not provide service to an area with appropriate frequency to serve a school.) A district is also required to provide transportation, called supplemental busing, for any student within the “walk zone” where specific safety or health concerns justify providing transportation.

Q: What is the Supplemental Busing Plan?

A: The state reimburses 70% of approved costs for 4J student transportation. The funding rules require that districts provide a Supplemental Plan to be approved by the State Board of Education in order to receive this reimbursement for students who live closer than the prescribed distances to the school. The Supplemental Plan includes information on the traffic safety concerns, or hazards, that lead to supplemental busing; the number of students impacted; the board resolution specifying the plan as submitted; and any other supporting documents. (See OAR 581-023-0040 (g) Approved Transportation Costs for Payments from the State School Fund for details.)

Q: Why does it need updating?

- A: We migrated to a new routing system in the summer of 2024.
 - Higher definition maps available in the new system created an opportunity to better communicate hazard areas in an updated supplemental plan.
 - When we migrated to the new routing software we discovered that the older routing software had incorrectly calculated walk zones. Walk zones were corrected and this necessitated a review of hazardous areas.
 - Spencer Butte has four new hazards that need to be reported.
 - Edgewood has one new hazard that needs to be reported.
 - ATA has one new hazard that needs to be reported.

- Awbrey Park has an adjusted hazard that needs to be reported.
 - Madison has one new hazard that needs to be reported.
 - Spring Creek has one new hazard that needs to be reported.
- The 2024 McCornack hazard should have been divided into two hazards to properly identify the area served by a crossing guard. This has been corrected.

Q: What is the process for updating the plan?

A: Transportation and Safety staff have scored infrastructure within the walk zone to objectively determine whether it crosses the threshold deemed hazardous. Administration will have the opportunity to review the plan before it goes to the 4J Board for a work session and approval. Once approved by the Board, it will be submitted to the State Board of Education for approval.

Q: Who will be impacted by updating the plan?

A: The updated plan will more accurately calculate safe walking paths. This reevaluation of the hazard zones may find that some students have new eligibility for busing, in accordance with district policy and state law.

Q: What role should equity have in the Supplemental Plan?

A: Supplemental Plans are, in their essence, a tool for equity. 4J's current Supplemental Plan addresses only the equity related to traffic safety for students in Walk Zones. However, Supplemental Plans do not have to be limited to just traffic safety and there are many other factors of equity that can and should be considered when establishing a Supplemental Plan.

In this supplemental plan update-

- We have added the Attendance Informed Equity Transportation Program. When we corrected the walk zones for the fall of 2024 we discovered that some low-income housing complexes were not eligible for transportation. Concerns regarding attendance were noted and were addressed in various ways utilizing existing stops, but this was not an ideal solution. The proposed Attendance Informed Equity Transportation Program seeks to provide these areas of equity concern with transportation eligibility based on socioeconomic and attendance concerns
- We have added the Safety Informed Temporary Transport Program. Temporary safety concerns are periodically discovered that are not covered in the regular supplemental plan hazard methodology, but would affect a student's safe walking path to school. The proposed Safety Informed Temporary Transport Program seeks to address these problems in a way that ensures eligibility for reimbursement.



Eugene School District 4J
Supplemental Plan
March 2025

Supplemental Plan prepared by:

Arthur Hart, Transportation Director

Jason Wolf, Business Info Systems Analyst

Sarah Mazze, Safe Routes to School Coordinator

Brad Albee, Safe Routes to School Coordinator

EVALUATION OF WALKING AREAS & PROPOSED SUPPLEMENTAL PLAN

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Introduction

In accordance with state law, the district is required to provide transportation for elementary students who reside more than one mile from school and for secondary school students who reside more than 1.5 miles from school, also known as the “walk zone.” A district is also required to provide transportation for any student within the walk zone where specific health and safety concerns justify providing transportation.¹

Eugene School District 4J has an Oregon Department of Education approved waiver affecting the transport of high school students who live outside the prescribed walking distance. The waiver requires that Eugene School District 4J provides qualified high school students transport when they reside more than 1.5 miles from an LTD bus stop, and in circumstances where safety may be an issue. Such safety issues would be noted in the supplemental plan.

The state reimburses 70% of the approved cost for 4J transportation. The funding rules require that districts provide a Supplemental Plan to be approved by the State Board of Education in order to receive this reimbursement for students who live closer than the prescribed distances to the school. (See Appendix A for text of OAR 581-023-0040) With the passage of HB 3014 in 2023, Oregon school districts may now be reimbursed for the use of “alternate transportation” for getting students to school if included in a Supplemental Plan and with documentation that the reimbursement requested is equal to or less than the previously allowable costs (Sections 1 of ORS 327.003 and Section 2 of ORS 327.043).

Eugene School District 4J (4J)’s most recent Supplemental Plan was approved by the state in 1992. Since the inception of the 1992 Supplemental Plan, school boundaries have changed and busing due to hazards have increased in some locations and decreased in others. In addition, in some locations, 4J is choosing to use crossing guards rather than busing students in the walk zone because of the challenges of bus driver shortages and for the benefits accrued through cost savings

¹ OAR 327.006 Definitions for State School Fund distributions. As used in ORS 327.006 to 327.133, 327.348 and 327.731: (C) Any student required to be transported for health or safety reasons, according to supplemental plans from districts that have been approved by the state board identifying students who are required to be transported for health or safety reasons, including special education; <https://content.govdelivery.com/accounts/ORED/bulletins/2ef295e#:~:text=ORS%20327.043%20When%20istrict%20required,than%201.5%20miles%20from%20school>.

House Bill 3014: Directs State Board of Education to adopt rules that allow for reimbursement of school district expenses incurred in lieu of transporting students. Prohibits reimbursements that are greater than amount school district would have received if school district had provided transportation. Declares emergency, effective July 1, 2023.

[House Bill 3014](#)

and the emotional benefit that interacting with the caring adults that are the crossing guards will provide for students served by the supplemental plan and other students using those crosswalks. The cost differential for using crossing guards in specific locations is included in the pages that follow in the description of the hazards at those schools.

Based on the hazards described in this document, approximately 727 students will be eligible for district-provided transportation within the walk boundaries due to hazards. The plan does not include sites that house schools that currently do not have transportation boundaries, such as charter and choice schools.

With the goal of addressing equity issues around transportation and attendance, this plan also provides for a pilot providing temporary (up to three months of) Supplemental Busing on a case by case basis, with Director approval. Such busing would provide a means for students to get to school while the district provides support for resolution of circumstances that challenge students' ability to get to and from school by other means. Equity triggers include race, poverty, language barriers/new arrivals, student or family medical problems and general education director placement. At the end of the pilot, the district will review how many students participated and how the process went.

Methodology

A point system, based upon a format used by other districts throughout the state, was developed to allow objective decision making on roadways throughout our district. This system assigns points to the following hazard criteria as outlined below:

1. SAFETY WALKING ALONG ROAD:

This is the area usable for students to walk on for the road in question. The assumption is that scoring for one side of the street only means that there is no facility or usable space on the other side of the street. If the scoring is for a shoulder, that means there is no sidewalk.

- Raised Sidewalk both sides of street - 0 Points
- Raised sidewalk on one side of street - 1 Point
- Street level sidewalk separated from street with planter strip or parking on both sides of street - 2 Points
- Street level sidewalk separated from street with planter strip or parking on one side of street - 3 Points
- In-street, separated facility on both sides of street - 4 Points
- In-street, separated facility on one side of street - 5 Points
- Shoulder greater than three feet on both sides of street- 6 Points
- Shoulder greater than three feet on one side - 7 Points
- Shoulder 1-3 feet wide on both sides of street - 8 Points
- Shoulder 1-3 feet wide on one side of street - 9 Points
- Shoulder restricted by vegetation, ditches and/or culverts, with no available walk space distance walked shorter than 200 feet - 10 Points
- Shoulder restricted by vegetation, ditches and/or culverts, with no available walk space distance walked greater than 200 feet - 15 Points

2. CROSSING SAFETY

It is important that street crossings are *appropriate and effective* given the street classification. Enhanced crossings include striping, traffic signals, rectangular rapid flashing beacons (RRFB), pedestrian islands, etc. and are contingent on the street classification, volume of traffic and road speed. For example, a major arterial could have a traffic light and striping or it could have a RRFB, island and striping. It would be appropriate for a collector to have striping alone, or striping and a pedestrian island.

- Enhanced crossings every intersection - 0 Points

- Enhanced crossings every eighth of a mile - 1 Points
- Enhanced crossings every quarter of a mile - 4 Points
- Enhanced crossings further than every quarter mile - 5 Points
- *** Arterials receive twice as many points as other road classifications - Double the Points**
- *** Remove 3 points for elementary and 5 for middle if there is a traffic signal controlled crossing on the street in question. Exceptions will be where the number of vehicular turning movements through the school crosswalk exceeds 300 per hour while pedestrians are going to or from school, or when there are 4 or more lanes of traffic.**

3. LCOG CRASH DATA:

The [LCOG Crash Map](#) is reviewed for bicycle or pedestrian crash history within the street segment under review. A single crash could be an indication of a random act, whereas multiple crashes indicates a more systemic problem in that location.

- One crash receives - 1 Point
- Two crashes receives - 3 Points
- Three crashes receives - 7 Points
- Four or more crashes receives - 10 Points

4. SPEED LIMIT:

Using Google Maps or a site visit, posted speed is documented for the segment under review. School zones are not accounted for here, as they are variably adhered to, particularly depending on the type of signage, whether or not they have lights and the speed differential between the school zone and the posted speed limit for the remainder of the street.

- 20 mph - 0 Points
- 25 mph - 1 Point
- 30 mph - 3 Points
- 35 mph - 5 Points
- 40 and greater mph - 7 Points

5. TYPE OF STREET:

Street classifications are found [in this map](#) (also in Appendix B of this report), produced by the City of Eugene. Points vary from 0 to 7. See Appendix B for the road classification map.

Street Classification:

- Major Arterial - 7 Points
- Minor Arterial - 5 Points
- Major Collector- 3 Points
- Neighborhood Collector - 2 Points
- Local - 0 Points

6. ROAD WIDTH, LANES AND PARKING:

Road width is measured as the paved roadway, including bike lanes, shoulders and parking. The number of lanes include travel and continuous dedicated turn lanes in all directions. Bike lanes, cycle tracks and other active transportation facilities are not included in the number of lanes. Points will be awarded as follows:

- Roads without lane markers - 0 Points
- Two lane - 1 Point
- Three lanes - 2 Points
- Four lanes - 3 Points
- Five or more lanes - 4 Points
- *** Add two additional points for width greater than 45 feet.**
- *** On street parking earns one point total for parking on one or both sides of the road, as this impedes visibility.**

7. LIGHTING:

Lack of lighting, or darkness, is a key factor in many severe crashes.

- Streets that lack lighting at intersections or on curves - 3 Points

8. DELAYED EMERGENCY RESPONSE:

Emergency services are likely to arrive at the scene of a crash later in hard to reach areas, potentially impacting outcomes for students involved in a crash. If the score is close, this could be confirmed with police dispatch.

- Harder to reach area with slow response time (according to police dispatch, there are slower response times in SE hills - up Willamette or Donald - Ex: Nectar Way) - 3 Points

9. OTHER CONDITIONS:

The points vary from 1 to 10 with 10 indicating a high risk. This includes specific identifiable items not covered elsewhere on the evaluation, with each item earning one point. For example:

- Lack of school zone or school crossing signs
- Terrain features that impact visibility, like hills and curves
- Unmarked crosswalks across arterials in the walk area
- Secluded or isolated areas
- Heavy commercial traffic in the area
- Non-perpendicular intersections
- Steep grades
- Crossing a waterway
- Crossing train tracks
- Other

Hazard Formula

The hazard threshold is established by adding the median from the hazard criteria, (above) numbers 1 thru 7, to get a score of 27 points, which is used for elementary students to establish a hazard area. For middle and high school students, the hazard threshold is 32 points. (An additional 5 points is allowed for middle and high school students.)

Points from evaluation criteria 8 and 9 are not part of establishing the base for the hazard threshold, as they are more rare, one-off conditions.

See Appendix D for a copy of the worksheet used for the walk zone evaluations or click this [link](#) to the Supplemental Busing Evaluation Spreadsheet.

Future Support for Approved Supplemental Plan

The Transportation department recognizes that changes as large as those in this proposal require a significant amount of support following implementation. To support this Supplemental Plan, the Transportation department, in partnership with the 4J Safe Routes to School program, will provide the following for areas losing Supplemental Busing:

1. A letter to send home encouraging families in the Walk Zone to try active transportation like walking or biking and that includes general recommendations on route selection for active transportation and that shares specific local information like locations of marked crossings.
2. Continued communication with the City of Eugene and Lane County to share our priorities for improvements to the Walk Zones surrounding schools. 4J Safe Routes to School has developed a prioritized list of infrastructure needs focused on both the areas where students currently walk and areas that are deemed hazardous. ([Link](#) to Safe Routes to School Infrastructure Prioritization tool.)
3. Work with schools to ensure proper training and attire for Crossing Guards and to ensure conformity with the standards outlined in the Oregon Department of Education's Traffic Patrol Manual for Schools, [linked here](#).
4. Work with schools to support the Safe Routes to School Program efforts. The goals of the Safe Routes to School program are to promote and facilitate the use of active and shared transportation for the school commute; encourage a healthy and active lifestyle at an early age; facilitate the planning, development, and implementation of projects and activities that will improve safety and reduce traffic, fuel consumption and air pollution surrounding schools. This includes support of Walk & Roll to School Days in October and May; Pedestrian and Bicycle Safety Education classes; Learn to Ride a Bike programming; and other related efforts that fall within the 6 "E's" (Engineering, Equity, Engagement, Encouragement, Education and Evaluation.)

List of All 4J Schools with Location and Enrollment

Elementary Schools

Adams Elementary School

Adams Elementary School is located at 950 W. 22nd Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 390 students.

Awbrey Park Elementary School

Awbrey Park Elementary School is located at 158 Spring Creek Drive in Eugene, Oregon serving students grades K-5. The student population is approximately 419 students.

Buena Vista Spanish Immersion Elementary School

Buena Vista Spanish Immersion Elementary School is located at 1500 Queens Way in Eugene, Oregon serving students grades K-5. The student population is approximately 421 students.

Camas Ridge Elementary School

Camas Ridge Elementary School is located at 1150 E. 29th Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 255 students.

Cesar E. Chavez Elementary School

Cesar E. Chavez Elementary School is located at 1510 W. 14th Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 368 students.

Charlemagne French Immersion Elementary School

Charlemagne French Immersion Elementary School is located at 3875 Kincaid Street in Eugene, Oregon serving students grades K-5. The student population is approximately 302 students.

Chinese Language Immersion Program

Chinese Language Immersion Program is located at 2200 Bailey Hill Road in Eugene, Oregon serving students grades K-5. This is a new program and student enrollment is 110.

Edgewood Community Elementary School

Edgewood Community Elementary School is located at 577 E. 46th Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 429 students.

Edison Elementary School

Edison Elementary School is located at 1328 E. 22nd Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 332 students.

Family School (Elementary)

Family School Elementary is located at 1155 Crest Drive in Eugene, Oregon serving students grades K-5. The student population is approximately 112 students.

Gilham Elementary School

Gilham Elementary School is located at 3307 Honeywood Street in Eugene, Oregon serving students grades K-5. The student population is approximately 591 students.

Holt Elementary School

Bertha Holt Elementary School is located at 770 Calvin Street in Eugene, Oregon serving students grades K-5. The student population is approximately 488 students.

Howard Elementary Technology Immersion School

Howard Elementary Technology Immersion School is located at 700 Howard Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 502 students.

McCornack Elementary School

McCornack Elementary School is located at 1968 Brittany Street in Eugene, Oregon serving students grades K-5. The student population is approximately 313 students.

River Road/El Camino del Rio Elementary School

River Road/El Camino del Rio Elementary School is located at 120 W. Hilliard Lane in Eugene, Oregon serving students grades K-5. The student population is approximately 436 students.

Spring Creek Elementary School

Spring Creek Elementary School is located at 560 Irvington Drive in Eugene, Oregon serving students grades K-5. The student population is approximately 254 students.

Twin Oaks Elementary School

Twin Oaks Elementary School is located at 85916 Bailey Hill Road in Eugene, Oregon serving students grades K-5. The student population is approximately 216 students.

Willagillespie Elementary School

Willagillespie Elementary School is located at 1125 Willagillespie Road in Eugene, Oregon serving students grades K-5. The student population is approximately 418 students.

Yujin Gakuen Japanese Immersion Elementary School

Yujin Gakuen Japanese Immersion Elementary School is located at 850 Howard Avenue in Eugene, Oregon (as of 2023-24) serving students grades K-5. The student population is approximately 214 students.

Fox Hollow Instructional Center

Fox Hollow Instructional Center is located at 5055 Mahalo Drive in Eugene, Oregon serving students grades K-12. The student population is approximately 0 students.

Middle Schools

Arts & Technology Academy

Arts & Technology Academy is located at 1650 W. 22nd Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 372 students.

Cal Young Middle School

Cal Young Middle School is located at 2555 Gilham Road in Eugene, Oregon serving students grades 6-8. The student population is approximately 493 students.

Kelly Middle School

Kelly Middle School is located at 850 Howard Road Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 430 students.

Kennedy Middle School

Kennedy Middle School is located at 2200 Bailey Hill Road in Eugene, Oregon serving students grades 6-8. The student population is approximately 355 students.

Madison Middle School

Madison Middle School is located at 875 Wilkes Drive in Eugene, Oregon serving students grades 6-8. The student population is approximately 413 students.

Monroe Middle School

Monroe Middle School is located at 2800 Bailey Lane in Eugene, Oregon serving students grades 6-8. The student population is approximately 522 students.

Roosevelt Middle School

Roosevelt Middle School is located at 500 E. 24th Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 550 students.

Spencer Butte Middle School

Spencer Butte Middle School is located at 500 E. 43rd Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 337 students.

High Schools

Churchill High School

Churchill High School is located at 1850 Bailey Hill Road in Eugene, Oregon serving students grades 9-12. The student population is approximately 1043 students.

Eugene Education Options Program

Eugene Education Options is located at 200 N Monroe Street in Eugene, Oregon serving students grades 9-12. The student population is approximately 65 students.

North Eugene High School

North Eugene High School is located at 200 Silver Lane in Eugene, Oregon serving students grades 9-12. The student population is approximately 1094 students.

Sheldon High School

Sheldon High School is located at 2455 Willakenzie Road in Eugene, Oregon serving students grades 9-12. The student population is approximately 1441 students.

South Eugene High School

South Eugene High School is located at 400 E. 19th Avenue in Eugene, Oregon serving students grades 9-12. The student population is approximately 1503 students.

Descriptions and Maps of Hazards

Adams Elementary

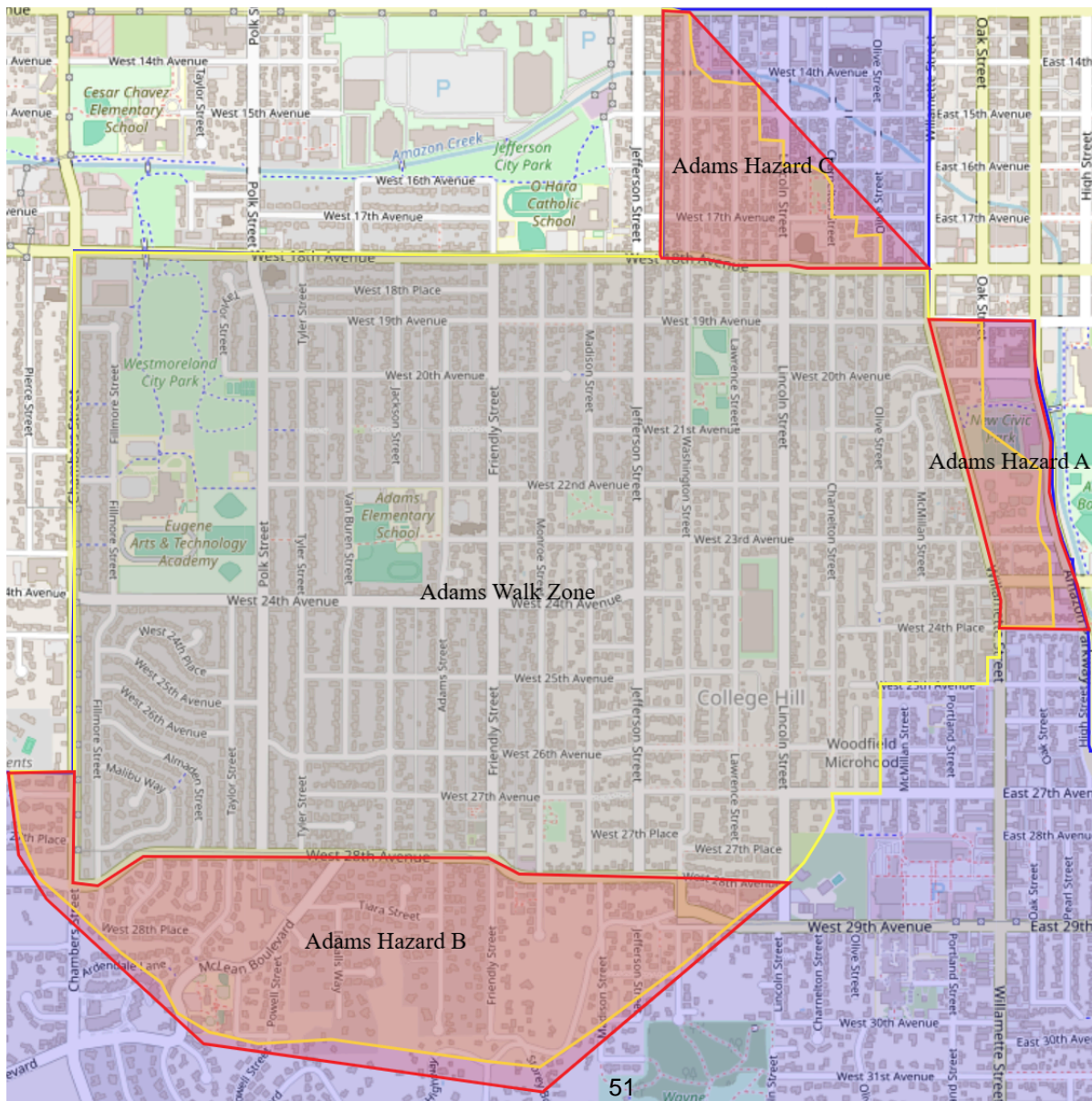
Total Enrollment: 390

Approx. Number of Students Affected: 60

Hazard A: Willamette Street between 19th-25th Avenues - arterial, crash history, difficult crossing.

Hazard B: W 28th/29th Avenue between Chambers Street and Lincoln Street (with the exception of Friendly Street to Jefferson Street) - arterial, crash history, crossing safety.

Hazard C: 18th Avenue between Willamette Street and Jefferson Street - arterial, crash history, crossing safety.



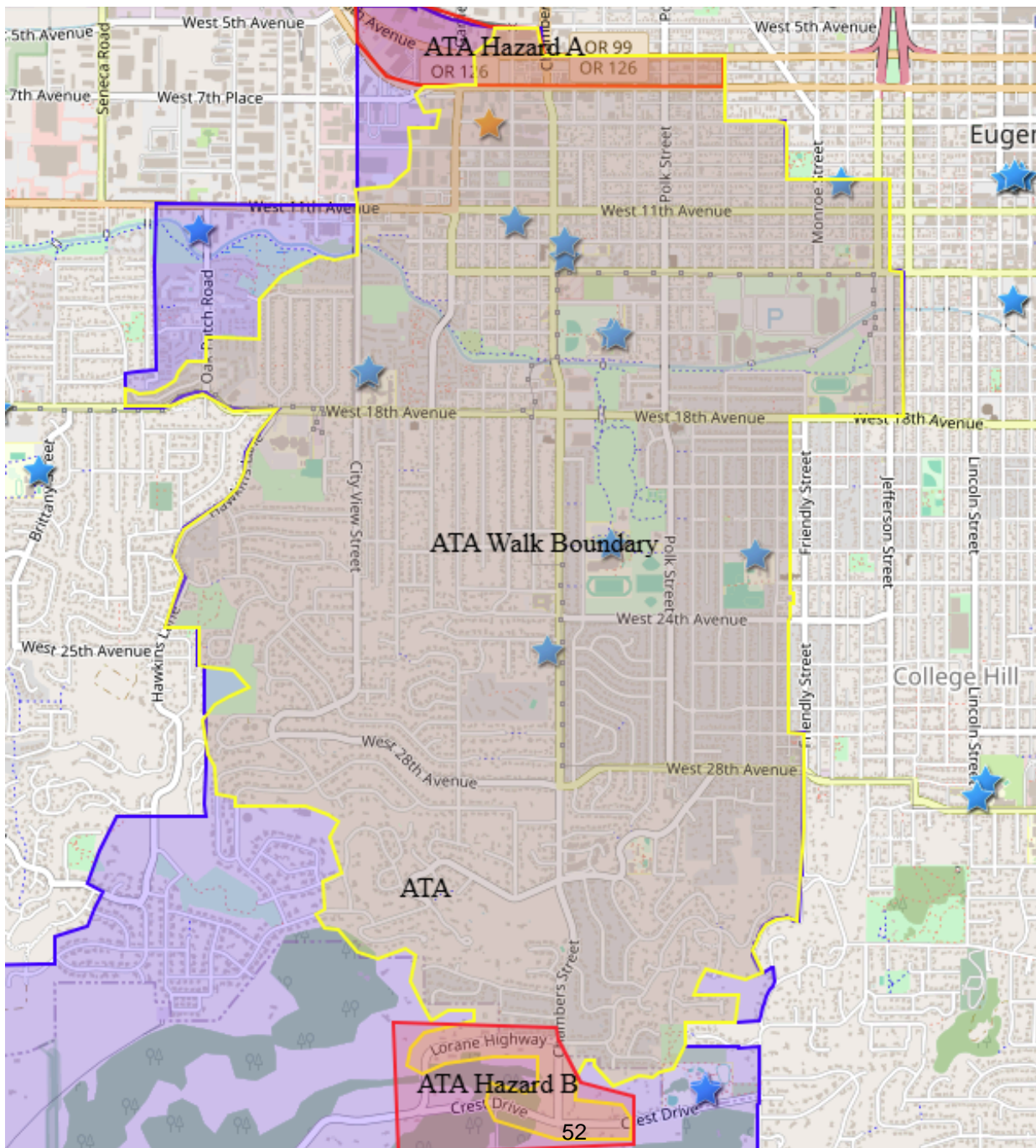
Arts and Technology Academy

Total Enrollment: 372

Approx. Number of Students Affected: 1

Hazard A: 6th Avenue between Tyler & Taylor - arterial, crash history, difficult crossing.
7th Avenue between Chambers Street & Van Buren - arterial, crash history, difficult crossing.

Hazard B: Chambers south of Lorane, Lorane west of Chambers, Crest adjacent to Lorane - no walking space, high speeds, no enhanced crossings or lighting



Awbrey Park Elementary

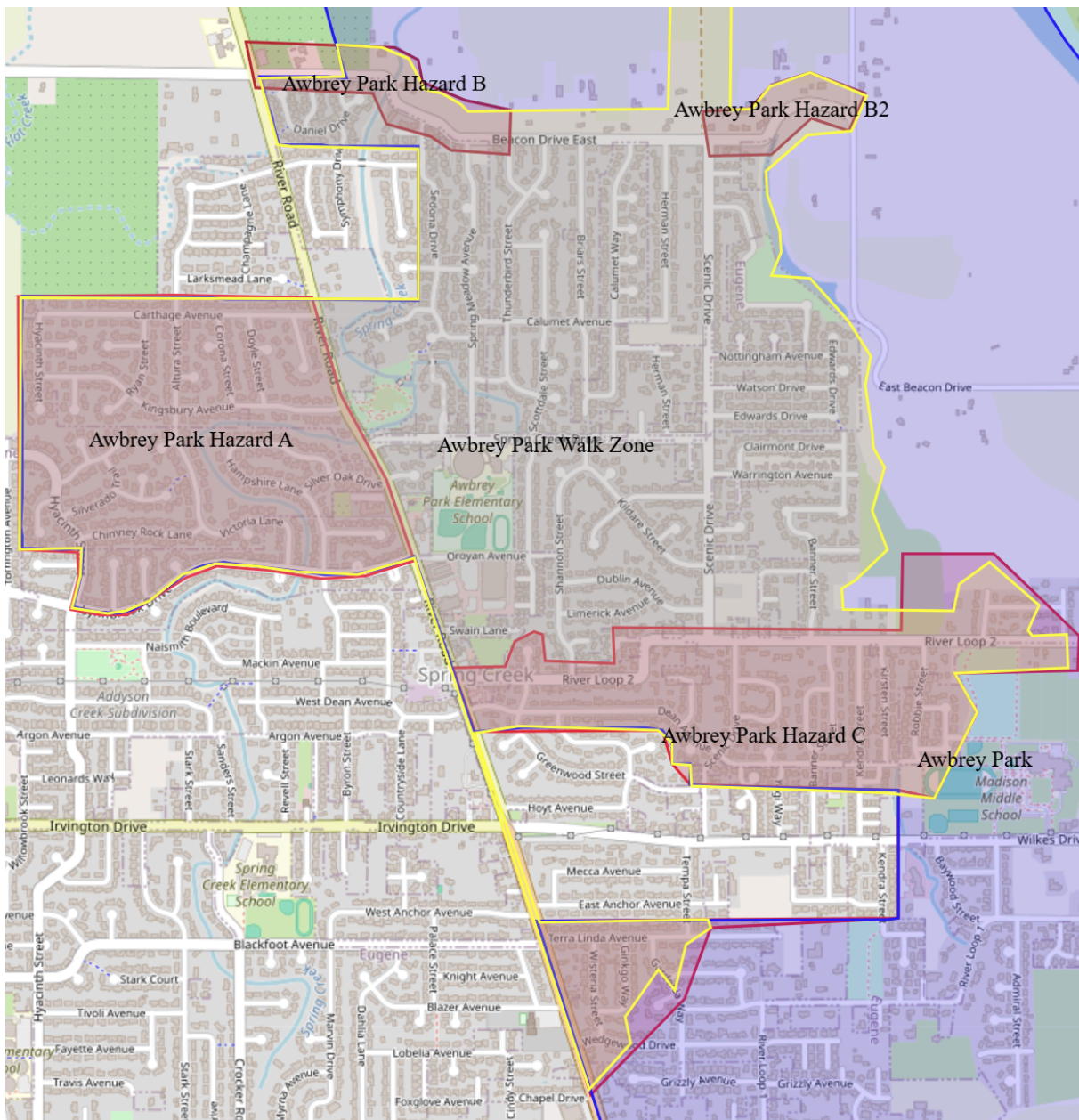
Total Enrollment: 419

Approx. Number of Students Affected: 91

Hazard A: River Road between Beacon Drive and Blackfoot Avenue - major arterial, crash history, difficult crossing

Hazard B: Beacon Drive between River Road & Futura and between Scenic to River Loop 1 - high posted speed, poor sight lines with no available walking or biking space

Hazard C: River Lp #2 - high posted speed, limited walking or biking space



Cesar Chavez Elementary

Total Enrollment: 368

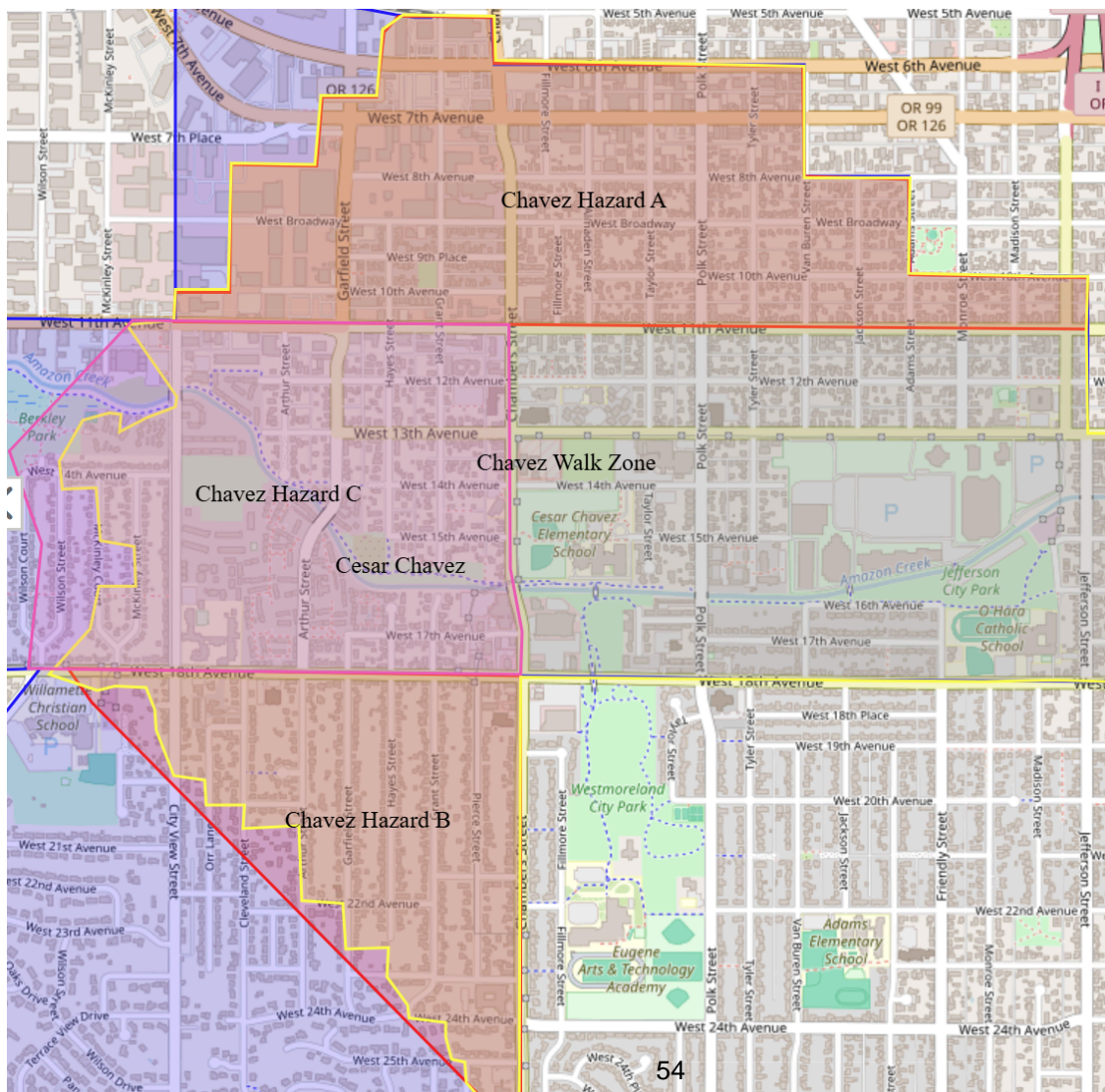
Approx. Number of Students Affected: 156

Hazard A: 11th Avenue - arterial, difficult crossing, crash history; 7th Avenue - arterial, difficult crossing, crash history; 6th Avenue - arterial, difficult crossing, crash history

Hazard B: 18th Avenue between Chambers Street and Hawkins - arterial, difficult crossing, crash history; Chambers between 18th and 25th - arterial, difficult crossing, multiple lanes, crash history

Hazard C*: Chambers Street between 11th and 18th Avenues - arterial, difficult crossing, multiple lanes, crash history.

*Use a crossing guard for this location rather than a bus. The projected annual cost for busing for this hazard is \$8,392. The cost for 1 hour of crossing guard time/day is projected to be \$4,944.



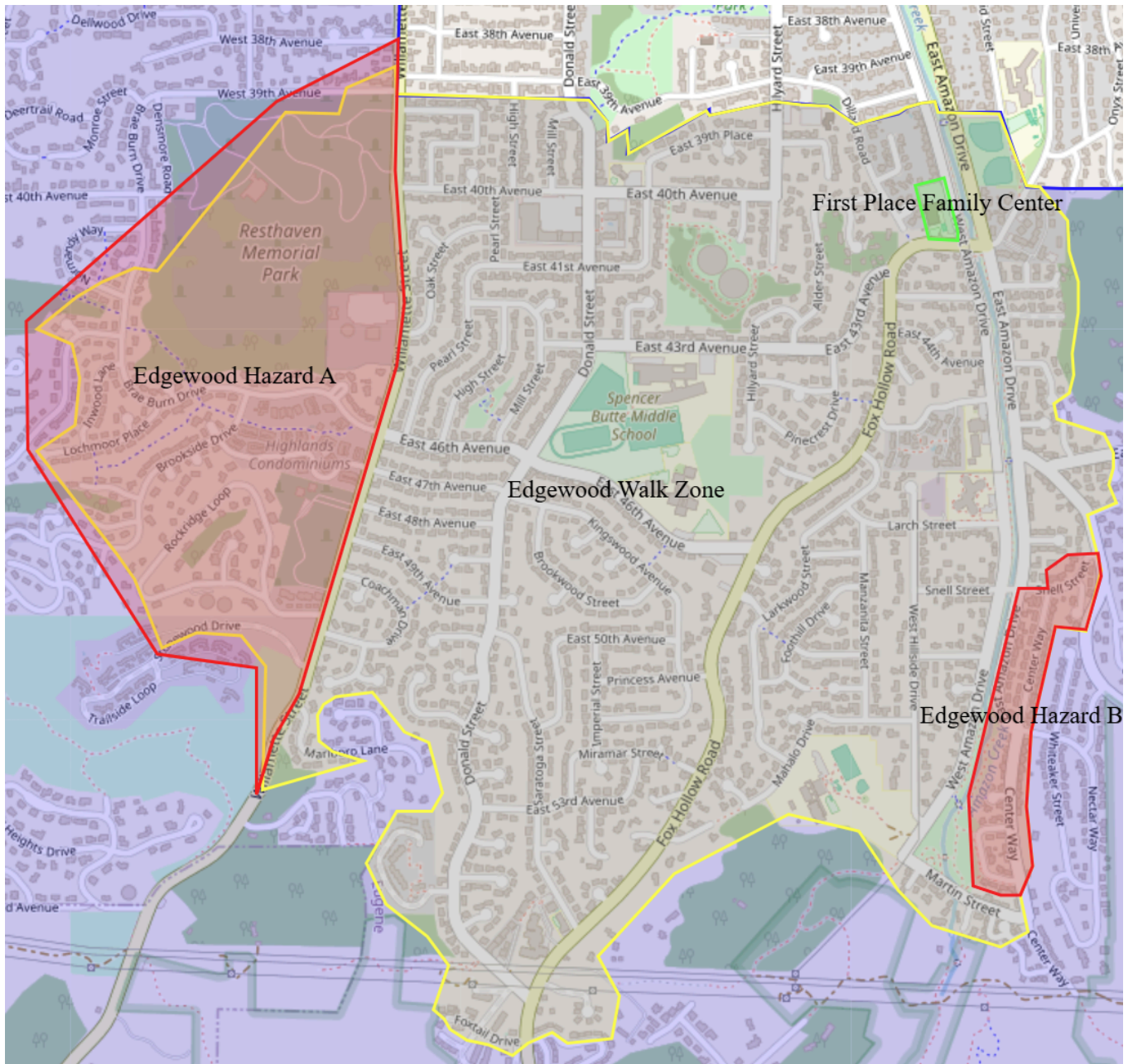
Edgewood Elementary

Total Enrollment: 429

Approx. Number of Students Affected: 32

Hazard A: Willamette Street between 37th Avenue & Spencers Crest - difficult crossing, high posted speed limit, crash history

Hazard B: Snell Street between East and West Amazon- narrow roadway, narrow verge, and an open/not-railed water crossing.



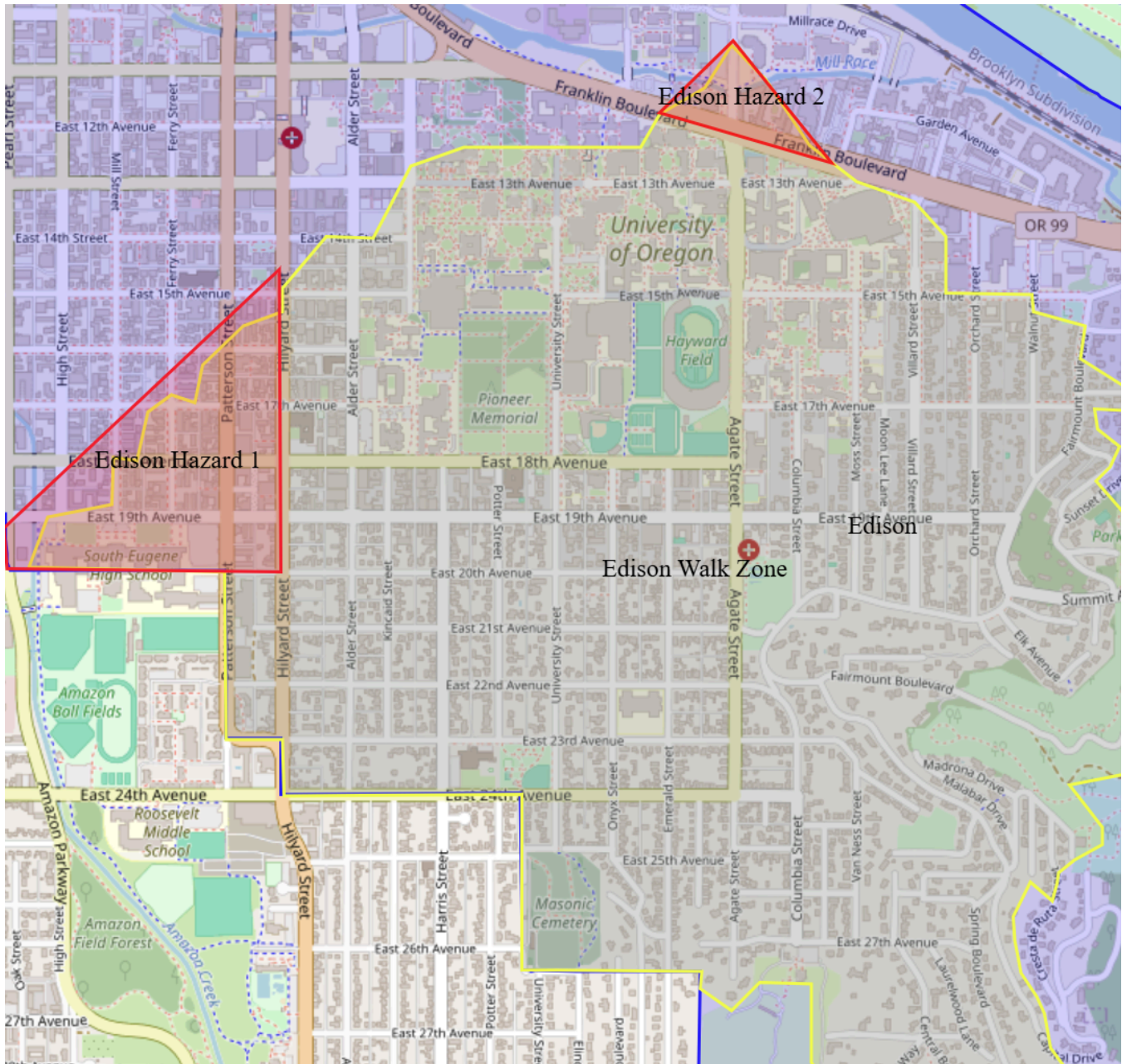
Edison Elementary

Total Enrollment: 332

Approx. Number of Students Affected: 13

Hazard A: Hilyard Street between 15th & 20th Avenue - arterial, difficult crossing, crash history

Hazard B: Franklin Boulevard between 11th Avenue and Agate Street - arterial, difficult crossing, crash history

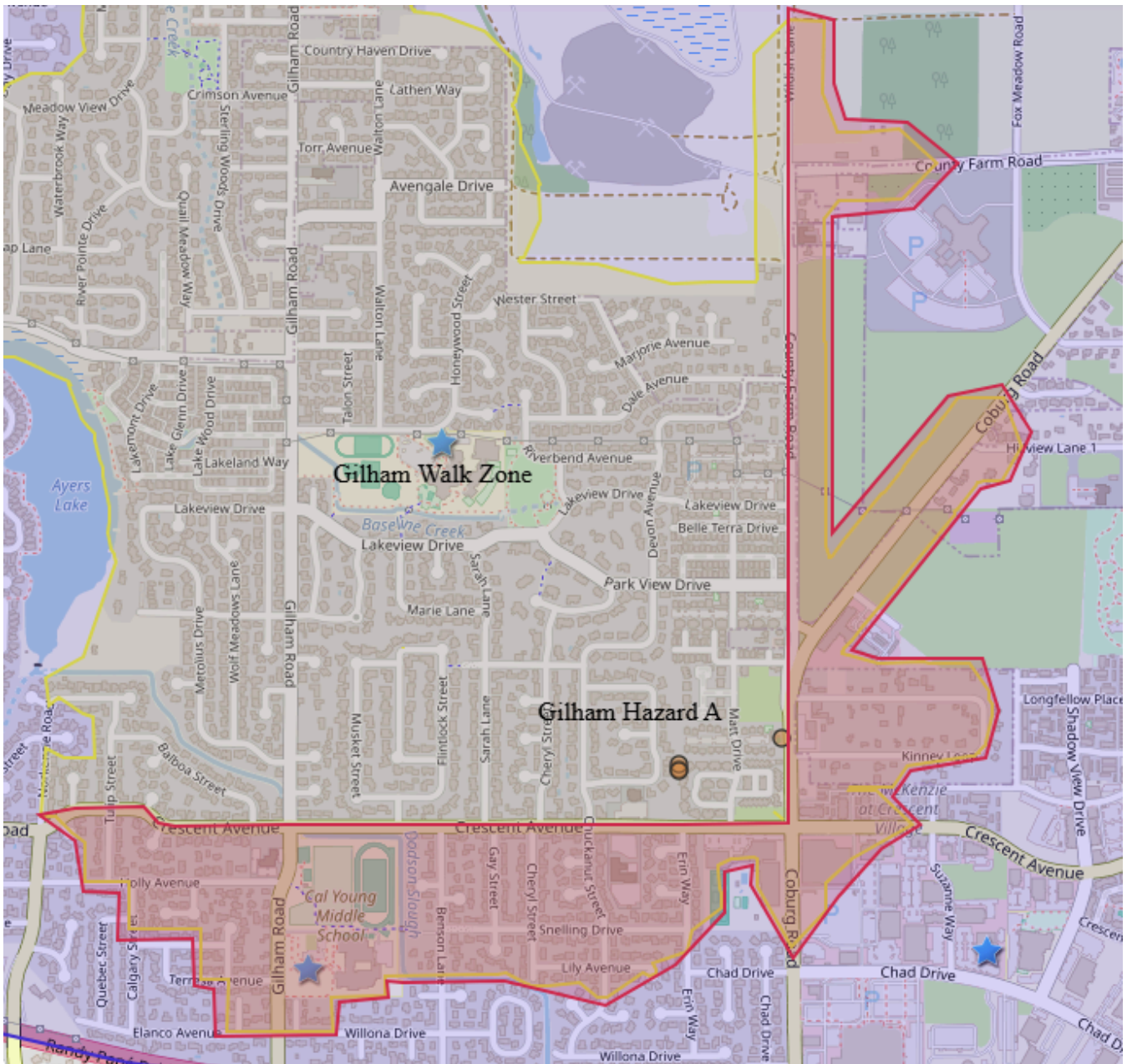


Gilham Elementary

Total Enrollment: 591

Approx. Number of Students Affected: 42

Hazard A: Crescent Avenue between Norckenzie Road & Coburg Road - arterial, crash history, difficult crossing; Coburg Road - major arterial, difficult crossing, multiple lanes



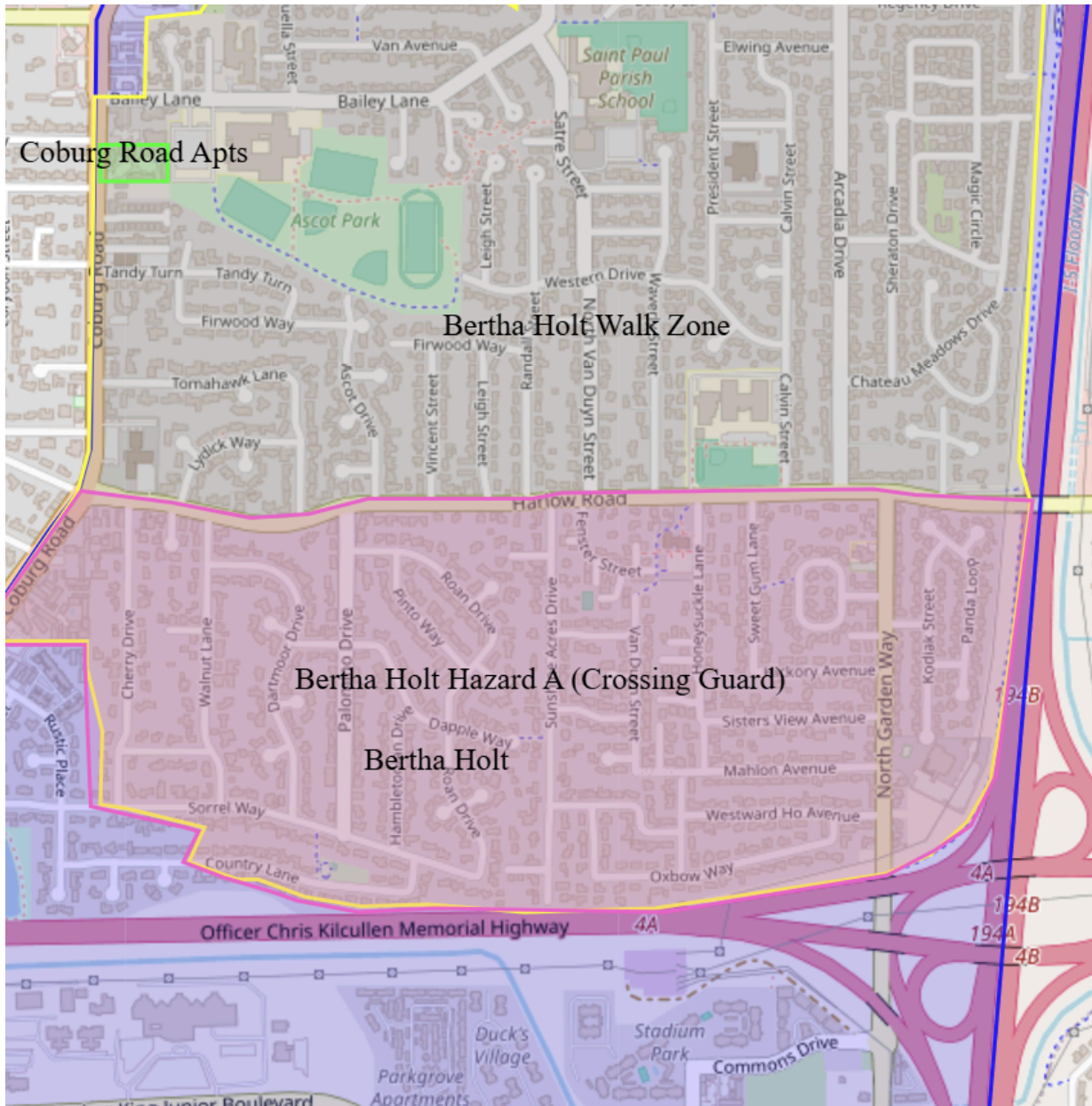
Holt Elementary

Total Enrollment: 488

Approx. Number of Students Affected: 87

Hazard A*: Harlow Road - arterial, high posted speed, crash history

*Use a crossing guard at Harlow and the light between Honeysuckle Lane and Sweet Gum Lane for this location rather than a bus. The projected annual cost for busing for this hazard is \$8,392. The cost for 1 hour of crossing guard time/day is projected to be \$4,944.

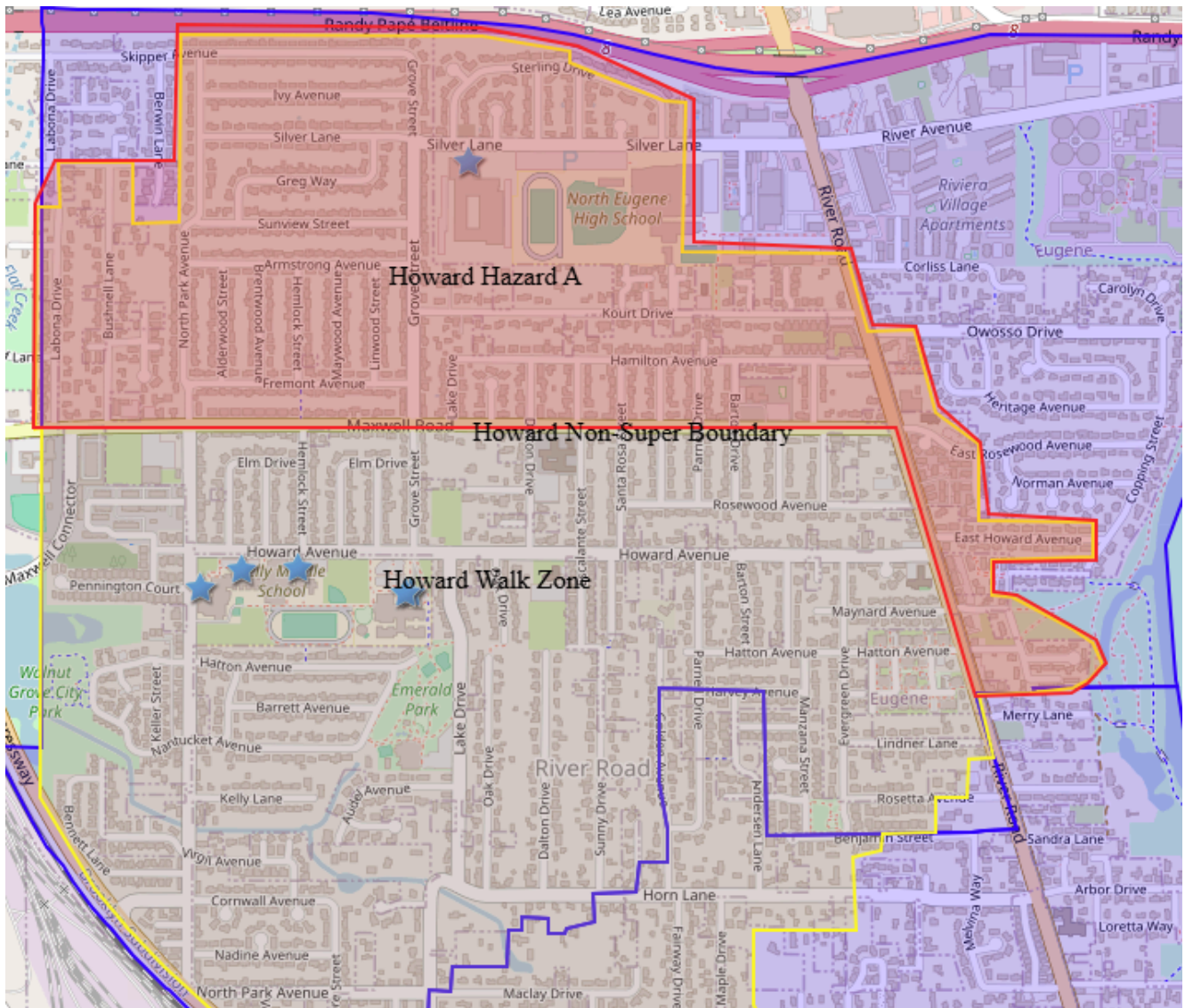


Howard Elementary

Total Enrollment: 502

Approx. Number of Students Affected: 127

Hazard A: River Road - major arterial, high posted speed, crash history, difficult crossing;
Maxwell Road - arterial, high posted speed, crash history

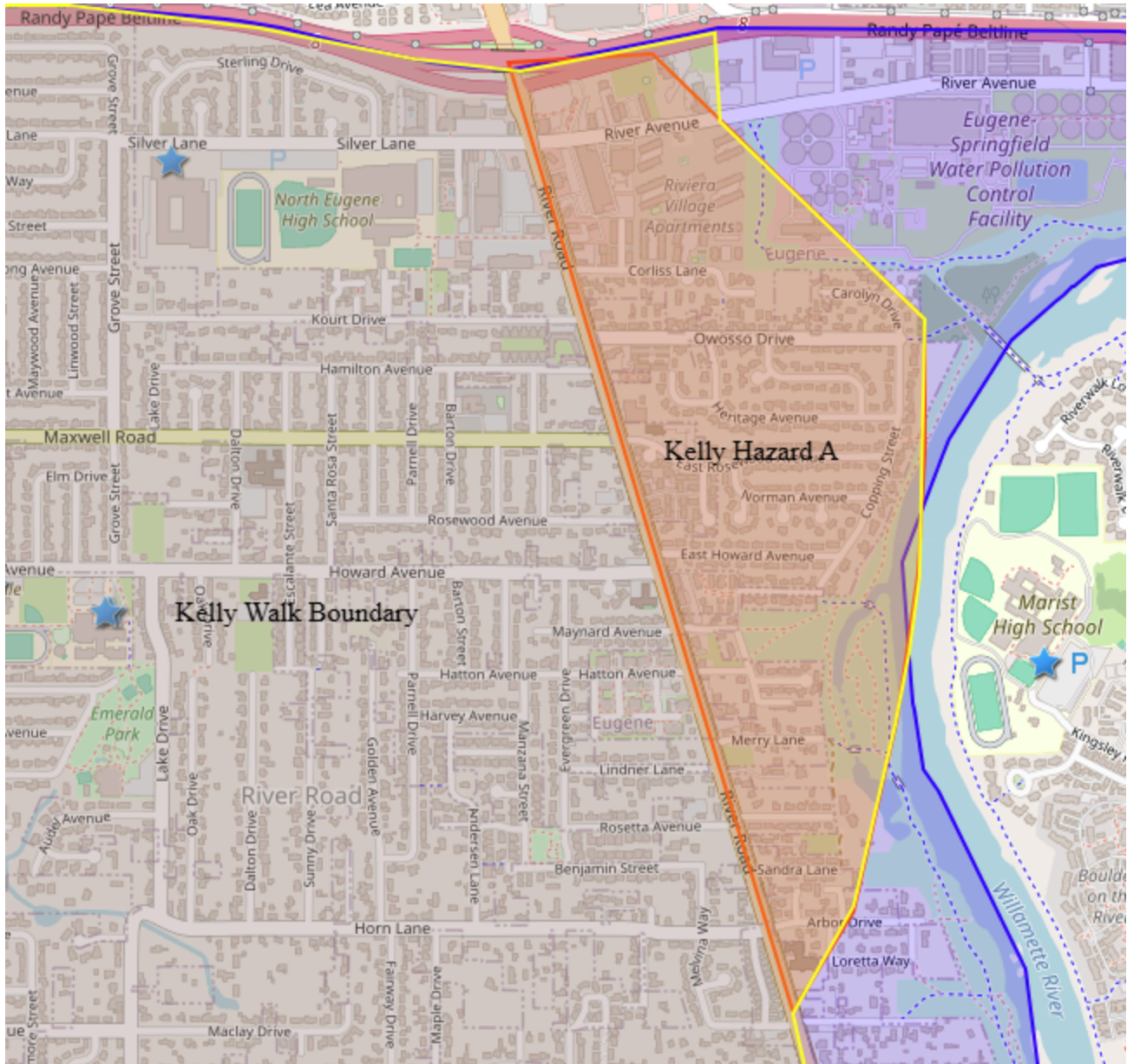


Kelly Middle School

Total Enrollment: 430

Approx. Number of Students Affected: 35

Hazard A: River Road - major arterial, high posted speed, crash history, difficult crossing

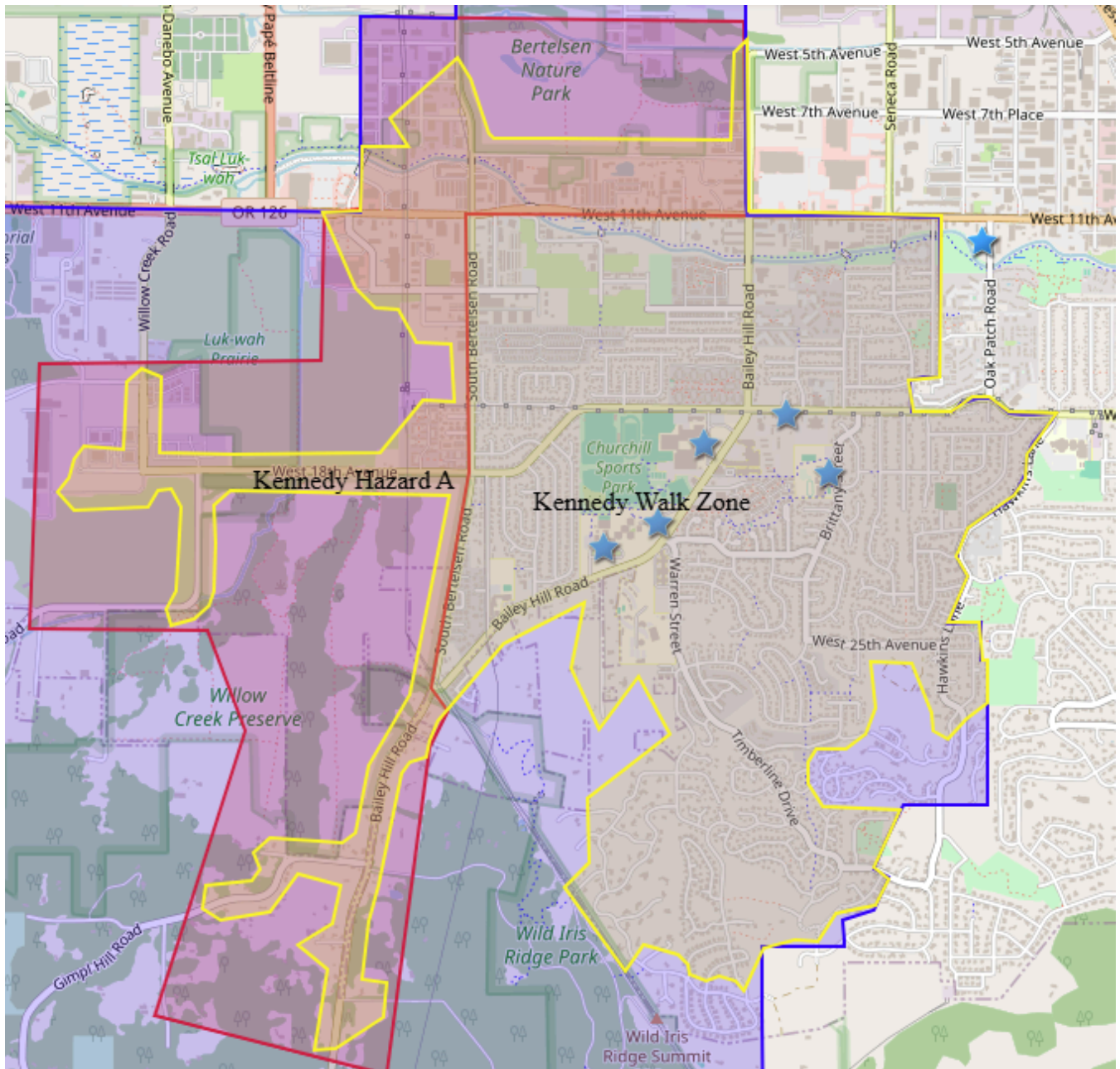


Kennedy Middle School

Total Enrollment: 355

Approx. Number of Students Affected: 20

Hazard A: Bertelsen Rd. between Bailey Hill & 18th - arterial, high posted speed, no walking or biking space, difficult crossing; Bailey Hill Road between Bertelsen Rd. and Klouts - arterial, high posted speed, little walking or biking space, difficult crossing; West 11th Avenue - major arterial, multiple lanes, crash history



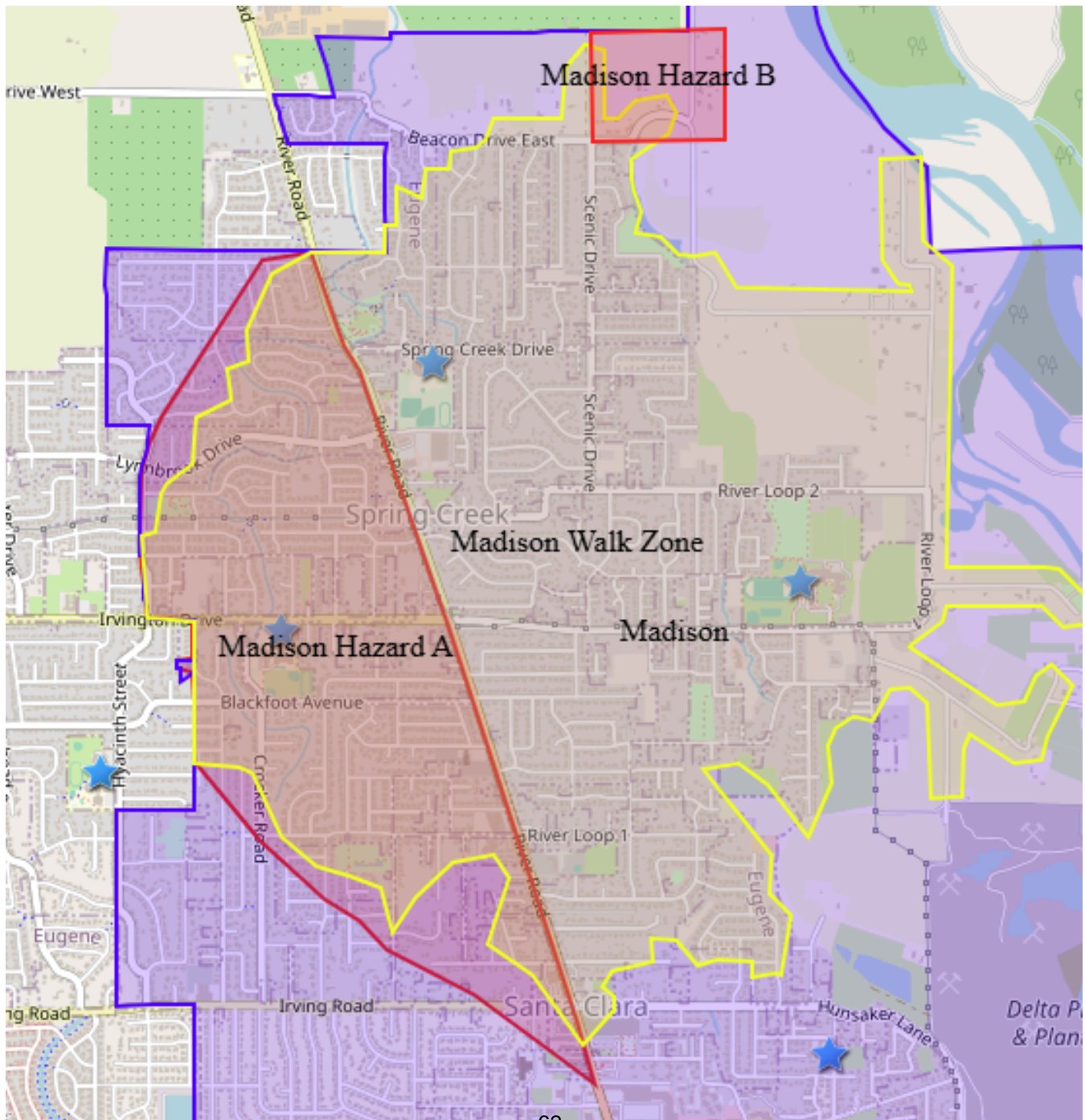
Madison Middle School

Total Enrollment: 413

Approx. Number of Students Affected: 76

Hazard A: River Road - major arterial, high posted speed, crash history, difficult crossing
Irving Road - crash history, difficult crossing, high speed

Hazard B: Beacon, east of Scenic - no walking space, blind curve, no lighting, high posted speed



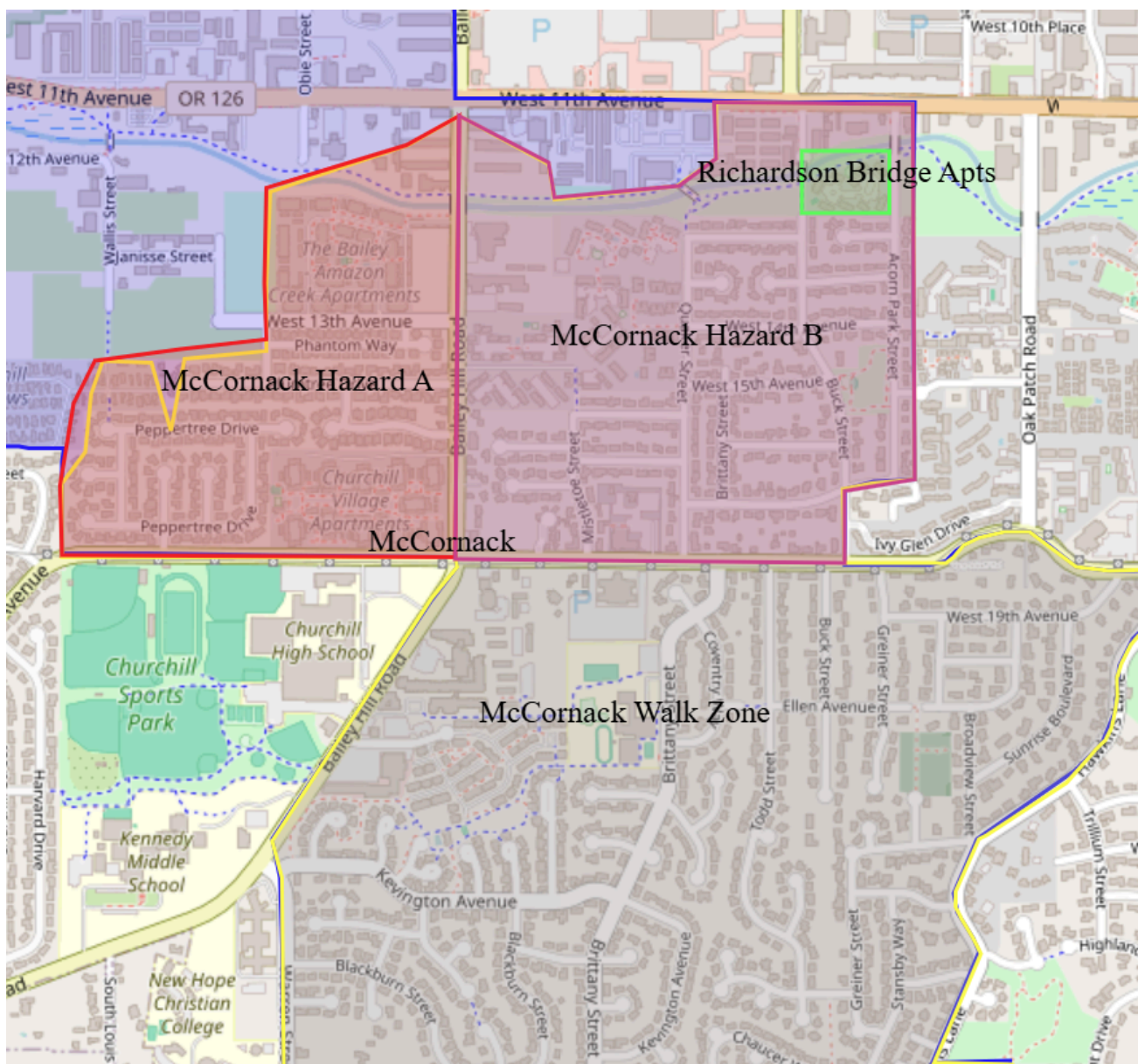
McCornack Elementary

Total Enrollment: 313

Approx. Number of Students Affected: 146

Hazard A: Bailey Hill Road – north of 18th - arterial, high posted speed, crash history, difficult crossing

Hazard B*: West 18th Avenue between Bailey Hill Road and Buck Street - arterial, crash history, difficult crossing *Use a crossing guard at 18th and Brittany for this location rather than bus. The projected annual cost for busing is \$6,731. The cost for 1.25 hours of crossing guard time/day is projected to be \$6,180.

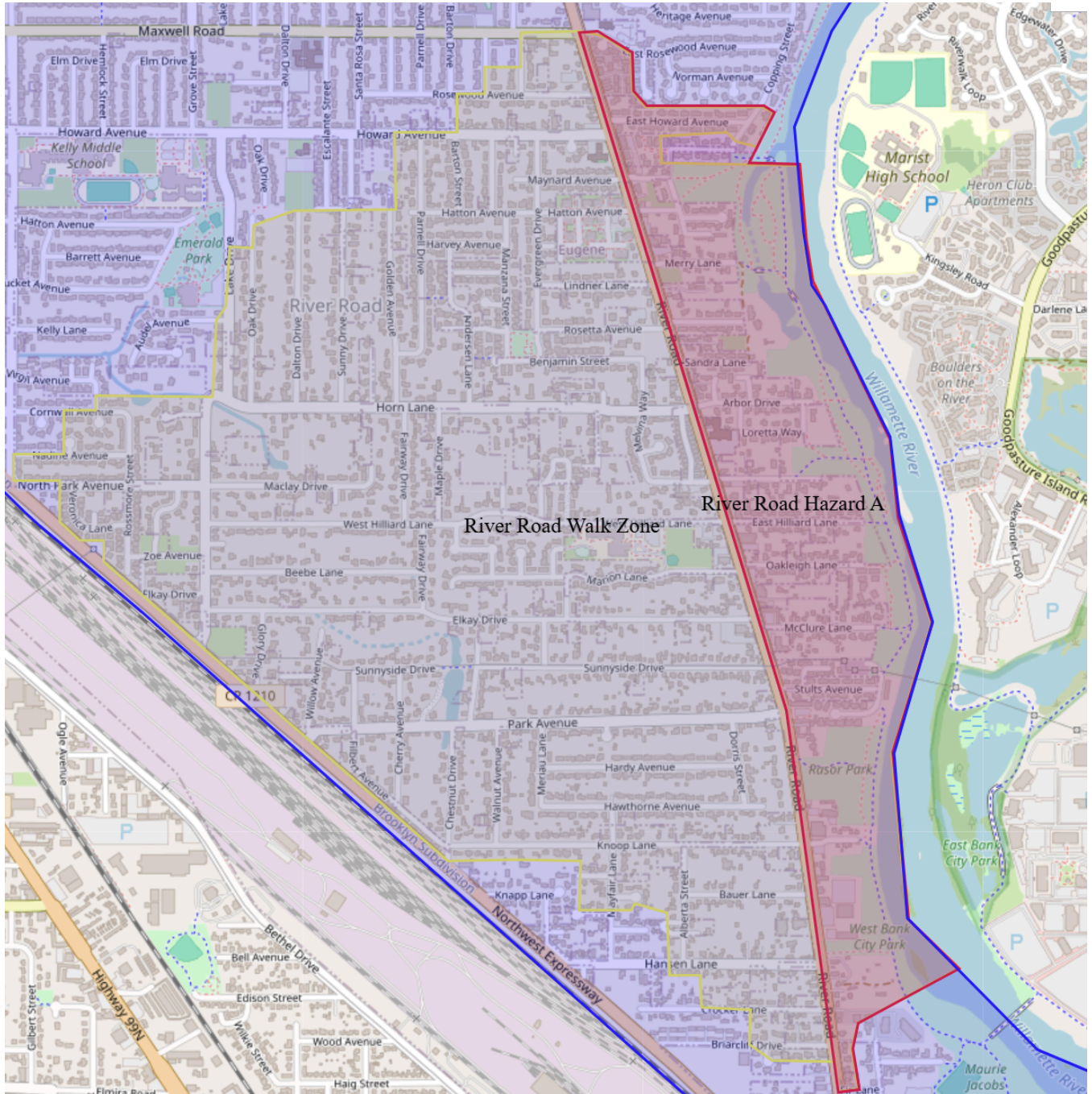


River Road Elementary

Total Enrollment: 436

Approx. Number of Students Affected: 24

Hazard A: River Road - major arterial, high posted speed, crash history, difficult crossing



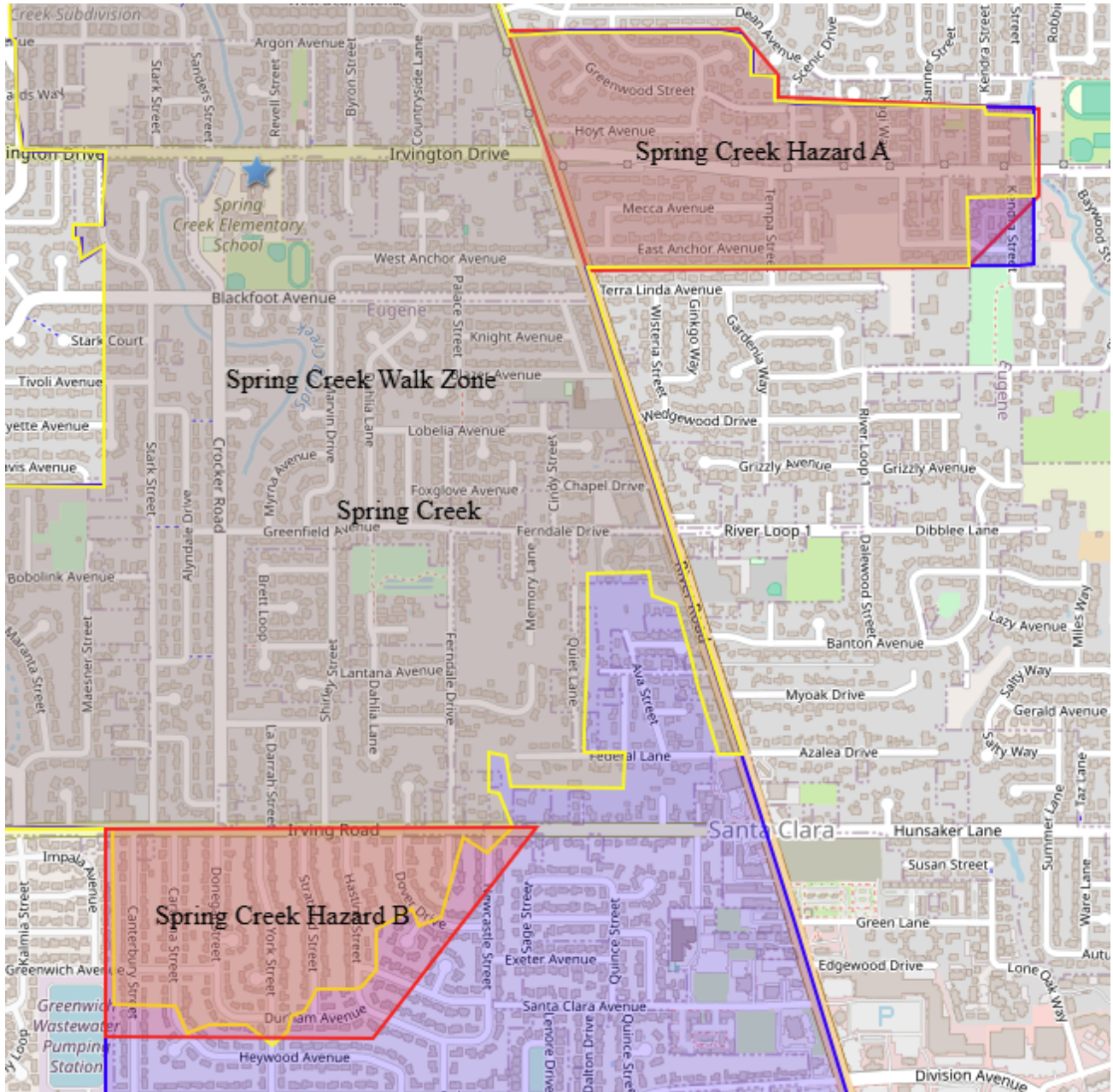
Spring Creek Elementary

Total Enrollment: 254

Approx. Number of Students Affected: 51

Hazard A: River Road - major arterial, high posted speed, crash history, difficult crossing

Hazard B: Irving Road – major arterial, high posted speed, crash history, difficult crossing



Spencer Butte

Total Enrollment: 351

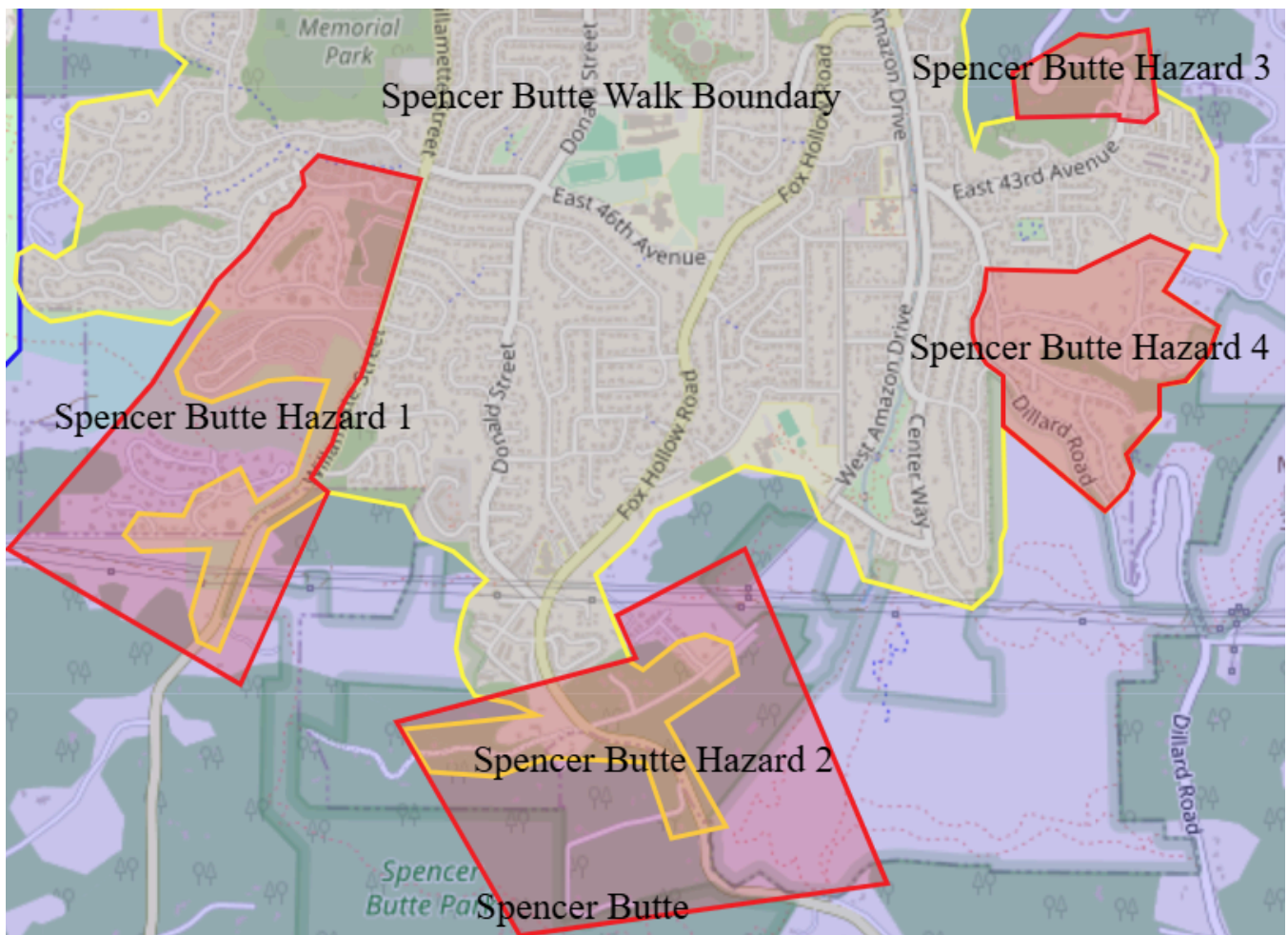
Approx. Number of Students Affected: 20

Hazard 1: Willamette Southwest of 46th to past 52nd - high crash history, high posted speed limit, arterial, difficult crossing to sidewalk

Hazard 2: Fox Hollow past Woodleaf to Owl/West Amazon - no walking space, curves limit visibility, no lighting, difficult crossing

Hazard 3: Dillard Road just south of Snell - no walking space, difficult crossing, dangerous intersection at Dillard/Old Dillard, high posted speeds, no lighting

Hazard 4: North Shasta Loop (off East 43rd to Shasta View) - no walking space, difficult crossing, curves, road floods, no lighting

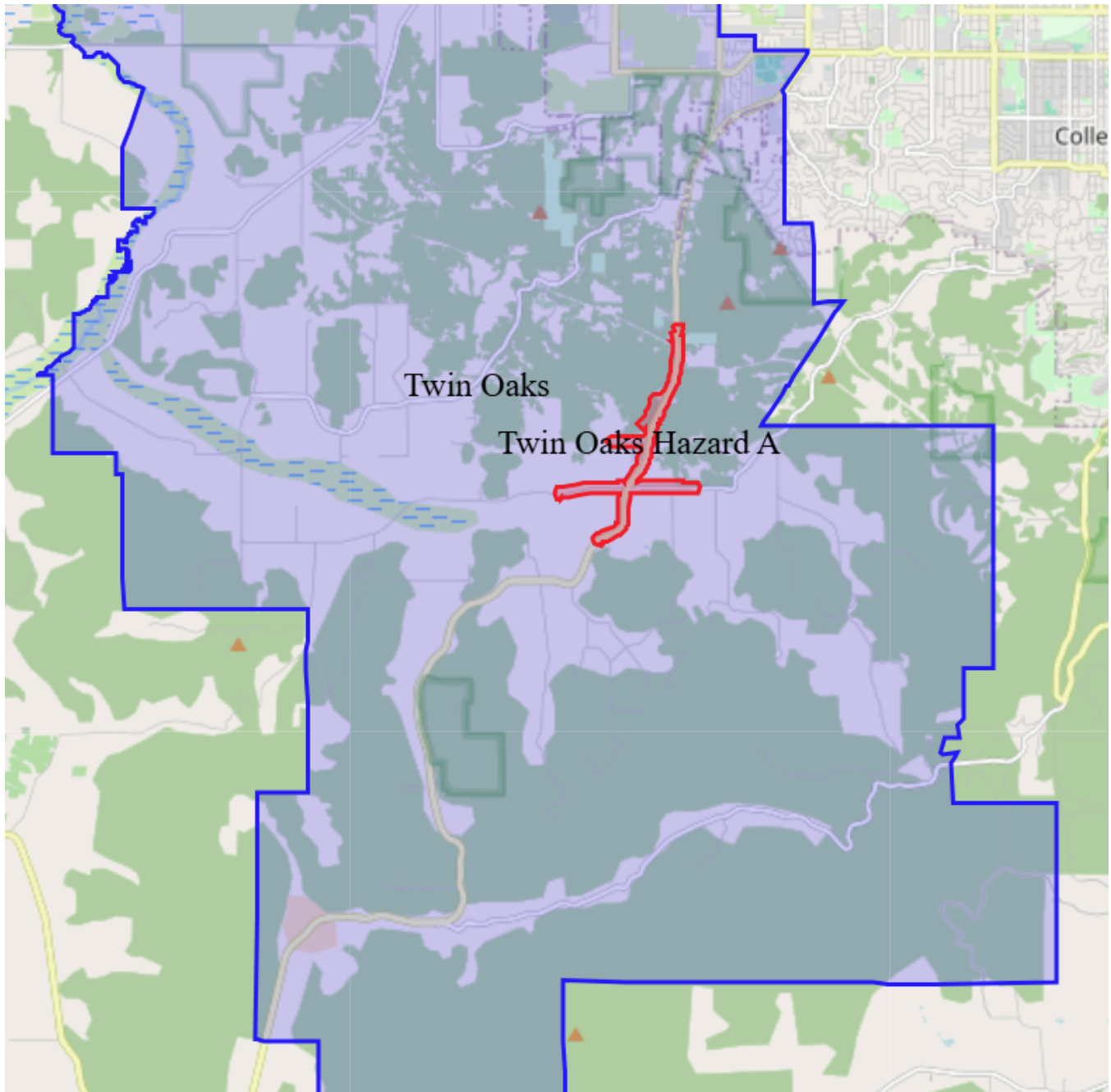


Twin Oaks Elementary

Total Enrollment: 216

Approx. Number of Students Affected: 2

Hazard A: Bailey Hill Road - difficult crossing, high speed, no safe walking/biking space;
Spencer Creek Road/Lorane Highway - difficult crossing, high speed, no safe walking/biking space



Attendance Informed Equity Transportation Program

In order to support equitable outcomes for all students, 4J is proposing to establish transportation eligibility for elementary students living in certain low-income housing complexes based on attendance concerns. The rationale for this proposal is that there is an identifiable link between attendance rates and academic outcomes, and consistent access is an issue for certain housing complexes. Transportation eligibility would remove an access barrier and support higher attendance.

Methodology

Three criteria points were established to ensure even application across the district.

- A qualifying low-income housing complex will have 10 or more units, and will be identified either as housing for qualifying low-income Lane County residents by a low-income housing agency recognized by Lane County or as an emergency shelter for families experiencing homelessness in Lane County.
- A qualifying low-income housing complex will be located more than 0.7 miles from the elementary school for the school board specified attendance area.
- A qualifying low-income housing complex will have fewer than 70% of the students residing at that complex attending 90% or more school days at the elementary school for the school board specified attendance area. (As measured for the first semester of the 2024-2025 school year.)

Descriptions and Maps of Attendance Informed Equity Transport

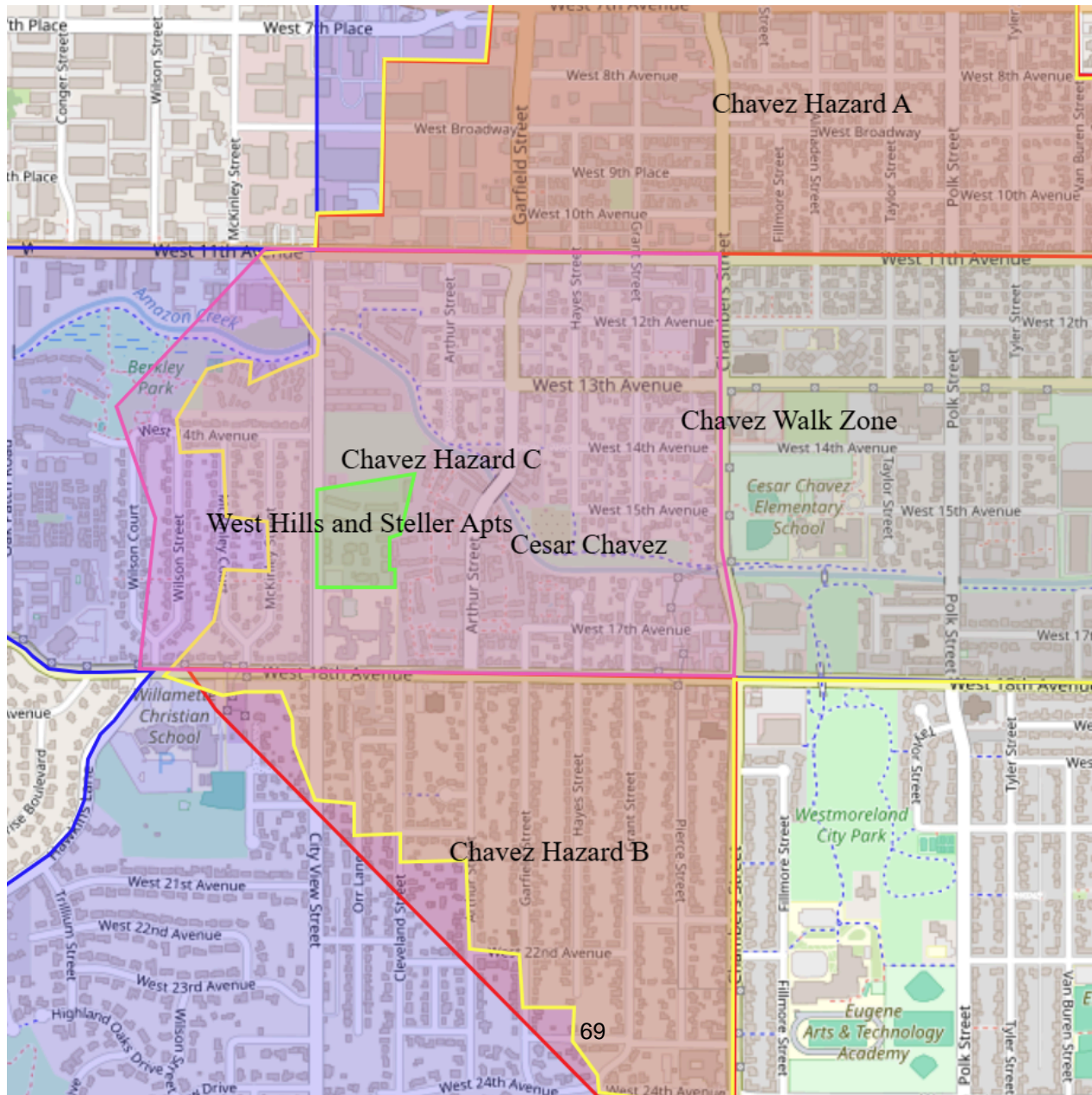
Cesar Chavez Elementary

Total Enrollment- 368

Housing Complex- West Hills and Steller Apts. (1459-1563 City View St)

67% of students at or above 90% attendance

Approx. Number of Students Affected- 21



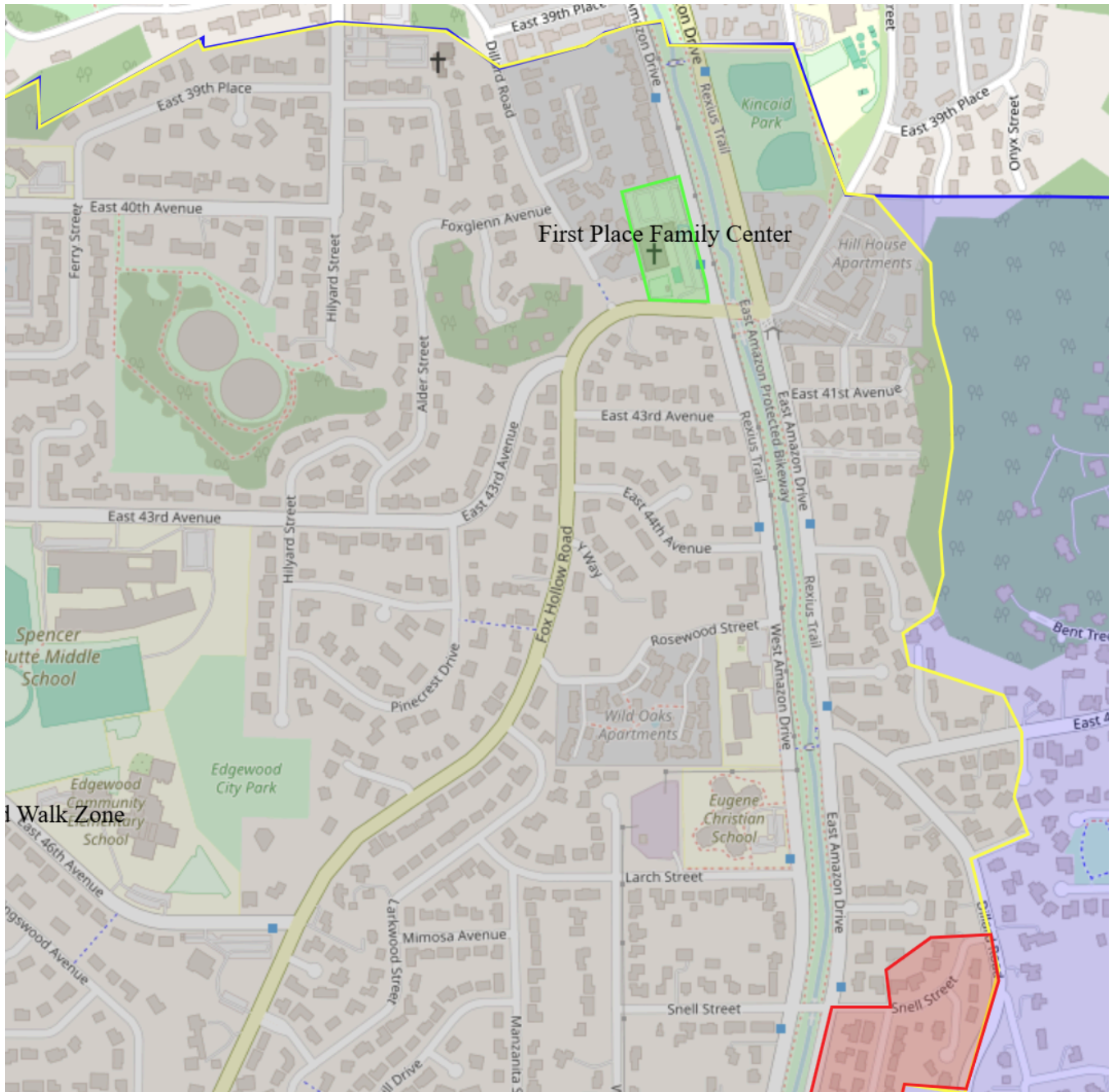
Edgewood Elementary

Total Enrollment- 429

Housing Complex- First Place Family Center (4060-4080 W Amazon)

No students at or above 90% attendance

Approx. Number of Students Affected- 4



Holt Elementary

Total Enrollment- 488

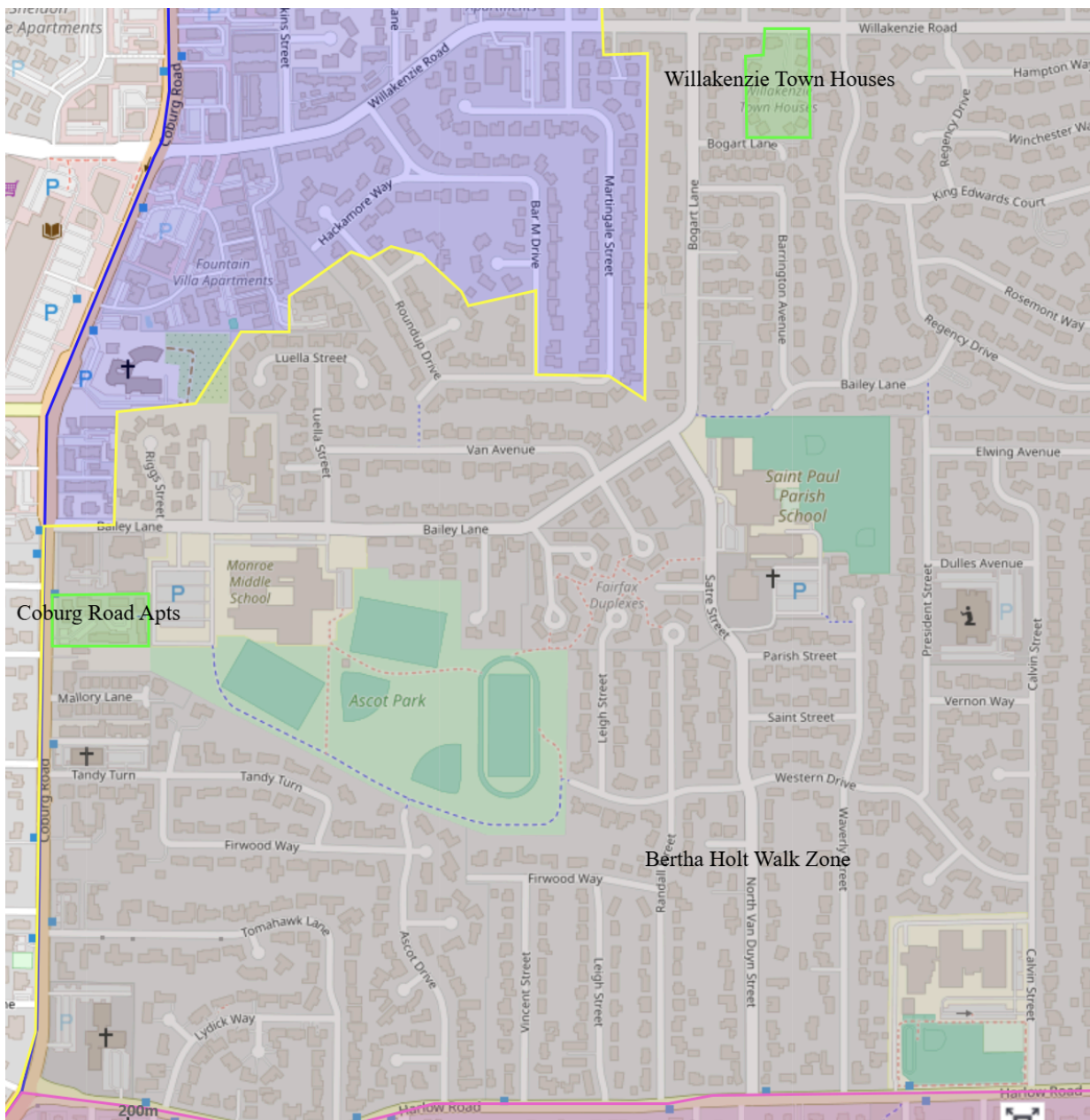
Housing Complex- Coburg Road Apts (1121-1139 Coburg Rd)

60% of students at or above 90% attendance

Housing Complex- Willakenzie Town Houses (3202-3248 Willakenzie Rd)

62% of students at or above 90% attendance

Approx. Number of Students Affected- 18



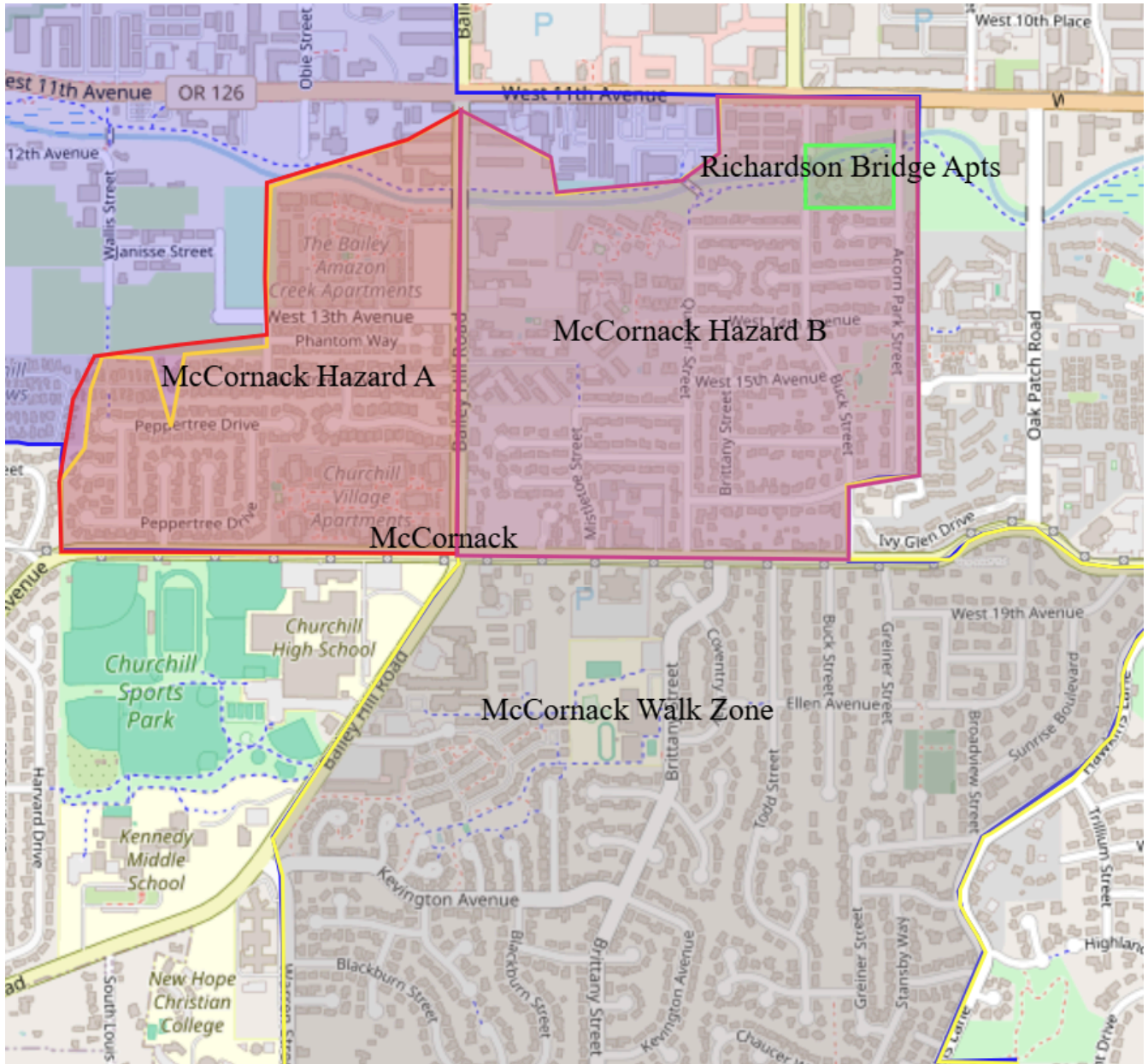
McCornack Elementary

Total Enrollment- 313

Housing Complex- Richardson Bridge Apts. (1202-1238 Acorn Park St)

36% of students at or above 90% attendance

Approx. Number of Students Affected- 11



Equity Informed Temporary Transport Program

4J will continue to pilot an Equity Informed Temporary Transport Program for the school years 2025/26 and 2026/27. During this time 4J will document program use, and evaluate its efficacy regarding attendance and successful transitions away from temporary district provided transportation.

Rational- At times transportation based attendance barriers are identified that otherwise would not normally qualify a student for district provided transportation. When these barriers are identifiable as an equity concern, this program seeks to remove this barrier by providing district transport for up to three months while long-term solutions are sought.

Process and expectations

- Each equity informed transportation plan will be established and evaluated on a case-by-case basis. A serious attendance concern coupled with an equity issue that negatively impacts accessing the educational facility must be demonstrated to utilize this program.
 - Equity considerations may include, but not be limited to: poverty, hate and bias, language barriers/new arrivals, student or family medical problems, and general education director equity informed placements.
- Each equity informed transportation plan will outline a path to resolve the circumstances that challenges the students' ability to get to and from school by other means. District support team and the family will work together to develop and execute this plan.
 - The District support team may include Building administration, Office of Family Support, Safe Routes to School, Transportation, Student Services (SSD), Equity In Academic Advancement Managers, Office of School Choice, and School Safety and Emergency Management.
- All equity informed transportation plans, must be reviewed by, and have the approval of both an Educational Director, and the Director of Transportation. Directors will evaluate equity informed transportation plan proposals in keeping with district values outlined in Board Policies and utilizing the district Equity Decision Making Tool.

Safety Informed Temporary Transport Program

4J will add certain safety concerns to the Temporary Transport Program pilot. As with the Equity Informed Transport Program, 4J will document program use and evaluate the efficacy of the program related to attendance and a transition away from district-provided transportation.

Rational - In some cases, students face hazards that temporarily make their route to school either impassible or require a detour that lengthens their route beyond the Walk Zone designations (1 mile for elementary, 1.5 miles for secondary). This program seeks to provide transportation for the duration of the hazard in order to maintain attendance.

Process and Expectations

- Each safety informed temporary transportation plan will be evaluated on a case by case basis annually and as-needed. Cases will be assessed by the Directors of Safety and Transportation and could be related to any of the factors listed below that eliminate safe transportation corridors or that lengthen the route beyond the walk zone:
 - Temporary environmental hazards;
 - Major construction projects;
 - Violent crime;
 - Legal residence of a sex offender;
 - Known location of drug dealing or production;
 - Public drug use and intoxication;
 - Otherwise unsafe environs as determined by the Directors of Safety and of Transportation.
- Each safety informed transportation plan will set a timeline for district-provided transportation based on those circumstances that challenges the students' ability to get to and from school by other means. District support team will collaborate to develop and execute this plan.
- The District support team may include Building administration, Office of Family Support, Safe Routes to School, Transportation, Student Services (SSD), Office of School Choice, and School Safety and Emergency Management.
- All safety informed temporary transportation plans must be reviewed by and have the approval of both the Director of Safety and the Director of Transportation in keeping with district values outlined in Board Policies.

Appendix A- General Transportation Guidelines

Eugene School District 4J

Code:EEA

Adopted: 7/02/73

Revised/Readopted: 7/01/92; 6/01/94; 12/11/02; 6/16/10; 8/15/18; 3/04/20

Orig. Code: EEA; 5640.1; 5640.3

Student Transportation Services

School transportation services will be provided for students to and from school and for transporting students to and from curricular and extracurricular activities sponsored by the district, for transporting from one school or facility to another, and for approved school-sponsored field trips that are extensions of classroom learning experiences. Transportation will be provided for homeless students to and from the student's school of origin¹ as required by the No Child Left Behind Act of 2001 (NCLBA). These services shall be provided throughout the regularly scheduled year and during the regular school day as determined by the Board.

Elementary students (grades K-5) who live more than one mile from school will be transported. Secondary students (grades 6-12) who live more than one and one-half miles from school will be transported. Mileage exceptions for health, safety or disability will be made in accordance with the district's approved supplemental plan.

Students living within specified attendance boundaries shall receive transportation services to their respective schools. In addition, students, including those receiving special education, may be eligible for transportation for health or safety reasons.

Miles from school will be determined by the transportation supervisor in accordance with OAR 581-023-0040 (1) (c).

The district may use Type 10 School Activity Vehicles to transport students from home to school, school to home and from district-sponsored activities.

The district may also provide transportation using federal funds² or through cooperative agreements with local victims assistance units for a student to attend a safe district school³ out of the student's attendance area for any student who is a victim of a violent criminal offense occurring in or on the grounds of the school the student attends or the student attends a school identified as persistently dangerous.

¹ School of origin means the school that the student attended when permanently housed or the school in which the student was last enrolled.

²Federal funds means funds available through Title IV, Part A, and Title V, Part A.

³ If there is not another school in the district to which students can transfer, districts are encouraged, but not required, to explore other appropriate options, i.e., an agreement with a neighboring district.

If there are no other schools within the district a student may transfer to, the district may establish a cooperative agreement with other districts in the area for a transfer. Transportation for students who transfer for such purposes will be provided in accordance with the agreement.

Students attending any private, parochial or public charter school under the compulsory school attendance laws will, where the private, parochial or public charter school is along or near the bus route, be provided equally the riding privileges given to public school students.

Preschool students with disabilities who have transportation as a related service and children from birth to age three who are enrolled in an eligible program shall be provided home to school transportation.

A seat that fully supports each person and meets the minimum standards and specifications of law will be provided at all times. A person who weighs 40 pounds or less must be properly secured with a child safety system that meets the minimum standards and specifications established by the Oregon Department of Transportation under ORS 815.055. A person over 40 pounds or who has reached the upper weight limit for the forward-facing car seat must use a booster seat until he/she is four feet nine inches tall or age eight and the adult belt properly fits.⁴ A person who is taller than four feet nine inches or eight years of age or older must be properly secured with a safety belt or harness that meets the requirements under ORS 815.055. In accordance with ORS 811.210 and 811.215 vehicles in excess of 10,000 pounds used for student transportation are exempt from statutory requirements unless they have been equipped with lap belts. Vehicles in excess of 10,000 pounds that have been equipped with lap belts must meet child car seat requirements as set forth in law.

School buses carrying students will be considered extensions of the school experience. All students using school transportation will abide by the code of conduct posted in each school bus or school activity vehicle. Violations of such code, as well as other conduct which is improper or which jeopardizes the safety of self or others, will be reported by the school bus driver to the supervisor. The transportation supervisor will, as soon as possible, inform the appropriate principal of such occurrence. Violators may be denied use of transportation for a period of time as deemed proper by the principal and transportation supervisor.

The principal or designee shall ensure transportation officials and drivers receive notification of students having special medical or behavioral protocols identified in student records.

Appropriate training related to specific protocols, including confidentiality requirements, will be provided to drivers.

The school bus driver will be responsible for the school bus at all times from departure until return. The driver will not participate in any activities that might impair his/her driving abilities.

⁴ "Proper fit" means the lap belt of the safety belt or safety harness is positioned low across the thighs and the shoulder belt is positioned over the collarbone and away from the neck.

The district will comply with all state and federal laws and regulations pertaining to school bus transportation

Transportation Between Schools and Day-Care Facilities The district seeks to assist parents, whenever possible, in providing safe, responsible day care for their school-aged children during non-school-working hours. The district will only provide transportation to daycare facilities with the school attendance boundaries and outside the one-mile walking boundary. The district may make exceptions for hazardous walk areas.

The superintendent is responsible for establishing criteria and procedures to implement this policy.

END OF POLICY

Legal Reference(s):

ORS 327.006	ORS 815 .055	OAR 581-053-0031
ORS 327.033	ORS 815 .080	OAR 581-053-0040
ORS 327.043	ORS 820 .100 to-820.190	OAR 581-053-0053
ORS 332.405		OAR 581-053-0060
ORS 332.415	OAR 581-021-0050 to-0075	OAR 581-053-0070
ORS 339.240 to-339.250	OAR 581-022-1530	OAR 581-053-0210
ORS 343.155 to-343.246	OAR 581-023-0040	OAR 581-053-0220
ORS 343 .533	OAR 581-053-0002	OAR 581-053-0230
ORS 343 .155 to-343.243	OAR 581-053-0003	OAR 581-053-0240
ORS 811 .210	OAR 581-053-0004	OAR 735-102-0010
ORS 811 .215	OAR 581-053-0010	

No Child Left Behind Act of 2001, 20 U.S.C. §§ 6315, 7912.

Elementary and Secondary Education Act (ESEA) Flexibility Waiver, July 18, 2012.

McKinney-Vento Homeless Education Assistance Improvements Act of 2001, 42 U.S.C. §§ 11431-11435 (2005).

Cross Reference(s):

EEAC - School Bus Safety Program

EEACC - Student Conduct on School Buses

Student Transportation Services - EEA

Appendix B- 581-023-0040 Approved Transportation Costs

581-023-0040

Approved Transportation Costs for Payments from the State School Fund

(1) Definitions for the purpose of this rule:

(a) “Elementary School Student” means, notwithstanding any other OAR or statute, pupils attending a school offering only an elementary curriculum, any combination of grades K through 8;

(b) “Secondary School Student” means, notwithstanding any other OAR or statute, pupils attending a school offering any secondary curriculum for grades 9, 10, 11, or 12. Additionally, all students attending a school designated by the local school board through board action as a junior high school or middle school may be considered secondary students;

(c) “Local School Board” means, notwithstanding any other OAR or statute, the local school board for the district in which the student’s legal residence is physically located. Local school boards are not required to provide transportation for students who have requested and received approval to attend a school other than that designated by the local school board for students living in their specified attendance area;

(d) “Manufacturer’s Rated Capacity” means the number of students to be used in the calculations specified in paragraph (5)(n)(B) of this rule and described below:

(A) Buses transporting only elementary students will have a passenger capacity as stated on the manufacturer’s identification plate;

(B) Buses transporting only high school students, grades 9 through 12 will have a passenger capacity based on two students for each 39 inch bus seat;

(C) Buses transporting mixed groups from grades K–12 (in any combination) or groups of only junior high or middle school students will have a passenger capacity based on 2.5 students for each 39-inch bus seat.

“EXAMPLE: A bus with a manufacturer’s passenger capacity stated on the identification plate of 72 would have the following ratings: elementary — 72, high school only — 48, mixed groups — 60, middle school and junior high school — 60.”

(e) “Mile(s) from School” means the distance a student lives from school, measured from the closest, reasonable, and prudent point between the school property identified by the local board for that pupil’s attendance and the property where the pupil lives. The distance will be measured over the shortest practicable route on maintained public roadways or over existing pedestrian facilities or pedestrian facilities capable of meeting the requirements listed in ORS 332.405(4);

(f) “Patron” means any individual, organization, or entity that is able to use student transportation services except for charter schools (as defined in ORS 338) or a public agency (described in ORS 339.133(4), ORS 327.527, ORS 327.540 or ORS 327.390) if the school or agency reimburses school districts up to one hundred percent (100%) of incurred transportation costs pursuant to ORS 338.145, 339.133(4), ORS 327.527, ORS 327.540 or 327.390.

(g) "Supplemental Plan" means a plan adopted by local school board resolution identifying groups or categories of students who live within the 1 and 1.5 mile limitations and require transportation based on health or safety reasons, including special education. Supplemental plan approvals may be ordered by the State Board of Education or its designated representatives. The State Board shall have the right of final review of any actions regarding supplemental plans. Appeals will be directed to the State Board for final consideration. The Plan must include the following:

(A) The approximate number of students to be transported based on the plan;

(B) The health or safety reasons cited for providing transportation;

(C) The local board resolution specifying the supplemental plan as submitted; and

(D) Any additional information or documentation supporting the supplemental plan deemed appropriate locally.

(h) "Alternative Transportation," and "Active Transportation costs" have the definitions given in ORS 327.033.

(i) "Suitable and sufficient" means transportation that is appropriate for a particular student or group of students based on:

(A) The age of the student;

(B) The physical or mental capabilities of the student;

(C) The distance the student is to be transported; and

(D) The safety of the student to be transported.

(2) Approved transportation costs shall include those costs incurred in transporting pupils to and from instructional programs during the regularly scheduled school term within the limitations specified by ORS 327.006 and 327.033. Approved transportation costs may include costs incurred in transporting students participating in extended school year programs eligible for funding from the State School Fund.

(3) Approved transportation costs shall include those district expenditures associated with:

(a) Home-to-school transportation of elementary school pupils who live at least one mile from school;

(b) Home-to-school transportation of secondary school pupils who live at least one and one-half miles from school;

(c) Transportation of pupils between educational facilities either within or across district boundaries, if the facilities are used as part of the regularly-scheduled instructional program approved by the Board;

(d) Transportation of pupils for in-state field trips when such represents an extension of classroom activities for instructional purposes, and shall include out-of-state destinations within 100 miles of the Oregon border;

(e) Transportation of pupils home to school for whom a supplemental plan has been approved by the State Board of Education in addressing safety, health, and special education needs;

(f) Transportation of preschool children in Early Childhood Special Education Services having an Individual Family Service Plan requiring transportation and preschool children receiving Early Intervention Services under the authority of ORS 343.533.

(g) School to home transportation following extended school day instructional programs for:

(A) Elementary school pupils who live at least one mile from school;

(B) Secondary school pupils who live at least one and one-half miles from school.

(h) For the 2020-21 school year, maintaining an adequate level of pupil transportation services while school districts are administering Comprehensive Distance Learning in response to the COVID-19 pandemic.

(4) Approved Alternative Transportation costs:

(a) Include those district expenditures associated with:

(A) The facilitation of Active Transportation for human-powered forms of travel, including walking or bicycling, between home and school for students who live less than three miles from school. These costs may include:

(i) A pedestrian or bicycle group;

(ii) A crossing guard; or

(iii) Staff time required for coordinating active transportation options.

(B) The facilitation of Public Transportation between home and school for secondary school students. This may include staff time required for coordinating public transportation options.

(b) Require that new positions or extra duty opportunities created as a result of the implementation of Alternative Transportation will be direct employees of the school district.

(c) Do not include costs for transportation that is subcontracted by a school district to a private transportation provider.

(5) Approved transportation costs shall exclude those district expenditures associated with transportation for the following unless the school program is required under provisions of the Individuals with Disabilities Education Act, ORS 343.533 or 339.010 through 339.090 and 339.250:

(a) Pupils living within the limits prescribed in ORS 327.006(2) for whom no supplemental plan has been approved by the State Board;

(b) Activity trips other than for instructional purposes;

(c) Athletic trips;

(d) School lunch purposes;

(e) Summer school;

(f) Adult education;

- (g) Evening school;
 - (h) Preschool and/or nursery school;
 - (i) Board and room in lieu of transportation associated with field trips;
 - (j) Transportation facility and staff costs other than those directly related to approved pupil transportation activities.
- (6) The computation shall be made as follows:
- (a) Pupil Transportation Salaries;
 - (b) Pupil Transportation Supplies, Equipment, Repairs, and Maintenance;
 - (c) All contracted Transportation;
 - (d) Travel of Pupil Transportation Personnel;
 - (e) Employee Benefits on Pupil Transportation Salaries;
 - (f) Pupil Transportation Insurance;
 - (g) Payments in Lieu of Transportation;
 - (h) Other Expenses of Pupil Transportation;
 - (i) Payments to Other Districts for Pupil Transportation;
 - (j) Leases and Rentals;
 - (k) Depreciation:
 - (A) Depreciation of Garage, but this shall not include land;
 - (B) Depreciation of Buses that are used at least 50% for reimbursable mileage.
 - (C) Shall include the costs to the district to retrofit, repower, or to replace as defined in ORS 468A.795, school buses for the purpose of reducing or eliminating diesel engine emissions. These costs:
 - (i) Shall not include the costs paid with moneys received from the state by a school district from the Clean Diesel Engine Fund that are described in 468A.801 (2)(a); and
 - (ii) Shall include costs to paid with moneys received from the state as allowed by the Environmental Mitigation Trust Agreement as defined in ORS 468A.801 (2)(c).
 - (l) Total of subsections (5)(a) through (k) of this rule;
 - (m) Deduct (if cost is included in detail above):
 - (A) Payments Received from Other Districts and from Patrons for reimbursable transportation;
 - (B) Non-reimbursable Transportation Costs;

(i) For 2021 – 22:

(I) Number of miles at \$2.86 Per mile for all school buses and school activity vehicles having a manufacturers designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at \$1.43 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(ii) For 2022 – 23:

(I) Number of miles at \$2.96 Per mile for all school buses and school activity vehicles having a manufacturers designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at \$1.49 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(iii) For 2023 – 24:

(I) Number of miles at \$3.18 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at \$1.60 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(iv) For 2024 – 25:

(I) Number of miles at \$3.29 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at \$1.65 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(v)(I) Those local school board certified marginal costs attributable to services provided to students who are not eligible for home-to-school transportation under section 3, calculated and documented as follows: Documentation maintained by local district shall include: bus and route identification, school(s) being served, number of eligible students on board, number of ineligible students on board;

(II) Calculation of marginal costs shall be as follows: District Cost Per Mile of bus operation divided by the total number of students transported on each bus to derive an average cost per student. The cost per student multiplied by the number of ineligible students and the number of miles transported provides the amount for deduction. Example: Cost per student = district cost per bus mile - number of students on bus; Total Deduction = cost per student x ineligible students x number of miles transported.

(III) No deduction will be made for transportation inside prescribed limits if the local board certifies student demographics would require student bus rides to or from school of more than one hour if the bus is routed in a manner making it accessible to the number of eligible students living outside the prescribed mileage limit equal to 130 percent of the bus manufacturer's rated capacity; or

(IV) The local school board certifies that buses are routed in a manner to serve at least the number of eligible students living outside the prescribed mileage limits equal to 130 percent of the bus manufacturer's rated passenger capacity; and

(V) In either of the aforementioned situations, no additional costs have been incurred by the district for the identified service.

(C) State and Federal Receipts for Transportation, except those apportioned under ORS 327.006 or third party Medicaid payments for transportation, if used to support expenditures in subsections (5)(a) through (l) of this rule;

(D) Rental or Lease Payments from Private Contractors;

(E) The percentage of transportation facility depreciation commensurate with the percentage of the total district fleet value based upon purchase price (see subsection (6)(k) of this rule) represented by non-pupil transportation equipment. Examples of nonpupil transportation equipment would include the following: lawnmowers, tractors, backhoes, trucks, pickups, cars, trailers, snow blowers, etc.

(n) Total Deductions ((5)(m)(A)+(m)(B)+(m)(C)+(m)(D)+ (m)(E));

(o) Approved Cost ((5)(l) minus (5)(n)).

(7) In the above computation, the following definitions apply:

(a) Pupil Transportation Salaries. Salaries and wages paid school bus drivers, assistants to driver, and that portion of salaries paid mechanics and other bus maintenance employees, supervisors of transportation, secretarial and clerical assistants, and persons assigned transportation oversight and coordination responsibilities attributable to the transportation program and documented through position descriptions and payroll records. No school district General Administration salaries may be included in this area;

(b) Pupil Transportation Supplies, Equipment, Repairs, and Maintenance. Costs of fuel, oil, lubricants, tires, tire repair, batteries, vehicle diagnosis and repair equipment identified as capital expenditures in the "Program Budget Manual," vehicle repair parts and supplies, repair of vehicles by other than the school district, garage maintenance and operation, and garage equipment repair and maintenance;

(c) All Contracted Transportation. Payments to parents and independent public or private contractors for transporting pupils from home to school, between educational facilities and for non-reimbursable activities enumerated in paragraph (6)(l)(B) of this rule; and fares to public carriers for transporting pupils from home to school and between educational facilities:

(A) If a district retains ownership of buses and garages and contracts for the operation of the transportation system with provision in the contract for lease or rental of the buses and garages, the contracted transportation cost shown should reflect the gross bid including the lease or rental payment. The lease or rental payment shall be deducted in the computation as reported in paragraph (5)(n)(D) of this rule;

(B) If the district retains ownership of buses and garages and participates in a transportation cooperative or consortium through an intergovernmental agreement, depreciation apportionment provided under ORS 327.033 will be disbursed directly to the district. No depreciation component is approved for cooperative-owned buses or garages.

(d) Travel of Pupil Transportation Personnel. Meals, lodging, mileage, per diem and other travel expenses of pupil transportation personnel, and private car mileage if paid to bus drivers for travel to and from the point where

school bus is parked if other than the central garage. The same travel expenses plus tuition or registration are included for attendance at Department of Education sponsored or presented pupil transportation training programs and seminars;

(e) Employee Benefits on Pupil Transportation Salaries. The district's contributions for employee benefits including social security and retirement, employee health insurance, workers' compensation, and unemployment insurance;

(f) Pupil Transportation Insurance. Payments for public liability and property damage, medical care, collision, fire and theft, and insurance on garages and shops;

(g) Payments in Lieu of Transportation. Payments for pupils' board and room in lieu of transportation, consistent with ORS 332.405(2);

(h) Other Expenses of Pupil Transportation. District-paid fees for school bus drivers' physical examinations; interest on bus or garage contracts payable including lease-purchase agreements if capitalized (see subsection (6)(k) of this rule);

(i) Payments to Other In-State or Out-of-State Districts for Transportation. Payments to other districts for approved pupil transportation costs;

(j) Leases and Rentals. Rental or lease payments for the use of land or buildings used for approved pupil transportation. Rental or lease payments for buses operated by district personnel for approved pupil transportation.

"NOTE: Only those leases which do not contain an option to purchase or application of rentals to purchase should be included in subsection (5)(j) of this rule. See subsection (6)(k) of this rule as to the proper treatment of other lease-purchase agreements."

(k) Depreciation. For purposes of computing depreciation, capitalized cost is defined to include the unit cost of the asset, exclusive of interest, for such assets purchased outright, by conventional contract, or by lease-purchase agreement if such agreement contains any provision to acquire ownership at the end of the agreement by application of a portion of the rentals paid or a terminal payment. The computation of the capitalized cost and the depreciation shall be according to the following:

(A) Portions of Garages and Other Buildings Used for Approved Pupil Transportation:

(i) Outright purchase (including purchase by conventional contract). For each outright purchase or purchase by conventional contract, each district shall report to the Oregon Department of Education, on the forms provided, the unit cost of the garage or other building purchased and the dollar amount of interest payments associated with such purchase. The purchase of land shall not be included in the Garage Depreciation. The capitalized value shall represent the unit cost, exclusive of interest. Depreciation shall be computed at an annual rate of four percent;

(ii) Lease-purchase agreements. For each lease-purchase agreement, the district shall report to the Oregon Department of Education, on the forms provided, the dollar amount of the agreement, the interest payments contained in the agreement, and the schedule of such interest payments contained in the agreement. Land shall not be included in the lease purchase agreement for the purpose of reimbursement. Subsequent to July 1, 1975, the capitalized value shall represent the lease-purchase price less any interest payments contained in the agreement. Depreciation shall be computed at an annual rate of four percent.

(B) Buses and Other Vehicles Used for Approved Pupil Transportation:

(i) Outright purchase (including purchase by conventional contract). For each outright purchase or purchase by conventional contract, each district shall report to the Oregon Department of Education, on the forms provided, the unit cost of the vehicle(s) purchased and the dollar amount of interest payments associated with such purchase. The capitalized value shall represent the unit cost, exclusive of interest. Depreciation shall be computed at an annual rate of ten percent;

(ii) Lease-purchase agreements. For each lease-purchase agreement, the district shall report to the Oregon Department of Education, on the forms provided, the dollar amount of the agreement, any applicable trade-in value, the dollar amounts of interest payments contained in the agreement, and the schedule of such interest payments contained in the agreement. The capitalized value of the vehicles shall represent the lease-purchase price including the trade-in allowance less interest payments contained in the agreement. Depreciation shall be computed at an annual rate of ten percent;

(iii) Lease agreements. If the district is leasing its buses under a lease agreement, the district shall report the annual lease cost. A lease agreement as used in this paragraph means an agreement whereby the lessor retains title to the buses being leased to the lessee school district and the title to the buses is never received by the lessee. Under such a lease agreement, the use of the buses by the lessee is limited by the term of the lease. If there is an auxiliary agreement either written or oral whereby at the end of the lease term, the title of the buses shall pass to the lessee school district, the agreement is not a lease agreement as described in this paragraph but is a lease-purchase agreement as outlined in subparagraph (ii) of this paragraph. The lease payment made by a school district obtaining the use of buses pursuant to a lease as defined in this paragraph shall be used in the computation of the reimbursement in place of the depreciation set forth in subparagraphs (i) and (ii) of this paragraph.

(C) Deductions:

(i) Payments Received from Other Districts and from Patrons. Money received from other school districts, parents, guardians, or students for transportation if paid in support of expenditures listed in subsections (5)(a) through (l) of this rule;

(ii) Nonreimbursable Transportation Costs. Actual bus mileage of excludable trips shall include the actual mileage in district owned or contracted buses for transportation for activity trips, athletic trips, school lunch purposes, summer school, adult education, evening school, nursery school, and any other nonreimbursable purposes. Such mileage shall be deducted at the rate indicated in subsection (5)(m)(B) of this rule. The rate of deduction may be reviewed periodically by the State Board of Education and adjusted accordingly;

(iii) State and Federal Receipts for Transportation. All state and federal receipts for transportation expenditures, exclusive of funds apportioned under ORS 327.006 and 327.033, that have been included in subsection (5)(a) through (l) of this rule;

(iv) Rental or Lease Payments from Private Contractors. Payments received from private contractors for the use of district owned buses and garages in the operation of the pupil transportation system by the private contractor. This item must be shown as Revenue Code 1930 in the school district audit and the gross payments to the contractor must be included in subsection (5)(c) of this rule.

(8) Each district shall maintain a record, by purpose, of total pupil transportation miles and shall submit a report of such to the Oregon Department of Education on the form provided. The accuracy of such records shall be certified by the district clerk.

(9) If an education service district offers a special service under the provisions of section (4) of ORS 334.175, including home-to-school transportation that would qualify for reimbursement under the provisions of ORS 327.006 if provided by a local school district, the following procedure in crediting the transportation expenditure to the local district may be employed:

(a) The education service district shall compute approved home-to-school transportation costs as provided in section (4) of this rule;

(b) The approved costs so determined shall be billed to and paid by each of the local school districts. The expenditure shall be accounted for by the local district as a transportation expenditure paid to another education agency;

(c) The audited district expenditure shall be recognized by the State Superintendent of Public Instruction in computing the local district's entitlement under ORS 327.006;

(d) If the education service district reimburses the local district the difference between that portion billed and that paid under ORS 327.006, such reimbursement — if derived from property tax sources by education service district resolution — shall not be deducted by the state in determining the local district's approved costs. The local district shall account for the education service district reimbursement as other general receipts are accounted for from the education service district.

(10) For purposes of computing board and room entitlement for a district operating a dormitory under provisions of ORS 327.006, the state assumes responsibility for its proportionate share of costs associated with the provision of food, facilities, staff, operation, and maintenance necessary to provide students with safe and healthy living conditions. The state does not assume responsibility for costs associated with recreation or entertainment of students. The approved cost against which the computation is made for state liability shall not exceed the limit stated in ORS 332.405. In addition, the state will assume its proportionate share of the cost of field trips as defined in subsection (3)(c) of this rule.

(11) The computation of approved expenditures for board and room entitlement shall be made as follows:

(a) Salaries;

(b) Operation:

(A) Utilities;

(B) Supplies;

(C) Other Operational Costs.

(c) Maintenance:

(A) Upkeep;

(B) Replacement.

(d) Fixed Charges:

(A) Employee Benefits;

(B) Other Fixed Charges.

(e) Food;

(f) Operation of Buses and Other Vehicles — Supplies, Repairs and Maintenance;

(g) Depreciation:

(A) Dormitory;

(B) Buses and Other Vehicles.

(h) Total Expenditures (Sum of subsections (10)(a) through (g) of this rule);

(i) Deductions (subtract if cost is included in cost above):

(A) Payments Received from Other Districts and from Patrons;

(B) Nonreimbursable Transportation Costs as indicated in subsection (5)(m)(B) of this rule;

(C) State and Federal Receipts for Transportation, except those apportioned under ORS 327.006, 327.033, or third party Medicaid payments, if used to support expenditures in subsections (10)(a) through (g) of this rule;

(D) Federal School Lunch, Breakfast, and Milk Reimbursements;

(E) Sales of Food.

(j) Total Deductions (sum (10)(i)(A) + (i)(B) + (i)(C) + (i)(D) + (i)(E));

(k) Approved Cost ((10)(h) minus (10)(j) of this rule).

(12) The items included in the board and room entitlement computation are defined as follows:

(a) Salaries. Salaries and wages paid dormitory personnel, including the dormitory manager, cooks, custodians, and other personnel directly concerned with operation of the dormitory, and that portion of salaries paid secretarial and clerical assistants and other personnel attributable to the dormitory program;

(b) Operation:

(A) Utilities. Heat for buildings, water and sewage, electricity, telephone, and other utilities necessary for the operation of the dormitory;

(B) Supplies. Custodial supplies, supplies for care of grounds, linens, and other supplies necessary for the operation of the dormitory including food services. Purchase of food is included in subsection (11)(e) of this rule;

(C) Other Operational Costs. Contracted custodial services, window washing, laundry or linen services, etc., necessary for the operation of the dormitory.

(c) Maintenance:

(A) Upkeep. Expenditures associated with maintaining the existing dormitory facilities in a safe, healthy, and efficient condition, including supplies and materials for upkeep of dormitory grounds and the dormitory building. Costs associated with maintenance of recreational or entertainment facilities are excluded;

(B) Replacement of Equipment. Expenditures associated with replacing equipment necessary to the safe, healthy, and efficient operation of the dormitory. Replacement of equipment used for recreational or entertainment purposes are excluded.

(d) Fixed Charges:

(A) Employee Benefits. Expenditures for dormitory employees' benefits including social security and retirement, employee health insurance, workers' compensation, and unemployment insurance;

(B) Other Fixed Charges. Expenditures for property insurance, liability insurance, rental of land and buildings for purposes associated with operation of the dormitory, and other fixed charges directly attributable to operation of the dormitory.

(e) Food. Expenditures for food necessary for the operation of the dormitory;

(f) Operation of Buses and Other Vehicles — Supplies, Repairs, and Maintenance. Expenditures for fuel, oil, lubricants, tires, tire repair, batteries, vehicle repair parts and supplies, repair of vehicles by other than the school district, garage maintenance and operation, and garage equipment repair and maintenance necessary for the operation of buses utilized for purposes stated in section (3) of this rule and of other vehicles necessary for the operation of the dormitory;

(g) Depreciation:

(A) Dormitory. For purposes of computing dormitory depreciation, capitalized cost is defined as the unit cost of the asset (including the cost of original equipment), exclusive of interest, plus the cost of substantial improvements or remodeling. The purchase of land shall not be included. Costs associated with providing recreational or entertainment facilities are not included. Depreciation shall be computed at an annual rate of four percent;

(B) Buses and Other Vehicles. Depreciation for buses used for approved pupil transportation and that portion of other vehicles necessary for operation of the dormitory shall be computed in accordance with the formula and definition stated in paragraph (6)(k)(B) of this rule.

(h) Total. Sum of subsections (10)(a) through (g) of this rule;

(i) Deductions:

(A) Payments Received from Other Districts and from Patrons. Money received from other school districts, parents, guardians, or students for transportation or room and board if paid in support of expenditures listed in subsections (10)(a) through (f) of this rule;

(B) Nonreimbursable Transportation Costs. Costs for nonreimbursable transportation according to the formula and definition stated in paragraph (6)(l)(B) of this rule;

(C) State and Federal Receipts for Transportation. All state and federal receipts for transportation or room and board expenditures exclusive of funds apportioned under ORS 327.006 that have been included in subsections (10)(a) through (f) of this rule;

(D) Federal School Lunch, Breakfast, and Milk Reimbursements. All federal receipts for school lunch, breakfast, and milk expenditures that have been included in subsections (10)(a) through (f) of this rule;

(E) Sales of Food. Money received from teachers, students, or other individuals from food sales for which the expenditures are included in subsections (10)(a) through (f) of this rule.

(13) Beginning with the 2024-25 school year, school districts may request a waiver and/or supplemental plan to include Alternative Transportation as a reimbursable expense under their Transportation Grant. In order to include Alternative Transportation costs as a reimbursable expense, school districts must:

(a) Submit a proposed or revised supplemental plan and/or waiver for their district that includes explanations of the alternative transportation methods to be used.

(b) Demonstrate that the inclusion of Alternative Transportation will result in Transportation Grant expenses that are equal to or less than planned expenses without Alternative Transportation, or demonstrate that costs exceeding this amount will be paid from a source other than the transportation grant from the State School Fund.

(c) Document the local community engagement that was conducted to develop the plan for Alternative Transportation.

(d) For Alternative Transportation plans that include Public Transportation, districts must demonstrate that:

(A) No other transportation options, including Active Transportation options, are suitable and sufficient;

(B) They have made a good faith effort to recruit, hire, train, retain and pay transportation positions at competitive wages consistent with collective bargaining agreements and were unable to hire a sufficient workforce to ensure reliable service by a school bus and timely transport of students to and from school.

(e) School districts shall resubmit their supplemental plans and/or waivers for the inclusion of Alternative Transportation to be reauthorized by the State Board of Education every two years.

(f) Notwithstanding subsections (13)(a-e) of this section, a school district that, prior to the effective date of July 1, 2024, had been receiving reimbursement for costs incurred in providing transit passes under a supplemental plan or a waiver shall continue to receive reimbursement under the terms and conditions the school district was receiving reimbursement prior to the effective date of July 1, 2024 unless the State Board of Education and the school district agree otherwise.

(14) Approved Alternative Transportation costs shall include costs identified in or aligned with the plan presented in their request for a waiver and/or supplemental plan that has been approved by the State Board of Education.

(a) The Department may reimburse estimated Alternative Transportation costs during the school year the costs are incurred based on estimates provided by the school district, and then reconcile to actual costs the following school year.

(b) The Department shall not reimburse Alternative Transportation costs that exceed 5% of the school district's total Transportation Grant for the concurrent school year.

(15) Such items of expenditure as may be questionable in applying the policy stated in this administrative rule shall be resolved by the State Superintendent of Public Instruction and such determination shall be final.

(16) Apportionment of the State School Fund for 2001–02 and subsequent years.

Statutory/Other Authority: ORS 327.013 & ORS 820.100 - 820.120

Statutes/Other Implemented: ORS 327.013 & ORS 820.100 - 820.120

History:

[ODE 4-2024, amend filed 02/16/2024, effective 02/16/2024](#)

[ODE 51-2022, amend filed 10/26/2022, effective 10/26/2022](#)

[ODE 4-2021, amend filed 01/28/2021, effective 01/28/2021](#)

[ODE 38-2020, temporary amend filed 09/18/2020, effective 09/18/2020 through 03/16/2021](#)

[ODE 2-2020, amend filed 02/27/2020, effective 02/28/2020](#)

[ODE 4-2018, amend filed 02/21/2018, effective 02/21/2018](#)

ODE 46-2016, f. & cert. ef. 11-1-16

ODE 4-2016, f. & cert. ef. 2-5-16

ODE 39-2014, f. & cert. ef. 9-3-14

ODE 22-2011, f. & cert. ef. 12-15-11

ODE 6-2010, f. & cert. ef. 4-26-10

ODE 8-2008, f. & cert. ef. 3-21-08

ODE 10-2006, f. & cert. ef. 2-21-06

ODE 9-2003, f. & cert. ef. 6-13-03

ODE 25-2001, f. & cert. ef. 11-7-01

ODE 9-2000, f. & cert. ef. 4-5-00

EB 4-1997, f. & cert. ef. 4-25-97

EB 21-1993, f. & cert. ef. 6-2-93

EB 3-1992, f. & cert. ef. 2-21-92

EB 42-1988, f. & cert. ef. 11-15-88

EB 32-1987, f. & ef. 12-10-87

EB 4-1987, f. & ef. 2-20-87

1EB 5-1986, f. 1-30-86, ef. 2-1-86

1EB 1-1985, f. 1-4-85, ef. 1-7-85

1EB 17-1983, f. 11-23-83, ef. 11-25-83

1EB 15-1982, f. 8-4-82, ef. 8-5-82

1EB 4-1982, f. & ef. 2-10-82

1EB 6-1981, f. 3-2-81, ef. 3-3-81

1EB 10-1980, f. & ef. 5-5-80

1EB 4-1978, f. 1-27-78, ef. 1-27-78

1EB 233, f. 6-11-76, ef. 6-18-76

1EB 220, f. 2-17-76, ef. 3-15-76

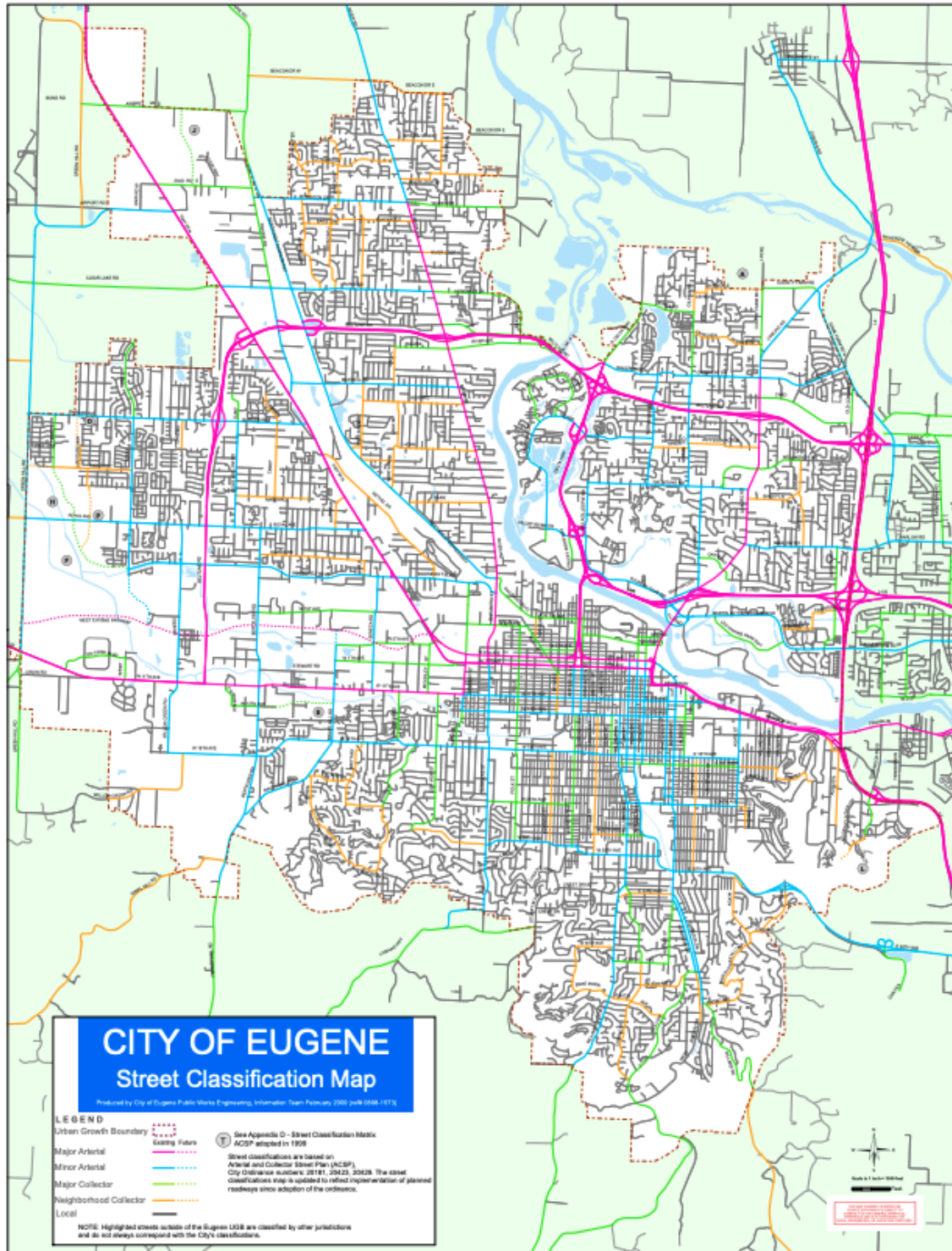
1EB 209, f. 12-5-75, ef. 1-16-76

1EB 181, f. 1-17-75, ef. 7-1-75

1EB 177, f. 10-2-74

Appendix C- Road Classification Map

Link: [City of Eugene: Road Classification Map](#)



Appendix D-2025 Supplemental Hazard Busing Evaluation

School	Region	Location of Hazard	Total Score	HAZARD?	HAZ Notes	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Adams	Churchill	Willamette St. between 19th & 25th	27	Yes	CURRENTLY A HAZARD (E of Will)	HAZARD	FALSE	0	7	10	1	5	0	2	0	2	Non-perpendicular intersections, heavy commercial use on Willamette	3 points removed for lights at 24th and 25th
Adams	Churchill	W 28th Ave - Chambers to Lincoln (Lorane for the curve)	29	Yes	Currently a HAZARD (S of 28th)	HAZARD	FALSE	0	10	10	1	5	0	2	0	1	Non-perpendicular intersections. Would like to see crossing at Adams, Taylor	
Adams	Churchill	W 28th Ave - Friendly to Jefferson	26	No	REMOVE PORTION OF ABOVE HAZARD	FALSE	FALSE	0	7	10	1	5	0	2	0	1	Non-perpendicular intersections. Would like to see crossing at Adams, Taylor	
Adams		18th- Willamette to Jefferson	28	Yes		HAZARD	FALSE	0	8	10	3	5	0	2	0	0		
Adams		Chambers (25th -27th)	26	No		FALSE	FALSE	0	10	3	5	5	0	2	0	1	Hill leads to increased	No crashes
ATA	Churchill	18th - Lincoln to Buck	27	No	Not CURRENTLY A HAZARD, (N of 18th)	HAZARD	FALSE	0	5	10	3	5	0	2	0	2	High traffic volume, heavy commercial use	
ATA	Churchill	7th - Chambers to Van Buren	32	Yes	NEW HAZ	HAZARD	HAZARD	0	5	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
ATA	Churchill	6th - Tyler to Taylor	32	Yes	NEW HAZ	HAZARD	HAZARD	0	5	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
ATA	Churchill	Chambers south of Lorane, Lorane west of Chambers, Crest adjacent to Lorane	33	Yes	NEW HAZ	HAZARD	HAZARD	15	5	0	5	0	3	1	3	1	Curves	Scored with lowest value for each of the three roads (Ex: Chambers is local road, Lorane is minor arterial and Crest is major collector)
Awbrey Park	North	Spring Creek Dr.	17	No	Not currently a HAZ	FALSE	FALSE	8	5	0	0	2	0	1	0	1	Long, straight stretch with no breaks encourages speeding	
Awbrey Park	North	River Rd - Blackfoot Ave- Beacon Dr W	35	Yes	Currently a HAZ (W of Riv Rd)	HAZARD	HAZARD	0	7	10	7	7	0	4	0	0		
Awbrey Park	North	Beacon Dr - River Road to Futura	34	Yes	Currently a HAZ (N of Beacon)	HAZARD	HAZARD	15	5	0	5	2	0	1	3	3	Curves/terrain, secluded, Other: comes off a high speed road	
Awbrey Park	North	Beacon Dr - Futura to Scenic	26	No	No longer a HAZ	FALSE	FALSE	9	5	1	5	2	0	1	0	3	Curves/terrain, secluded, Other:	
Awbrey Park/Madison	North	Beacon Dr - Scenic to South of Hileman	37	Yes	Currently a HAZ (E of Scenic)	HAZARD	HAZARD	15	5	0	7	2	0	1	3	4	Curves/terrain, secluded, Other: comes off a high speed road, and zero visibility	
Awbrey Park	North	Beacon Dr - South of Hileman to Riv Lp 1	30	Yes	Currently a HAZ (N of Beacon)	HAZARD	FALSE	10	5	0	7	2	0	1	3	2	secluded, Other: comes off a high speed road,	
Awbrey Park	North	River Lp #2	28	Yes	Currently a HAZ (S of Riv Lp 2)	HAZARD	FALSE	10	5	0	5	2	0	1	3	2	Secluded, Other: long, straight road with no interruption encourages speeding	No lighting at Banner, Kendall, Kirsten

School	Region	Location of Hazard	Total Score	HAZARD?	HAZ Notes	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Camas	South	30th	25	No		FALSE	FALSE	0	2	10	5	5	0	3	0	0		
Camas Ridge	South	24th between Amazon Pkwy and Hilyard St	20	No	No longer a HAZ	FALSE	FALSE	0	1	10	3	5	0	1	0	0		
Camas Ridge, Edgewood	South	East Amazon Dr	20	No	No longer a HAZ	FALSE	FALSE	0	10	0	3	5	0	1	0	1	Unmarked crosswalks across minor arterials in the walk area	Sidewalk on one side with bark walking path on other
Camas Ridge, Edgewood	South	West Amazon Dr	19	No	No longer a HAZ	FALSE	FALSE	0	8	0	3	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Camas Ridge, Roosevelt	South	Hilyard St between 28th and 33rd	24	No	No longer a HAZ	FALSE	FALSE	0	4	10	1	5	0	3	0	1	Unmarked crosswalks across minor arterials in the walk area	3 points removed for traffic light. COE is working to reduce speed limit
Chavez	Churchill	Polk - 6th to 18th	23			FALSE	FALSE	0	5	10	3	3	0	2	0	0		
Chavez	Churchill	W 11th Ave between City View and Jefferson St	28	Yes	Currently a HAZ (N of 11th)	HAZARD	FALSE	0	7	10	3	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Chavez	Churchill	W 13th Ave - Arthur to Madison	26	No	Not currently a HAZ	FALSE	FALSE	0	7	10	3	5	0	1	0	0		
Chavez	Churchill	7th - Chambers to Van Buren	34	Yes	Currently a HAZ (N of 7th)	HAZARD	HAZARD	0	7	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
Chavez	Churchill	6th - Tyler to Taylor	34	Yes	Currently a HAZ (N of 7th)	HAZARD	HAZARD	0	7	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
Chavez	Churchill	18th - Chambers to Hawkins	30	Yes	NEW HAZ	HAZARD	FALSE	0	8	10	3	5	0	2	0	2	High traffic volume, heavy commercial use at Chambers	
Chavez, ATA	Churchill	Chambers St - 18th-11th	27	Yes	Currently a Hazard	HAZARD	FALSE	0	5	10	3	5	0	2	0	2	Unmarked crosswalks across minor arterials in the walk area, personal safety issues on the Fern Ridge/Chambers pedestrian underpass	3points removed from crossing score because of traffic signal in front of school. Crossings are a little closer than every quarter mile and it's an arterial = 8 pts, with 3 points off for the traffic signal controlled crossing in front of school
Chavez, ATA	Churchill	Chambers St - 18th-25th	29	Yes	No Longer a HAZ (W of Chambers)	HAZARD	FALSE	0	7	7	3	5	0	6	0	1	Unmarked crosswalks across minor arterials in the walk area	3points removed from crossing score because of traffic signal controlled crossings


School	Region	Location of Hazard	Total Score	HAZARD?	HAZ Notes	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Edgewood	South	Willamette St - 37th to Spencer's Crest	31	Yes	NEW HAZ	HAZARD	FALSE	1	7	7	7	5	0	1	3	0		Crash data is accounting for 2 blocks in either direction, assuming that students will cross at the light
Edgewood	South	Fox Hollow crossing safety	15	No	Not currently a HAZ	FALSE	FALSE	1	5	1	1	3	0	1	0	3	Curves, high speed because of hill, shoulder used by bikes so not very useable for walking	Speed limit just lowered to 25
Edgewood / Camas Ridge	South	East Amazon Dr	20	No	No Longer a HAZ	FALSE	FALSE	0	10	0	3	5	0	1	0	1	Unmarked crosswalks across minor arterials in the walk area	Sidewalk on one side with bark walking path on other
Edgewood / Camas Ridge	South	West Amazon Dr	19	No	No Longer a HAZ	FALSE	FALSE	0	8	0	3	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Edgewood	South	Snell crossing of E/W Amazon	27	No	No Longer a HAZ	HAZARD	FALSE	10	5	0	0	0	0	0	0	12	Crosses open waterway with insufficient protection	
Spencer Butte	South	Willamette Southwest of 46th to past 52nd	41	No		HAZARD	HAZARD	1	10	10	7	5	3	1	3	1	curves and hills	
Spencer Butte	South	Fox Hollow past Woodleaf to Owl/West Amazon	33	No		HAZARD	HAZARD	15	5	1	1	3	3	1	3	1	curves and hills	
Spencer Butte	South	Dillard Road just south of Snell	36	No		HAZARD	HAZARD	15	5	0	5	3	3	1	3	1	curves and hills	Not many intersections, but Old Dillard/Dillard intersection is dangerous
Spencer Butte	South	North Shasta Loop (off of East 43rd to the north to Shasta View)	32	No		HAZARD	HAZARD	15	5	0	1	2	3	0	3	3	Steep grade, curves, roadway floods and there are no sidewalks to escape to	
Edison, Roosevelt	South	Hilyard st (15th-20th)	28	Yes	Currently a HAZ (W of Hilyard)	HAZARD	FALSE	0	8	10	1	5	0	2	0	2	Unmarked crosswalks across minor arterials in the walk area	COE is working on reducing speed limit. Not removing points for traffic lights because of high number of turning motions
Edison, Roosevelt	South	Hilyard st (20th-23nd)	20	No	No Longer a HAZ	FALSE	FALSE	0	10	0	1	5	0	2	0	2	Unmarked crosswalks across minor arterials in the walk area	
Edison	South	Franklin Blvd - 11th-Agate	33	Yes	New HAZ	HAZARD	HAZARD	0	2	10	5	7	0	6	0	3	Very high volume of all modes of traffic, part of highway system, bus line down middle of road	

School	Region	Location of Hazard	Total Score	HAZARD?	HAZ Notes	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Gilham	Sheldon	Gilham Rd Creekside Way-Ayres Rd	25	No	No Longer a HAZ	FALSE	FALSE	10	5	1	3	2	0	1	3	0		
Gilham	Sheldon	Ayers and Gilham intersection, crossing Ayers	17	No		FALSE	FALSE	1	5	1	3	3	0	1	3	0		
Gilham, Cal Young	Sheldon	Green Acres Rd - (N Delta Rd to Norkenzie Rd)	30	No	NOT IN WALK ZONE, HAZ not needed	HAZARD	FALSE	0	7	10	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	This will be lowered soon, hopefully.
Gilham, Cal Young	Sheldon	Crescent Ave (Norkenzie to Coburg)	27	Yes	Currently a HAZ (S of Crescent)	HAZARD	FALSE	0	8	10	1	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Gilham, Cal Young	Sheldon	Coburg Rd - Beltline and north	31	Yes	Currently a HAZ (E of Coburg)	HAZARD	FALSE	0	10	1	5	7	0	6	0	2	Unmarked crosswalks across minor arterials in the walk area, bend in the road	Not dropping score because of traffic lights because of high # of turning motions.
Gilham	Sheldon	County Farm - Coburg to Wildish/County Farm	27	Yes		HAZARD	FALSE	8	5	0	5	3	0	1	3	2	Uninterrupted straightaway leads to higher speeds, industrial use (Wildish)	Could have 10 points for Street Safety for sections just north and south of Dale because of ditches on sides of road
Holt, Monroe	Sheldon	Arcadia	19	No	Not currently a HAZ	FALSE	FALSE	10	5	1	0	0	0	0	3	0		
Holt, Monroe	Sheldon	Harlow	28	Yes	New HAZ	HAZARD	FALSE	0	5	10	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	3 points off crossing safety because of traffic light in front of school
Holt, Monroe	Sheldon	Willakenzie between Coburg and curve in Willakenzie	22	No	New HAZ	FALSE	FALSE	0	5	10	1	3	0	2	0	1	Very high volume	
Howard, Kelly, YG	North	Howard Ave	25	No	Not currently a HAZ	FALSE	FALSE	8	5	7	1	2	0	1	0	1	Cars, trash cans and other obstacles on shoulder of road	
Howard, River Road, Kelly	North	Horn at Maclay to River Road	20	No	Not currently a HAZ	FALSE	FALSE	9	5	0	1	2	0	1	0	2	Long straight stretch, trash cans on shoulder	Around the curve, the inside shoulder often disappears under debris.
Howard, River Road, Kelly	North	Northpark from Cornwall to NW Expressway	22	No	Not currently a HAZ	FALSE	FALSE	9	5	1	1	2	0	1	0	3	Long straight stretch, trash cans on shoulder, comes off NW Expressway	Stretches where shoulder disappears.
Howard, YG	North	Maxwell Rd	30	Yes	Currently a HAZ (N of Maxwell)	HAZARD	FALSE	0	7	10	5	5	0	2	0	1	Long straight stretches encourage speeding	
Howard	North	River Road	37	Yes	Currently a HAZ	HAZARD	HAZARD	0	7	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	
Kelly	North	Maxwell Rd	28	No		HAZARD	FALSE	0	5	10	5	5	0	2	0	1	Long straight stretches encourage speeding	
Kelly	North	River Road	35	Yes	Currently a HAZ	HAZARD	HAZARD	0	5	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	

School	Region	Location of Hazard	Total Score	HAZARD?	HAZ Notes	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Kelly, River Road, Howard	North	Horn at curve between Rosy to Oak	25	No		FALSE	FALSE	10	5	0	1	2	0	1	3	3	Curves, long straight stretches encourage speeding, shrubs on southeast side of curve and northwest side of Horn/Lake intersection significantly impact visibility	
Kennedy	Churchill	Bertleson - Bailey Hill to 18th	34	Yes		HAZARD	HAZARD	10	10	1	7	5	0	1	0	0		
Kennedy	Churchill	Bertleson - 18th to 11th.	38	No		HAZARD	HAZARD	8	10	3	7	5	0	2	3	0		No lighting at Churchill Meadows
Kennedy	Churchill	Bailey Hill - Bertleson to Kennedy	23	No		FALSE	FALSE	1	10	0	3	5	0	1	3	0		
Kennedy, Twin Oaks	Churchill	Bailey Hill- Bertleson to Klouts	33	Yes		HAZARD	HAZARD	6	10	1	7	5	0	1	3	0		
Kennedy	Churchill	W 11th Ave - Bailey to Beltline	33	Yes	x	HAZARD	HAZARD	0	3	10	5	7	0	6	0	2	High traffic volume, heavy commercial use	
Kennedy	Churchill	Warren - Summit Terrace north to northern part of Timberline Dr	17	No		FALSE	FALSE	10	0	0	0	2	0	0	3	2	Curves/terrain, steep grade	
Kennedy	Churchill	W 18th Ave - Bertleson to Bailey Hill	29	No		HAZARD	FALSE	0	10	7	3	5	0	4	0	0		
Kennedy	Churchill	W 18th Ave - Bailey Hill to Buck Street	27	No		HAZARD	FALSE	0	5	10	3	5	0	4	0	0		Crossing at light at Brittany brings down crossing score
Kennedy	Churchill	Buck and 17th	16	No		FALSE	FALSE	9	5	1	0	0	0	0	0	1	Offset intersection	Crash at Buck and 14th
Madison	North	River Rd - Irvington to past Lynnbrook	34	Yes		HAZARD	HAZARD	0	5	10	7	7	0	4	0	1		
Madison	North	River Lp #1 - River Road to Alameda (south)	28	No		HAZARD	FALSE	9	5	1	5	2	0	1	3	2	Curves/terrain, secluded	
Madison	North	River Loop 1/Wilkes Alameda to Beacon (North/east)	28	No		HAZARD	FALSE	10	5	0	7	0	0	1	3	2	Long straight stretches encourage speeding; curves/terrain	
Madison	North	Wilkes between Madison and River Road	29	No		HAZARD	FALSE	4	5	10	5	3	0	1	0	1	Long straight stretch with no stop signs or signals encourage speeding	
Madison	North	Hunsaker	29	No		HAZARD	FALSE	8	5	7	1	3	0	1	0	4	Heavy Commercial, Delinators keep getting hit indicating crash risk, Coming off highway at high speeds, obstacles in shoulder	
Madison	North	Beacon east of Scenic	32	No		HAZARD	HAZARD	15	5	0	5	0	0	1	3	3	Blind curve, speed limit increases just past walk zone, country road feel encourages speeding	

School	Region	Location of Hazard	Total Score	HAZARD?	HAZ Notes	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
McCornack	Churchill	Bailey Hill Rd north of 18th	32	Yes		HAZARD	HAZARD	0	10	10	5	5	0	2	0	0		Not taking off points because of lots of turning motions at 18th and Bailey Hill - it's a high crash intersection.
McCornack	Churchill	W 18th Ave - Josh St to City View	32	YES		HAZARD	HAZARD	0	10	10	3	5	0	4	0	0		
Monroe	Sheldon	Coburg Rd - south of Beltline	30	No		HAZARD	FALSE	0	2	10	5	7	0	6	0	0		
Monroe	Sheldon	Harlow	26	No		FALSE	FALSE	0	3	10	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	3 points off crossing safety because of traffic light in front of school
Monroe	Sheldon	Oakway Rd	31	No		HAZARD	FALSE	0	7	7	5	5	0	5	0	2	Non-perpendicular intersections, lots of commercial activity near Coburg	
Monroe, Gilham	Sheldon	Gilham Rd south of Beltline	25	No		FALSE	FALSE	0	8	1	5	5	0	2	3	1	Unmarked crosswalks across minor arterials in the walk area	Generally good lighting, but none at Sally
Monroe, Gilham	Sheldon	Gilham Rd north of Beltline to Crescent	25	No		FALSE	FALSE	0	8	1	5	5	0	2	3	1	Unmarked crosswalks across minor arterials in the walk area	Lighting could be poor at striped crossing in front of school
Monroe, Holt	Sheldon	Willakenzie Rd - east of	25	No		FALSE	FALSE	0	5	10	3	3	0	4	0	0		
River Road/El Camino	North	River Road	37	Yes		HAZARD	HAZARD	0	7	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	
Roosevelt	South	Amazon Parkway	24	No		FALSE	FALSE	0	10	3	5	5	0	1	0	0		
Sheldon	Sheldon	Beltline Rd from Game Farm Rd to Gateway Dr	33			HAZARD	HAZARD	0	5	10	7	5	0	4	0	2	Significant traffic due to shopping mall and freeway exit. Significant speeds due to freeway exit.	
Spring Creek, Madison	North	Irving	34	Yes		HAZARD	HAZARD	0	10	10	5	5	0	2	0	2	Long straight stretch with no stop signs or signals encourage speeding, comes off NW Expressway with people travelling high speeds	Not removing points because there's only 1 light.
Spring Creek, Madison	North	River Road	37	Yes	Current hazard as well	HAZARD	HAZARD	0	7	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	
Spring Creek, Madison	North	Irvington	25	No		FALSE	FALSE	0	10	3	5	5	0	1	0	1	Long, straight stretches encourage speeding	

School	Region	Location of Hazard	Total Score	HAZARD?	HAZ Notes	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Twin Oaks	Churchill	Spencer Creek Rd/Lorane Hwy	35	Yes	currently a HAZ	HAZARD	HAZARD	8	5	3	7	3	3	1	3	2	It's a highway. Rural, very high speed road.	
Twin Oaks	Churchill	Bailey Hill Rd	32	Yes	currently a HAZ	HAZARD	HAZARD	8	5	0	7	3	3	1	3	2	Very high speed, little expectation of people walking or biking	
WillaG	Sheldon	Willagillespie	24	No		FALSE	FALSE	0	2	10	5	5	0	2	0	0		
Cal Young	Sheldon	Norkenzie from Green Acres to Beltline	30	No		HAZARD	FALSE	0	10	7	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Cal Young	Sheldon	Cal Young from Norkenzie to Debrick	17	No		FALSE	FALSE	0	5	0	5	5	0	2	0	0		
Willagillespie	Sheldon	Cal Young from Willagillespie to Norkenzie	19	No		FALSE	FALSE	0	7	0	5	5	0	2	0	0		
Willagillespie	Sheldon	Goodpasture from Delta Highway to Norkenzie	25	No		FALSE	FALSE	1	10	0	5	5	0	1	3	0		



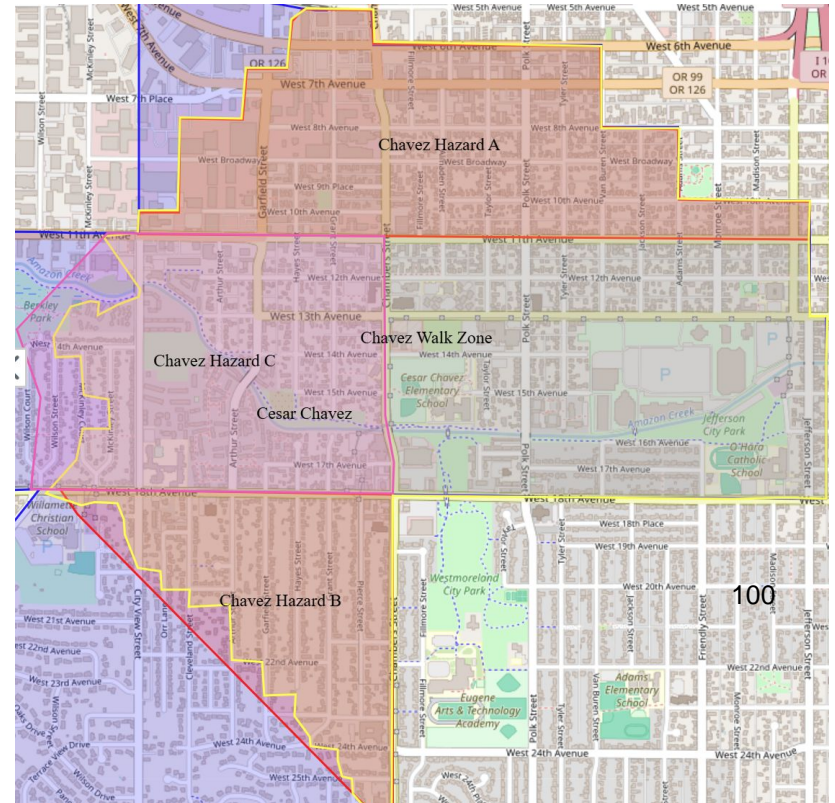
2025 Supplemental Busing Plan Update

Arthur Hart, Director of Transportation

What is the Supplemental Busing Plan?

- Walk Zone*
 - 1 mile from elementary
 - 1.5 miles from secondary
- Supplemental Busing Plan documents where students are bused in the Walk Zone due to “Hazards” or other considerations.
- Allows for transportation reimbursement from the state

* A distance from a school where a student is not required by the state to be transported, except by supplemental plan. See ORS 327.043



Why The 2025 Update?

Eugene School District 4J migrated our school bus routing to a new system in the summer of 2024.

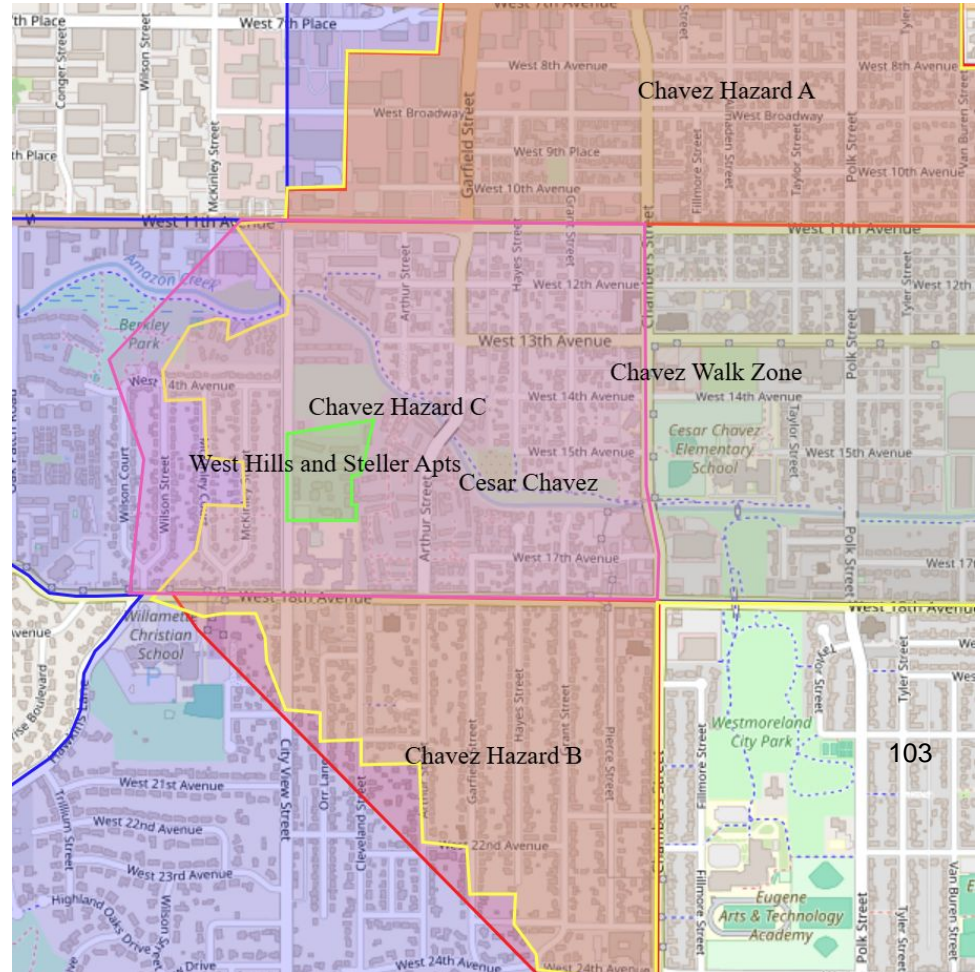
- Higher definition maps available in the new system created an opportunity to better communicate hazard areas in an updated supplemental plan.
- When we migrated to the new routing software we discovered that the older routing software had incorrectly calculated walk zones. Walk zones were corrected and this necessitated a review of hazardous areas.
 - Spencer Butte has four new hazards that need to be reported.
 - Edgewood has one new hazard that needs to be reported.
 - ATA has one new hazard that needs to be reported.
 - Awbrey Park has an adjusted hazard that needs to be reported.
 - Madison has one new hazard that needs to be reported.
 - Spring Creek has one new hazard that needs to be reported.
- In the 2024 supplemental plan the 2024 McCornack hazard should have have been divided into two hazards to properly identify the area served by a crossing guard. This has been corrected.

What Was The Process

- Guiding values are equitable outcomes, student safety and attendance. Using the same criteria from the 2024 Supplemental Plan, as walk boundaries were adjusted new areas were evaluated for potential hazards.
- Use of objective criteria:
 - Crossing safety
 - Crash history
 - Speed limit
 - Street classification
 - Road width
 - Lighting
 - Delay in emergency response
 - Other conditions

What Types of Changes Are Being Made To General Transportation Eligibility?

- Minor walk boundary adjustments
- New hazards declared
- Some old hazards adjusted
- Addition of an Attendance Informed Equity Transportation Program
- Addition of a Safety Informed Temporary Transport Program



Equity Informed Temporary Transport Program Pilot

- Initiated in the 2024 Supplemental Plan
- Provides temporary busing with Education and Transportation Directors' approval to assure school access when access barriers exist that involve equity concerns.
- Provides appropriate supports, while busing, to ameliorate barriers to attendance and encourage family transport resiliency.
- This school year the Equity Informed Temporary Transport Program has provided temporary Transportation assistance to six students while access challenges were mitigated.

Pilot of Safety Informed Temporary Transport Program

- Provides temporary busing with Safety and Transportation Directors' approval to assure school access when temporary factors create unsafe walking paths for students without alternate safe routes that meet state self-transport distances
- Safety factors considered may include temporary environmental hazards, major construction projects, known location of drug dealing or production, legal residence of a¹⁰⁵ sex offender, or violent crime.

Attendance Informed Equity Transportation Program

- Provides transportation eligibility for elementary students living in certain low-income housing complexes based on attendance concerns.
- The rationale for this proposal is that there is an identifiable link between attendance rates and academic outcomes, and consistent access is an issue for certain housing complexes. Transportation eligibility would remove an access barrier and support higher attendance.

Questions?

Questions

Arthur Hart
Director of Transportation
Transportation
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(541) 790-7474



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

05/07/2025

Title

Tyler Technologies School ERP (Enterprise Resource Planning) Pro Contract, Statement of Work, and Projected Timeline

Presenter: Matt Brown, Director of Finance

Items Included:

- Software Service Agreement

Background

The Eugene School District is requesting approval to move on a new ERP system to replace PowerSchool/BusinessPlus.

Staff and leadership have met over the last several months to discuss ongoing issues and opportunities with the system along with exploring what options are available and used in other school districts.

Background on PowerSchool BusinessPlus

The district began implementation in 2019. A “completed” system occurred in 2024, however there still are a number of outstanding issues both caused by internal processes and limitations of the software in its current state. During implementation, COVID occurs which caused delays and staff turnover both at the district and at PowerSchool. Multiple implementation managers assisted the district, each bringing a unique and different experience/process to the implementation. Eugene 4J was the first district in the nation to use a new version of BusinessPlus, which in my opinion/experience, not ready for use or tested enough. During implementation, there were several internal causes for failure which involves an overcomplicated internal process among Financial Services, Human Resources, and other departments/staff that work within the software. Eugene 4J did not acclimate its processes to the new system and attempted to make BusinessPlus work within our internal processes, which caused additional issues and errors in implementation and items still yet to be corrected. Overall, during implementation, many decisions were made within silos and testing on more integral systems did not occur at the level they should have, which resulted in issues that we have been corrected for the past two years to get to a stable environment as best as possible.

Ongoing Concerns with PowerSchool BusinessPlus

Modules for Position Budgeting and Position Control will not work in our current setup and internal processes. The system also does not track vacancies. Even though our contract with BusinessPlus provides a dedicated support person for faster response time to issues, overall, across Financial Services and Human Resources, we both agree that the system was not built effectively or properly to continue use. For employees, BusinessPlus is difficult to learn and teach directors and staff to operate for even simple tasks of entering an invoice or checking budgets throughout the year. The initial setup decisions of the system, are unable to be corrected without breaking down the entire system and building up again from scratch. In light of this potential option, staff felt the need to look at other options available.

Tyler Technologies School ERP Pro

Tyler Technologies is a well-known and vetted product throughout the United States and used heavily with school district in Oregon. Out of the 197 school districts in the state, 159 choose to work with Tyler Technologies. The company also has an additional 29 customers with Charters, Educational Services Districts, and Private Schools.

Multiple staff members from Financial Services, Human Resources, and other departments took part of on-site demonstrations and also visited several school districts that use the system. Additional vetting was done with districts outside of the state that would have a similar transition process from BusinessPlus.

There are a number of systems/practices within School ERP Pro that we would like to take advantage to not only increase efficiency but also reduce manual entry errors. Some of these items involve integrated job postings that automatically transfer employee information when hired, to common dashboards for departments to review budgets and staffing on an ongoing basis, and electronic employee actions for such things as account/position changes.

With such a high user-base within Oregon, a number of local and regional training groups are available along with ongoing support groups with neighboring school district like Bethel and Springfield that both utilize this product. This equates to additional support for best practices/policies and assistance when we run into issues along with having Oregon-specific reporting already created and tested from multiple school districts who report to agencies like ODE and PERS. Not to mention the potential for hiring staff in the future that already has experience working with this financial product.

Overall Cost Differences & Ongoing Costs

For BusinessPlus, the annual cost to operate this product in addition to other products used in conjunction with BusinessPlus is approx. \$395,000 per year on an ongoing basis.

For Tyler Technologies, the annual cost to operate this product in addition to a more limited list of products that would be used is approx. \$285,000 per year on an ongoing basis.

The estimated cost of implementation for this product is estimated at \$275,000. The district has also identified the desire to hire a temporary project manager for this transition with an estimated cost of \$85,000 and a potential need for staffing support (hiring temp staff to assist when employees need to focus on implementation) with an estimated cost of \$40,000. The total estimated cost of implementation is \$400,000. Funding for the implementation has been identified in the Capital Reserve fund.

Implementation Timeline

The implantation timeline for this product is typically 6-12 months, however with the information that we are aware of and data coming from BusinessPlus, I am recommending a project timeline of 18 months to ensure adequate time for staff to internally review and clean up data before it goes into the new system. In addition to ensuring clean data, additional time will need to be dedicated to discuss processes surrounding Financial Services and Human Resources along with district-wide processes that may need to update to ensure a smoother transition to School ERP Pro and to align our processes with the system best practices.

Start: July 2025

Go-Live: January 2027

There are additional products/modules that may be added to a second phase of implementation; however, they are currently working moderately well within our current environment and can be transferred/used with School ERP Pro during the initial implementation. We will not be looking at these potential changes until after a successful go-live and overall product review at that time. These products include Absence Management, Substitute Management, AI-Integration, Timeclock management, and others potential opportunities to be reviewed at a later date.

Procurement Process

Per Board Policy DJC-AR ("Special Procurements and Exemptions from Competitive Bidding") I.B.14 and ORS 279A.215, the district may purchase goods or services under a contract or procurement solicited by a nonprofit procurement organization of which it is a member so long as the procurement complies with the requirements for permissive, joint, or interstate cooperative procurements as applicable. For the attached Tyler Technologies contract, the district has utilized an active permissive cooperative agreement (Sourcewell #090320-TTI) to satisfy both district and state of Oregon solicitation regulations. Eugene School District 4J is a Sourcewell member in good standing and is eligible to piggyback off Sourcewell #090320-TTI per the Daily Journal of Commerce's Affidavit of Publication, dated April 19, 2024.



SOFTWARE AS A SERVICE AGREEMENT

This Software as a Service Agreement is made between Tyler Technologies, Inc. and Client.

WHEREAS, Client selected Tyler to provide certain products and services set forth in the Investment Summary, including providing Client with access to Tyler's proprietary software products, and Tyler desires to provide such products and services under the terms of this Agreement;

WHEREAS, Client is a member of Sourcewell (formerly known as National Joint Powers Alliance) ("Sourcewell") under member number 11916;

WHEREAS, Tyler participated in the competitive bid process in response to Sourcewell RFP #060624 by submitting a proposal, on which Sourcewell awarded Tyler a Sourcewell contract, numbered 060624-TTI (hereinafter, the "Sourcewell Contract");

WHEREAS, documentation of the Sourcewell competitive bid process, as well as Tyler's contract with and pricing information for Sourcewell is available at <https://www.sourcewell-mn.gov/cooperative-purchasing/060624-TTI>; and

WHEREAS, Client desires to purchase off the Sourcewell Contract to procure certain software functionality indicated in the Investment Summary from Tyler, which Tyler agrees to deliver pursuant to the Sourcewell Contract and under the terms and conditions set forth below.

NOW THEREFORE, in consideration of the foregoing and of the mutual covenants and promises set forth in this Agreement, Tyler and Client agree as follows:

SECTION A – DEFINITIONS

- **"Agreement"** means this Software as a Service Agreement.
- **"Business Travel Policy"** means our business travel policy. Our current Business Travel Policy is available here: <https://www.tylertech.com/portals/0/terms/Tyler-Business-Travel-Policy.pdf>.
- **"Client" or "District" or "District 4J"** means the party indicated on the signature block or, in the absence of a signature block, the Investment Summary.
- **"Data"** means your data necessary to use the Tyler Software.
- **"Data Storage Capacity"** means the contracted amount of storage capacity for your Data, if any, identified in the Investment Summary.
- **"Defect"** means a failure of the Tyler Software to substantially conform to the functional descriptions set forth in our written proposal to you (or the Documentation in the absence of a written proposal), or their functional equivalent. Future functionality may be updated, modified, or otherwise enhanced through our maintenance and support services, and the governing functional descriptions for such future functionality will be set forth in our then-current Documentation.

- **“Defined Users”** means the number of users, if any, that are identified in the Investment Summary. If Exhibit A contains Enterprise Permitting & Licensing labeled software, defined users mean the maximum number of named users that are authorized to use the Enterprise Permitting & Licensing labeled modules as indicated in the Investment Summary.
- **“Developer”** means a third party who owns the intellectual property rights to a Third-Party Product.
- **“Documentation”** means any online or written documentation related to the use or functionality of the Tyler Software that we provide or otherwise make available to you, including instructions, user guides, manuals and other training or self-help documentation.
- **“Effective Date”** means the date by which both your and our authorized representatives have signed the Agreement. Notwithstanding the foregoing, if these terms are linked from an Order Form, the Effective Date is the date your authorized representative signed the Order Form.
- **“Force Majeure”** means an event beyond the reasonable control of you or us, including, without limitation, governmental action, war, riot or civil commotion, fire, natural disaster, or any other cause that could not with reasonable diligence be foreseen or prevented by you or us.
- **“Investment Summary”** means the agreed upon cost proposal for the products and services attached as Exhibit A.
- **“Order Form”** means an ordering document that includes a quote or investment summary and specifies the items to be provided by Tyler to Client, including any addenda and supplements thereto.
- **“Professional Services”** means those services provided by Tyler or a third party related to the scope of this Agreement and identified in the Investment Summary.
- **“SaaS Fees”** means the fees for the SaaS Services identified in the Investment Summary.
- **“SaaS Services”** means software as a service consisting of system administration, system management, and system monitoring activities that Tyler performs for the Tyler Software and includes the right to access and use the Tyler Software, receive maintenance and support on the Tyler Software, including Downtime resolution under the terms of the SLA, and Data storage and archiving. SaaS Services do not include support of an operating system or hardware, support outside of our normal business hours, or training, consulting, or other professional services.
- **“SLA”** means the service level agreement. A copy of our current SLA is attached hereto as Exhibit C.
- **“Statement of Work”** means the industry standard implementation plan describing how our professional services will be provided to implement the Tyler Software and outlining your and our roles and responsibilities in connection with that implementation. The Statement of Work is attached as Exhibit E.
- **“Support Call Process”** means the support call process applicable to all our customers who have a right to use the Tyler Software. Our current Support Call Process is available here: <https://www.tylertech.com/portals/0/terms/Tyler-Support-Call-Process.pdf>.
- **“Third-Party Hardware”** means the third-party hardware, if any, identified in the Investment Summary.
- **“Third-Party Products”** means the Third-Party Software and Third-Party Hardware.
- **“Third-Party SaaS Services”** means software as a service provided by a third party, if any, identified in the Investment Summary.
- **“Third-Party Services”** means the third-party services, if any, identified in the Investment Summary.
- **“Third-Party Software”** means the third-party software, if any, identified in the Investment Summary or included with the Tyler Software.

- **“Third-Party Terms”** means the end user license agreement(s) or other terms, if any, for the Third-Party Products or other parties’ products or services, as applicable, and attached or indicated at Exhibit D.
- **“Tyler” or “Contractor”** means Tyler Technologies, Inc., a Delaware corporation.
- **“Tyler Software”** means our proprietary software, including any integrations, custom modifications, and/or other related interfaces identified in the Investment Summary and licensed by us to you through this Agreement.
- **“we,” “us,” “our”** and similar terms mean Tyler.
- **“you”** and similar terms mean Client.

SECTION B – SAAS SERVICES

1. **Rights Granted.** We grant to you the non-exclusive, non-assignable limited right to use the SaaS Services solely for your governmental purposes, subject to any limits for Defined Users or Data Storage Capacity. You may add additional users or additional data storage capacity on the terms set forth in this Agreement. In the event you regularly and/or meaningfully exceed the Defined Users or Data Storage Capacity, we reserve the right to charge you additional fees commensurate with the overage(s). You acknowledge that we have no obligation to ship copies of the Tyler Software as part of the SaaS Services. Your right to use the SaaS Services applies to releases provided as part of our Maintenance and Support Services as further detailed in this Agreement.
2. **Ownership.**
 - 2.1. We retain all ownership and intellectual property rights to the SaaS Services, the Tyler Software, and anything developed by us under this Agreement. You do not acquire under this Agreement any license to use the Tyler Software in excess of the scope and/or duration of the SaaS Services.
 - 2.2. The Documentation is licensed to you and may be used and copied by your employees for internal, non-commercial reference purposes only.
3. **Data.**
 - 3.1. You retain all ownership and intellectual property rights to the Data. You expressly recognize that except to the extent necessary to fulfill our obligations contained in this Agreement, we do not create or endorse any Data used in connection with the SaaS Services.
 - 3.2. You expressly grant to us a limited, non-exclusive license to access, copy, transmit, download, display, and reproduce your Data to provide services pursuant to this Agreement. Additionally, you agree that Tyler may use deidentified Data for Client or third-party demonstrative or training purposes.
 - 3.3. Our access to and use of your Data necessary to use the Tyler Software or SaaS Services will comply with applicable provisions of our Privacy Statement (available at <https://www.tylertech.com/privacy>) and applicable law.
 - 3.4. Data Breach Notification. Tyler will provide notice of a breach of Client Data in accordance with applicable state and federal data breach notification laws.
4. **Restrictions.**
 - 4.1. You may not:
 - 4.1.1. make the Tyler Software or Documentation resulting from the SaaS Services available in any manner to any third party for use in the third party’s business operations;

- 4.1.2. modify, make derivative works of, disassemble, reverse compile, or reverse engineer any part of the SaaS Services;
 - 4.1.3. access or use the SaaS Services to build or support, and/or assist a third party in building or supporting, products or services competitive to us; or
 - 4.1.4. license, sell, rent, lease, transfer, assign, distribute, display, host, outsource, disclose, permit timesharing or service bureau use, or otherwise commercially exploit or make the SaaS Services, Tyler Software, or Documentation available to any third party other than as expressly permitted by this Agreement.
 - 4.1.5. Notwithstanding anything to the contrary in this Section 4.1, you may disclose, with our written consent, not to be unreasonably withheld, the Tyler Software, SaaS Services, or Documentation to a third party you consult with regarding the implementation or use of the Tyler Software and SaaS Services. You must ensure that any such third-party's use is subject to the terms of this Agreement, and you acknowledge and agree that you are liable for any breach of the terms of this Agreement by such third party.
5. Software Warranty. We warrant that the Tyler Software will perform without Defects during the term of this Agreement. If the Tyler Software does not perform as warranted, we will use all reasonable efforts, consistent with industry standards, to cure the Defect in accordance with our then-current Support Call Process.
6. SaaS Services.
 - 6.1. *Audit & Compliance*. Our SaaS Services are audited at least yearly in accordance with the AICPA's Statement on Standards for Attestation Engagements ("SSAE") No. 21. We have attained, and will maintain, SOC 1 and SOC 2 compliance, or their equivalent, for so long as you are timely paying for SaaS Services. The foregoing notwithstanding, you acknowledge that the scope of audit coverage varies depending on the specific Tyler Software solution. We will provide you with a summary of our current compliance report(s) or its equivalent, upon your request. For the avoidance of doubt, if our SaaS Services are provided using a third-party data center, the compliance report may be for that third-party provider and be subject to confidential treatment in accordance with applicable law. If you want us to provide our compliance reports to a third-party auditor or similar entity, we reserve the right to require execution of an NDA by that third party.
 - 6.2. *Service Levels*. The Tyler Software will be made available to you according to the terms of the SLA. Tyler SaaS Services will be provided via a third-party data center. Your Data will be inaccessible to our other customers.
 - 6.3. *Business Continuity*. Data centers used to deliver SaaS Services for this Agreement have redundant telecommunications access, electrical power, and the required hardware to provide access to the SaaS Services in the event of a disaster or component failure. We test our disaster recovery plan on an annual basis. The plan is not client specific and is detailed in Tyler's System & Organization Control reports or their equivalent. In the event of a data center failure, we reserve the right to employ our disaster recovery plan for resumption of the SaaS Services. In that event, we commit to a Recovery Point Objective ("RPO") of 24 hours and a Recovery Time Objective ("RTO") of 24 hours. RPO represents the maximum duration of time between the most recent recoverable copy of your hosted Data and subsequent data center failure. RTO represents the maximum duration of time following data center failure within which your access to the Tyler Software must be restored. If we employ our disaster recovery plan, we will be responsible for restoring your Data and ensuring that the SaaS Services are online, and you will

be responsible for validating your Data and confirming the functioning of the SaaS Services, including any integrations.

6.4. *Security Measures.* We provide secure Data transmission paths between your devices and the data center used to provide SaaS Services to you. Data centers used to provide SaaS Services are accessible only by authorized personnel with a unique key entry or comparable security. We conduct annual penetration testing of either the production network and/or web application to be performed. We will maintain industry standard intrusion detection and prevention systems to monitor malicious activity in the network and to log and block any such activity. You may not attempt to bypass or subvert security restrictions in the SaaS Services or environments related to the Tyler Software. Unauthorized attempts to access files, passwords, or other confidential information, and vulnerability and penetration test scanning of our network and systems (hosted or otherwise) are prohibited. Where applicable with respect to our applications that take or process card payment data, we comply with applicable requirements of PCI DSS. We agree to supply the then-current status of our PCI DSS compliance program in the form of an official Attestation of Compliance, which can be found at <https://www.tylertech.com/about-us/compliance> and, in the event of any change in our status, we will comply with applicable notice requirements.

SECTION C – PROFESSIONAL SERVICES

1. Professional Services. We will provide you the various implementation-related services itemized in the Investment Summary and if applicable, described in the Statement of Work.
2. Professional Services Fees. You agree to pay us the services fees in the amounts set forth in the Investment Summary. You acknowledge that the fees stated in the Investment Summary, unless expressly stated otherwise, are good-faith estimates of the amount of time and materials required for your implementation. We will bill you the actual fees incurred based on the in-scope services provided to you. Any discrepancies in the total values set forth in the Investment Summary will be resolved by multiplying the applicable rate by the quoted units.
3. Additional Services. The Investment Summary contains, and the Statement of Work describes, the scope of services and related costs (including programming and/or interface estimates) required for the project based on our understanding of the specifications you supplied. If additional work is required, or if you use or request additional services, we will provide you with an addendum or change order, as applicable, outlining the costs for the additional work. The price quotes in the addendum or change order will be valid for thirty (30) days from the date of the quote.
4. Cancellation. If you cancel services less than four (4) weeks in advance (other than for Force Majeure or breach by us), you will be liable for all (i) daily fees associated with cancelled professional services if we are unable to reassign our personnel and (ii) any non-refundable travel expenses already incurred by us on your behalf. We will make all reasonable efforts to reassign personnel in the event you cancel within four (4) weeks of scheduled commitments.
5. Services Warranty. We will perform services in a professional, workmanlike manner, consistent with industry standards. In the event we provide services that do not conform to this warranty, we will re-perform such services at no additional cost to you.

6. Site Access and Requirements. At no cost to us, you agree to provide us with reasonable access to your personnel, facilities, and equipment as may be reasonably necessary for us to provide implementation services, subject to any reasonable security protocols or other written policies provided to us as of the Effective Date (such as those listed in Exhibit F), and thereafter as mutually agreed to by you and us.
7. Background Checks. All of our employees undergo criminal background checks prior to hire. All employees sign our confidentiality agreement and security policies. If Contractor is required to come on-site to District property, both parties will work together in good faith to fulfill any background check requirements as may be necessary to fulfill legal obligations, at District's expense.
8. Client Assistance. You acknowledge that the implementation of the Tyler Software is a cooperative process requiring the time and resources of your personnel. You certify that you will use reasonable efforts to cooperate with us and make your resources available for the performance of the Agreement in accordance with its terms and the mutually agreed project schedule. Additionally, you agree to use all reasonable efforts to cooperate with and assist us as may be reasonably required to support the efficient execution of the activities required for this Agreement. Accordingly, you will provide notice of any known inability to timely meet a project commitment so that appropriate project adjustments can be made. We will not be liable for failure to meet any project deadlines or milestones when such failure is due to Force Majeure or to the failure by you to comply with the requirements of this paragraph.
9. Maintenance and Support Services.
 - 9.1. For the duration of this Agreement, consistent with the terms set forth in our then-current Support Call Process, we will:
 - 9.1.1. perform our maintenance and support obligations in a professional and workmanlike manner, consistent with industry standards, to provide support and resolve Defects in the Tyler Software (subject to any applicable release life cycle policy);
 - 9.1.2. provide telephone support during our established support hours as indicated in our then-current Support Call Process;
 - 9.1.3. maintain personnel that are sufficiently trained to be familiar with the Tyler Software and Third-Party Software, if any, in order to provide maintenance and support services;
 - 9.1.4. provide releases to the Tyler Software (including updates and enhancements) that we make generally available without additional charge to customers with a current SaaS Agreement.
 - 9.2. Your use of Tyler Software or SaaS Services requires that you remain current with supported releases of Tyler Software as indicated in any applicable release lifecycle policy. Our warranty and support commitments are contingent upon you using a supported version of the Tyler Software. Tyler may require you to update to a current version of the Tyler Software to address a critical issue (for example, to address an identified security vulnerability in the Tyler Software or a third-party component). Tyler will use commercially reasonable efforts to (i) minimize the number of such instances and (ii) provide as much advance notice as possible.
 - 9.3. We will use all reasonable efforts to perform support services remotely. We reserve the right to use secure third-party connectivity tools to deliver maintenance and support services. We also reserve the right to collect Tyler Software or SaaS Services telemetry for product evaluation, quality assurance, and security monitoring and enhancement purposes. You agree to

reasonably cooperate with us in providing access to your environments and Data for the purposes of providing maintenance and support services and acknowledge that our warranty, support, and service level obligations under this Agreement are contingent upon receiving reasonable access to your Data and systems.

- 9.4. For the avoidance of doubt, SaaS Fees do not include the following services: (a) onsite support; (b) application design; (c) other consulting services; or (d) telephone support outside our normal business hours as listed in our then-current Support Call Process.

SECTION D – THIRD-PARTY PRODUCTS

1. Third-Party Hardware. We will sell and deliver any Third-Party Hardware set forth in the Investment Summary for the price indicated therein. Unless otherwise indicated, installation of Third-Party Hardware will be performed by Tyler or identified third party installers.
2. Third-Party Software. Your rights under this Agreement may include rights to certain Third-Party Software. We certify that we have acquired the right to provide the Third-Party Software to you. Your rights to the Third-Party Software will be governed by the Third-Party Terms and, in the absence of such terms, this Agreement.
3. Third Party Products Warranties.
 - 3.1 We are authorized by each Developer or its authorized reseller to sell or grant access, as applicable, to the Third-Party Products.
 - 3.2 Unless otherwise expressly indicated, Third-Party Hardware will be new and unused. You will receive free and clear title to the Third-Party Hardware you purchase upon your payment in full of the purchase price.
 - 3.3 You acknowledge that we are not the manufacturer of Third-Party Products. We do not warrant or guarantee the performance of the Third-Party Products. However, we grant and pass through to you any warranty that we may receive from the Developer or supplier of the Third-Party Products.
4. Third-Party Services. If you have purchased Third-Party Services, those services will be provided independently of Tyler by such third party at the rates set forth in the Investment Summary and in accordance with Exhibit B.

SECTION E – TERM AND TERMINATION

1. Term. The initial term of this Agreement commences on the first day of the first month following the Effective Date and ends June 30, 2028, unless earlier terminated as set forth in the Agreement. Upon expiration of the initial term, this Agreement will renew automatically for additional one (1) year renewal terms at our then-current SaaS Fees unless terminated in writing by either party at least sixty (60) days prior to the end of the then-current renewal term. Your right to access or use the Tyler Software and the SaaS Services will terminate at the end of this Agreement.
2. Termination. This Agreement may be terminated as set forth below. In the event of termination, you will pay us for all undisputed fees and expenses related to the software, products, and/or services you have received, or we have incurred or delivered, prior to the effective date of

termination. Disputed fees and expenses in all terminations other than your termination for cause must have been submitted as invoice disputes in accordance with Section G(2).

- 2.1. *Failure to Pay Fees.* You acknowledge that continued access to the SaaS Services is contingent upon your timely payment of fees. We may terminate this Agreement if you do not cure a failure to pay within sixty (60) days of our notice to you that you have overdue payments.
- 2.2. *For Cause.* If you believe we have materially breached this Agreement, you will invoke the Dispute Resolution clause set forth in Section G(2). You may terminate this Agreement for cause after following the procedures set forth in Section G(2).
- 2.3. *Force Majeure.* Either party has the right to terminate this Agreement if a Force Majeure event suspends performance of the SaaS Services for a period of forty-five (45) days or more.
- 2.4. *Lack of Appropriations.* If you should not appropriate or otherwise make available funds sufficient to utilize the SaaS Services, you may unilaterally terminate this Agreement upon thirty (30) days written notice to us. You will not be entitled to a refund or offset of previously paid, but unused SaaS Fees. You agree not to use termination for lack of appropriations as a substitute for termination for convenience.

SECTION F – INDEMNIFICATION, LIMITATION OF LIABILITY AND INSURANCE

1. Intellectual Property Infringement Indemnification.

- 1.1. We will defend you against any third-party claim(s) that the Tyler Software or Documentation infringes that third-party's patent, copyright, or trademark, or misappropriates its trade secrets, and will pay the amount of any resulting adverse final judgment (or settlement to which we consent). You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.
- 1.2. Our obligations under this Section F(1) will not apply to the extent the claim or adverse final judgment is based on your use of the Tyler Software in contradiction of this Agreement, including with non-licensed third parties.
- 1.3. If an infringement or misappropriation claim is fully litigated and your use of the Tyler Software is enjoined by a court of competent jurisdiction, in addition to paying any adverse final judgment (or settlement to which we consent), we will, at our option, either:
 - 1.3.1. procure the right to continue its use;
 - 1.3.2. modify it to make it non-infringing; or
 - 1.3.3. replace it with a functional equivalent.We may elect to employ these remedies in advance of litigation if we receive information concerning an infringement or misappropriation claim.
- 1.4. This section provides your exclusive remedy for third-party copyright, patent, or trademark infringement and trade secret misappropriation claims.

2. General Indemnification.

- 2.1. We will indemnify and hold harmless you and your agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (i) personal injury, death, or damage to tangible property, all to the extent caused by our negligence or willful misconduct; or (ii) our violation of law applicable to our performance under this Agreement. You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.

2.2. District 4J agrees to be responsible for any damage or any third party liability which may arise from its responsibilities as related to services in the Agreement and subject to the limitations and conditions of the Oregon Tort Claims Act, ORS 30.260 to .300, and the Oregon Constitution Article XI, Section 7, to the extent liability arising out of the negligence of District 4J. District 4J shall not be required to indemnify or defend Contractor for any liability arising out of the wrongful acts of employees or agents of Contractor. District 4J shall indemnify, defend, and hold Contractor, its officers, agents, and employees, harmless from any claims, actions, liability, or costs, including attorney fees and other costs of defense, caused by the negligent or intentional acts or omissions of District 4J related to work performance under this Agreement. We will notify you promptly in writing of the claim and will give you sole control over its defense or settlement. We agree to provide you with reasonable assistance, cooperation, and information in defending the claim at your expense.

3. **DISCLAIMER. EXCEPT FOR THE EXPRESS WARRANTIES PROVIDED IN THIS AGREEMENT AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, WE HEREBY DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES, DUTIES, OR CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. CLIENT UNDERSTANDS AND AGREES THAT TYLER DISCLAIMS ANY LIABILITY FOR ERRORS THAT RELATE TO USER ERROR.**
4. **LIMITATION OF LIABILITY. NOTWITHSTANDING ANYTHING TO THE CONTRARY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF THIS AGREEMENT, WHETHER BASED ON A THEORY OF CONTRACT OR TORT, INCLUDING NEGLIGENCE AND STRICT LIABILITY, SHALL BE LIMITED TO YOUR ACTUAL DIRECT DAMAGES, NOT TO EXCEED (i) DURING THE INITIAL TERM, AS SET FORTH IN SECTION E(1), TOTAL FEES PAID AS OF THE TIME OF THE CLAIM; OR (ii) DURING ANY RENEWAL TERM, THE THEN-CURRENT ANNUAL SAAS FEES PAYABLE IN THAT RENEWAL TERM. THE PARTIES ACKNOWLEDGE AND AGREE THAT THE PRICES SET FORTH IN THIS AGREEMENT ARE SET IN RELIANCE UPON THIS LIMITATION OF LIABILITY AND TO THE MAXIMUM EXTENT ALLOWED UNDER APPLICABLE LAW, THE EXCLUSION OF CERTAIN DAMAGES, AND EACH SHALL APPLY REGARDLESS OF THE FAILURE OF AN ESSENTIAL PURPOSE OF ANY REMEDY. THE FOREGOING LIMITATION OF LIABILITY SHALL NOT APPLY TO CLAIMS THAT ARE SUBJECT TO SECTIONS F(1) AND F(2).**
5. **EXCLUSION OF CERTAIN DAMAGES. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL WE BE LIABLE FOR ANY SPECIAL, INCIDENTAL, PUNITIVE, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER, EVEN IF WE HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.**
6. **Insurance. During the course of performing services under this Agreement, we agree to maintain the following levels of insurance: (i) Commercial General Liability of at least \$1,000,000 per occurrence and \$2,000,000 aggregate; (ii) Automobile Liability of \$1,000,000 combined single limit; (iii) Professional Liability (inclusive of cyber protection) of \$1,000,000 per claim and in the aggregate; (iv) Workers Compensation complying with applicable statutory requirements; and (v) Excess/Umbrella Liability of \$5,000,000. We will add you as an additional insured to our Commercial General Liability and Automobile Liability policies, which will automatically add you as an additional insured to our Excess/Umbrella Liability policy as well. We will provide you with copies of certificates of insurance upon your written request.**

SECTION G – GENERAL TERMS AND CONDITIONS

1. Additional Products and Services. You may purchase additional products and services at the rates set forth in the Investment Summary for twelve (12) months from the Effective Date by executing a mutually agreed addendum. If no rate is provided in the Investment Summary, or those twelve (12) months have expired, you may purchase additional products and services at our then-current pricing, also by executing a mutually agreed addendum. The terms of this Agreement will control any such additional purchase(s), unless otherwise specifically provided in the addendum.
2. Performance Issues and Dispute Resolution.
 - 2.1. *Notice.* You agree to provide us with written notice within thirty (30) days of receipt of an invoice (for invoice disputes) or, in the case of performance, becoming aware of an issue related to our performance under this Agreement.
 - 2.2. *Invoice Issues.*
 - 2.2.1. If the issue relates to an invoice, your notice must include the following: (i) the issue(s) with the invoice; (ii) the specific fee(s) at issue; and (iii) the corrective action(s) you are requesting of Tyler.
 - 2.2.2. We will provide a response to your notice that (i) supports the validity of the invoice as issued by us; (ii) adjusts the invoice; or (iii) describes our plan to address the issues identified in your notice.
 - 2.2.3. You agree to pay all undisputed fees by the due date. You acknowledge that you forfeit your right to dispute **any** fees under this Agreement when you fail to pay undisputed fees within sixty (60) days of our notice that the fees are overdue.
 - 2.2.4. In addition to any other remedies available to us under this Agreement or law for non-payment, we reserve the right to recover from you our reasonable costs of collection associated with your failure to timely pay amounts due under this Agreement.
 - 2.2.5. WE RESERVE THE RIGHT TO SUSPEND PERFORMANCE OF ANY SERVICE, INCLUDING ACCESS TO SAAS SERVICES, FOR FAILURE TO TIMELY PAY UNDISPUTED FEES FIFTEEN (15) DAYS FOLLOWING OUR NOTICE OF INTENT TO DO SO.
 - 2.3. *Dispute Resolution.* You agree to cooperate with us in trying to reasonably resolve all disputes, including, if requested by either party, appointing a senior representative to meet and engage in good faith negotiations with our appointed senior representative. Senior representatives will convene within thirty (30) days of the written dispute notice, unless otherwise agreed. All meetings and discussions between senior representatives will be deemed confidential settlement discussions not subject to disclosure under Federal Rule of Evidence 408 or any similar applicable state rule. If we fail to resolve the dispute, then the parties shall participate in mediation in an effort to resolve the dispute. If the dispute remains unresolved after mediation, then either of us may assert our respective rights and remedies in a court of competent jurisdiction. Nothing in this section shall prevent you or us from seeking necessary injunctive relief during the dispute resolution procedures.
3. Taxes. The fees in the Investment Summary do not include any taxes, including, without limitation, sales, use, or excise tax. If you are a tax-exempt entity, you agree to provide us with a tax-exempt certificate. Otherwise, we will pay all applicable taxes to the proper authorities, and you will reimburse us for such taxes. If you have a valid direct-pay permit, you agree to provide us with a copy. For clarity, we are responsible for paying our income taxes, both federal and state, as applicable, arising from our performance of this Agreement. District 4J shall only be responsible for taxes where required by law.

4. Nondiscrimination. We will not discriminate against any employee or applicant in our employment practices or the performance of our duties, responsibilities, and obligations under this Agreement because of race, color, religion, gender, age, disability, religious beliefs, national, or ethnic origin. We will post, where appropriate, all notices related to nondiscrimination as may be required by applicable law.
5. E-Verify. We use the U.S. Department of Homeland Security's E-Verify system to confirm the eligibility of all current employees and persons hired during the contract term to perform services within the United States under this Agreement.
6. Subcontractors. We will not subcontract any Professional Services specifically for this Agreement without your prior written consent, not to be unreasonably withheld.
7. Binding Effect; No Assignment. This Agreement shall be binding on, and shall be for the benefit of, either your or our successor(s) or permitted assign(s). Neither party may assign this Agreement without the prior written consent of the other party; provided, however, your consent is not required for an assignment by us as a result of a corporate reorganization, merger, acquisition, or purchase of substantially all of our assets.
8. Force Majeure. Except for your payment obligations, neither party will be liable for delays in performing its obligations under this Agreement to the extent that the delay is caused by Force Majeure; provided, however, that within ten (10) business days of the Force Majeure event, the party whose performance is delayed provides the other party with written notice explaining the cause and extent thereof, as well as a request for a reasonable time extension equal to the estimated duration of the Force Majeure event.
9. No Intended Third-Party Beneficiaries. This Agreement is entered into solely for the benefit of you and us. No third party will be deemed a beneficiary of this Agreement, and no third party will have the right to make any claim or assert any right under this Agreement. This provision does not affect the rights of third parties under any Third-Party Terms.
10. Entire Agreement; Amendment. This Agreement represents the entire agreement between you and us with respect to the subject matter hereof, and supersedes any prior agreements, understandings, and representations, whether written, oral, expressed, or implied. Purchase orders submitted by you, if any, are for your internal administrative purposes only, and the terms and conditions contained in those purchase orders will have no force or effect. This Agreement may only be modified in writing, signed by an authorized representative of the party against whom enforcement is sought.
11. Severability. If any term or provision of this Agreement is held invalid or unenforceable, the remainder of this Agreement will be considered valid and enforceable to the fullest extent permitted by law.
12. No Waiver. In the event that the terms and conditions of this Agreement are not strictly enforced by either party, such non-enforcement will not act as or be deemed to act as a waiver or modification of this Agreement, nor will such non-enforcement prevent such party from enforcing each and every term of this Agreement thereafter.

13. Independent Contractor. We are an independent contractor for all purposes under this Agreement.
14. Notices. All notices or communications required or permitted as a part of this Agreement, such as notice of an alleged material breach for a termination for cause or a dispute that must be submitted to dispute resolution, must be in writing and will be deemed delivered upon the earlier of the following: (i) actual receipt by the receiving party; or (ii) five (5) days following deposit with registered or certified mail with proper postage affixed and addressed to the other party at the address set forth in this Agreement or such other address as the party may have designated by proper notice. The consequences for the failure to receive a notice due to improper notification by the intended receiving party of a change in address will be borne by the intended receiving party.
15. Client Lists. You agree that we may identify you by name in client lists, marketing presentations, and promotional materials.
16. Confidentiality. Both parties recognize that their respective employees and agents, in the course of performance of this Agreement, may be exposed to confidential information and that disclosure of such information could violate rights to private individuals and entities, including the parties. Confidential information is nonpublic information that a reasonable person would believe to be confidential and includes, without limitation, personal identifying information (*e.g.*, social security numbers) and trade secrets, each as defined by applicable state law. Each party agrees that it will not disclose any confidential information of the other party and further agrees to take all reasonable and appropriate action to prevent such disclosure by its employees or agents. The confidentiality covenants contained herein will survive the termination or cancellation of this Agreement. This obligation of confidentiality will not apply to information that:
- i. is in the public domain, either at the time of disclosure or afterwards, except by breach of this Agreement by a party or its employees or agents;
 - ii. a party can establish by reasonable proof was in that party's possession at the time of initial disclosure;
 - iii. a party receives from a third party who has a right to disclose it to the receiving party; or
 - iv. is the subject of a legitimate disclosure request under the open records laws or similar applicable public disclosure laws governing this Agreement; provided, however, that in the event you receive an open records or other similar applicable request, you will give us prompt notice and otherwise perform the functions required by applicable law.
17. Business License. In the event a local business license is required for us to perform services hereunder, you will promptly notify us and provide us with the necessary paperwork and/or contact information so that we may timely obtain such license.
18. Governing Law. This Agreement will be governed by and construed in accordance with the laws of your state or commonwealth of domicile, without regard to its rules on conflicts of law. Please see Exhibit F for venue provisions.
19. Multiple Originals and Authorized Signatures. This Agreement may be executed in multiple originals, any of which will be independently treated as an original document. Any electronic, faxed, scanned, photocopied, or similarly reproduced signature on this Agreement or any amendment hereto will be deemed an original signature and will be fully enforceable as if an original signature.

Each party represents to the other that the signatory set forth below is duly authorized to bind that party to this Agreement.

20. Cooperative Procurement. To the maximum extent permitted by applicable law, we agree that this Agreement may be used as a cooperative procurement vehicle by eligible jurisdictions. In such cases, we reserve the right to negotiate and customize the terms and conditions set forth herein, including but not limited to pricing, to the scope and circumstances of that cooperative procurement.
21. Data & Insights Solution Terms. Your use of certain Tyler solutions includes Tyler's Data & Insights data platform. Your rights, and the rights of any of your end users, to use Tyler's Data & Insights data platform is subject to the Data & Insights SaaS Services Terms of Service, available at: <https://www.tylertech.com/terms/data-insights-saas-services-terms-of-service>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using any of the Tyler solutions listed at the linked terms, you certify that you have reviewed, understand, and agree to said terms.
22. Compliance with Laws. Tyler, in the performance of services, will comply with all applicable state and federal laws and regulations. The fees in the Investment Summary are based, in part, on the cost of compliance with applicable laws existing as of the Effective Date. Should laws applicable to Tyler's performance under the Agreement change after the Effective Date, Tyler reserves the right to seek a change order for the additional work, time, or cost that may be required to comply with the new law or regulation.
23. Contract Documents & Order of Precedence.
 - 23.1 *Contract Documents*. This Agreement includes the following exhibits:

Exhibit A	Investment Summary
Exhibit B	Invoicing and Payment Terms
Exhibit C	Service Level Agreement
Exhibit D	Third-Party Terms
Exhibit E	Statement of Work
Exhibit F	Client-Specific Addendum
 - 23.2 *Order of Precedence*. In the event of any conflict or inconsistency between the terms of this Agreement and any exhibits, the conflict or inconsistency shall be resolved by using the following order of precedence:
 - Sections A-G of this Agreement and Exhibits A-F

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Agreement as of the date(s) set forth below.

Tyler Technologies, Inc.

Eugene School District 4J

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Address for Notices:

Tyler Technologies, Inc.
One Tyler Drive
Yarmouth, ME 04096
Attention: Chief Legal Officer

Address for Notices:

Eugene School District 4J
200 North Monroe Street
Eugene, OR 97402-4367
Attention: _____



Exhibit A

Investment Summary

The Investment Summary details the products and services to be delivered by us, or a third party, as applicable, to you under the Agreement. This Investment Summary is effective as of the Effective Date regardless of any expiration date in the Investment Summary. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

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Quoted By:
 Quote Expiration:
 Quote Name:

Carrie Hughes
 6/30/25
 School ERP Pro - SaaS - Sourcewell
 #11916

Sales Quotation For:

Eugene School District 4J
 1938 W 8th Ave
 Eugene OR 97402-4367
 Matt Brown
 brown_mat@4j.lane.edu
 Phone: +1 (541) 790-7700

Student Count:15,156 / Cost Center:0

Tyler SaaS

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Description	Unit Price	Discount	Annual
School ERP Pro			
Accounting	\$ 133,782	\$ 13,378	\$ 120,404
Accounts Receivable	\$ 11,074	\$ 1,107	\$ 9,967
AP Automation Capture with Disbursements	\$ 9,450	\$ 945	\$ 8,505
Applicant Tracking	\$ 9,607	\$ 961	\$ 8,646
Barcode Interface	\$ 4,102	\$ 410	\$ 3,692
Fixed Assets	\$ 11,074	\$ 1,107	\$ 9,967
Grant/Project Tracking	\$ 5,161	\$ 516	\$ 4,645
Human Resources	\$ 22,127	\$ 2,213	\$ 19,914
Info-Link	\$ 4,104	\$ 410	\$ 3,694
Online Evaluation Interface	\$ 1,726	\$ 173	\$ 1,553
Substitute Calling System Leave Interface	\$ 4,104	\$ 410	\$ 3,694

Substitute Calling System Time Worked Interface		\$ 5,685	\$ 569	\$ 5,116
Timecard Interface		\$ 5,202	\$ 520	\$ 4,682
Warehouse		\$ 18,455	\$ 1,846	\$ 16,609
Identity				
Identity Workforce Core [2000]		\$ 0	\$ 0	\$ 0
Content Manager				
Content Manager Enterprise		\$ 17,716	\$ 1,772	\$ 15,944
	Term # of Years:	3		
	TOTAL:	\$ 263,369	\$ 26,337	\$ 237,032

Tyler Annual

Description	Annual
School ERP Pro	
Advanced SaaS Reporting Services	\$ 9,094 ¹²⁷
TOTAL:	\$ 9,094

Services

Description	Quantity	Price	Extended Price	Maintenance
School ERP Pro				
Implementation	708	\$ 145	\$ 102,660	\$ 0
Conversions	64	\$ 145	\$ 9,280	\$ 0
Software Install Services	56	\$ 145	\$ 8,120	\$ 0
Platform Review	8	\$ 145	\$ 1,160	\$ 0
Project Management	534	\$ 170	\$ 90,780	\$ 0
Content Manager				
Auto Indexing and Redaction Services	2	\$ 145	\$ 290	\$ 0

Enterprise Services	32	\$ 145	\$ 4,640	\$ 0
Enterprise Training	48	\$ 145	\$ 6,960	\$ 0
TOTAL:			\$ 223,890	\$ 0

Tyler Fees per Transaction

Description	Unit Price
School ERP Pro	
AP Automation Disbursements	\$0.00

Summary	One Time Fees	Recurring Fees	
Total Tyler Software		\$ 237,032	128
Total Annual		\$ 9,094	
Total Tyler Services	\$ 223,890	\$ 0	
Summary Total	\$ 223,890	\$ 246,126	
Contract Total	\$ 470,016		

Comments

All services quoted herein are assumed to be delivered remote unless otherwise stated.

SaaS includes up to 200GB of storage. Should additional storage be needed, it may be purchased at the current yearly storage rate in 200GB increments.

AP Automation Disbursements - Expedited disbursement options available to vendors include instant transfer to a bank account, PayPal, Venmo and fast ACH where fees may apply. No fee options include standard ACH, and physical checks. All disbursements will be made pursuant to the terms and conditions found at <https://www.tylertech.com/client-terms/ap-automation-disbursements-software-and-services-terms-of-use>

Access to a read-only copy of your fiscal year, state and base databases, replicated a maximum of once daily to a database server in Hosting. Includes the option to load databases to a sFTP on a one time per day scheduled basis. If client currently has Premium Reporting Services, Advanced Reporting services will replace the current subscription.

Accounting - General Ledger, Budgeting, Check Manager, Purchase Card, Bank Reconciliation, Revenue Accounting; Procurement & Payables; Payroll; User Security & Administration; Employee Access; State Reporting, Tyler U

Accounts Receivable - Customer data, product item definition, invoice printing, recording of payments by invoice, cash receiving and automatic posting to general ledger.

General Fixed Assets - Purchase price and related data imported from accounts payable, warranty information, GASB 34 depreciation, powerful data inquiry and reporting.

Grant Project Tracking - Provides multi-year tracking of grant/project revenues and expenditures.

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Human Resources - Employee demographics, certificates, evaluations, contracts, salary negotiations, and user-defined fields.

InfoLink - Provides a point-and-click interface to link tables for report writing.

Online Evaluation Interface - Integration with Netchemia Evaluation System.

Warehouse - Online catalog, ordering, restocking, order filing with back order capability and barcode interface for inventory (with separate purchase of Barcode Interface Module).

Tyler's Identity Workforce currently supports the following identity providers (IdP's) for use with Tyler back-office solutions: Microsoft Active Directory through Azure AD, ADFS or Okta AD agent, Google Cloud Identity, Identity Automation RapidIdentity, and Okta. Any requirement by you to use an IdP not supported by Tyler may require additional costs, available upon request.

Barcode Scanning Interface - Integration with 3rd party Barcode scanning for Fixed Assets and Warehouse Inventory.

Content Manager (Enterprise) - Full document scanning, imaging, indexing and archival. Includes Employee Onboarding.

AP Automation Capture with Disbursements - A fully automated vendor payment system, including an automated invoice capture system and AP Invoice Access

Substitute Calling System (Leave) Interface - Interface with 3rd party timecard system (employee leave taken).

Substitute Calling System (Time Worked) Interface - Interface with 3rd party substitute calling system (substitute time worked).

Timecard Interface - Integration with 3rd party timecard system.



Exhibit B Invoicing and Payment Terms

We will provide you with the software and services set forth in the Investment Summary of the Agreement. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

Invoicing: We will invoice you for the applicable software and services in the Investment Summary as set forth below. Your rights to dispute any invoice are set forth in the Agreement.

1. Tyler Annual Services.

- 1.1. *SaaS Services.* SaaS Fees, prorated for the period beginning on the commencement of the initial term set forth in Section E(1) of this Agreement and ending June 30, 2025, and SaaS Fees for the period July 1, 2025 through June 30, 2026, are invoiced on July 1, 2025. Thereafter, your annual SaaS fees are invoiced on an annual basis for the period July 1 through June 30. Your annual SaaS fees for the initial term are set forth in the Investment Summary. Upon expiration of the initial term, your annual SaaS fees will be at our then-current rates.
- 1.2. *Other Annual Services.* Fees for annual services prorated for the period beginning on the commencement of the initial term set forth in Section E(1) of the Agreement and ending June 30, 2025, and fees for the period July 1, 2025 through June 30, 2025, are invoiced on July 1, 2025. Thereafter, annual services other than SaaS Services are invoiced on an annual basis for the period July 1 through June 30. Your annual fees for the initial term are set forth in the Investment Summary. Upon expiration of the initial term, your annual fees will be at our then-current rates.

2. Tyler Services.

- 2.1. *Professional Services Generally:* Unless otherwise indicated below, fees for Tyler services are invoiced as delivered.
- 2.2. *Consulting Services:* Fixed fee Consulting Services will be invoiced 50% upon your acceptance of the Best Practice Recommendations, by module, and 50% upon your acceptance of custom desktop procedures, by module.
- 2.3. *Conversions:* Fixed-fee conversions are invoiced 50% upon initial delivery of the converted Data, by conversion option, and 50% upon Client acceptance to load the converted Data into Live/Production environment, by conversion option. Where conversions are quoted as estimated, we will bill you the actual services delivered on a time and materials basis.
- 2.4. *Requested Modifications to the Tyler Software:* Requested modifications to the Tyler Software are invoiced (i) 50% upon delivery of specifications and (ii) 50% upon delivery of the applicable modification. You must report any failure of the modification to conform to the specifications within thirty (30) days of delivery; otherwise, the modification will be deemed to be in compliance with the specifications after the 30-day window has passed. You may still report Defects to us as set forth in this Agreement.

2.5. *Other Fixed Price Services*: Other fixed price services are invoiced as delivered. For the avoidance of doubt, where “Project Planning Services” are provided, payment will be due upon delivery of the Implementation Planning document. Dedicated Project Management services, if any, will be billed monthly in arrears, beginning on the first day of the month immediately following initiation of project planning. Strategic Program Management Services, if any, will be billed monthly in arrears, beginning on the first day of the month immediately following initiation of program planning.

3. Hardware & Third-Party Products.

3.1. *Hardware*: Hardware costs, if any, are invoiced upon delivery.

3.2. *Hardware Maintenance*: The first year maintenance fee for hardware is invoiced upon delivery of the hardware. Subsequent annual maintenance fees for hardware are invoiced annually, in advance, at then-current rates, upon each anniversary thereof.

3.3. *Third-Party Services*: Fees for Third-Party Services, if any, are invoiced as delivered, along with applicable expenses, at the rates set forth in the Investment Summary.

3.4. *Third Party Software*. License Fees for Third Party Software, in any, are invoiced when the applicable Third Party Software is made available to you for download.

3.5. *Third Party Software Maintenance*: The first year maintenance fee for the Third Party Software is invoiced when it is made available to you for downloading. Subsequent annual maintenance fees for Third Party Software are invoiced annually, in advance, at then-current rates, upon each anniversary thereof.

3.6. *Third-Party SaaS Services*. Third-Party SaaS Services fees, if any, are invoiced on an annual basis, commencing with availability of the respective Third-Party SaaS Services. Pricing for the first year of Third-Party SaaS Services is indicated in the Investment Summary. Unless expressly stated otherwise, pricing for subsequent years will be at then-current rates.

3. Transaction Fees. Unless paid directly by an end user at the time of transaction, per transaction (call, message, etc.) fees are invoiced on a monthly basis. Fees are indicated in the Investment Summary and may be increased by Tyler upon notice of no less than thirty (30) days.

4. Expenses. The service rates in the Investment Summary do not include travel expenses. Expenses for Tyler delivered services will be billed as incurred and only in accordance with our then-current Business Travel Policy.

Payment. Payment for undisputed invoices is due within forty-five (45) days of the invoice date. District 4J shall not be subject to late payment, interest, or penalties, except where required by the State of Oregon’s prompt payment policies. We prefer to receive payments electronically. Our electronic payment information is available by contacting AR@tylertech.com.



Exhibit C

SERVICE LEVEL AGREEMENT

I. Agreement Overview

This SLA operates in conjunction with, and does not supersede or replace any part of, the Agreement. It outlines the information technology service levels related to the availability of the Tyler SaaS Services that you have requested us to provide. All other support services are documented in the Support Call Process. This SLA does not apply to any Third-Party SaaS Services.

II. Definitions. Except as defined below, all defined terms have the meaning set forth in the Agreement.

Actual Attainment: The percentage of time the Tyler Software is available during a calendar month, calculated as follows: $(\text{Service Availability} - \text{Downtime}) \div \text{Service Availability}$.

Client Error Incident: Any service unavailability resulting from your applications, content or equipment, or the acts or omissions of any of your service users or third-party providers over whom we exercise no control.

Downtime: Those minutes during Service Availability, as defined below, when all users cannot launch, login, search or save primary data in the Tyler Software. Downtime does not include those instances in which only a Defect is present.

Emergency Maintenance Window: (1) maintenance that is required to patch a critical security vulnerability; (2) maintenance that is required to prevent an imminent outage of Service Availability; or (3) maintenance that is mutually agreed upon in writing by Tyler and the Client.

Planned Downtime: Downtime that occurs during a Standard or Emergency Maintenance window.

Service Availability: The total number of minutes in a calendar month that the Tyler Software is capable of receiving, processing, and responding to requests, excluding Planned Downtime, Client Error Incidents, denial of service attacks and Force Majeure. Service Availability only applies to Tyler Software being used in the production environment.

Standard Maintenance: Routine maintenance to the Tyler Software and infrastructure. Standard Maintenance is limited to five (5) hours per week.

III. **Service Availability**

a. Your Responsibilities

Whenever you experience Downtime, you must make a support call according to the procedures outlined in the Support Call Process. You will receive a support case number.

b. Our Responsibilities

When our support team receives a call from you that Downtime has occurred or is occurring, we will work with you to identify the cause of the Downtime (including whether it may be the result of Planned Downtime, a Client Error Incident, denial of service attack or Force Majeure). We will also work with you to resume normal operations.

c. Client Relief

Our targeted Attainment Goal is 100%. You may be entitled to credits as indicated in the Client Relief Schedule found below. Your relief credit is calculated as a percentage of the SaaS Fees paid for the calendar month.

In order to receive relief credits, you must submit a request through one of the channels listed in our Support Call Process within fifteen (15) days of the end of the applicable month. We will respond to your relief request within thirty (30) days of receipt.

The total credits confirmed by us will be applied to the SaaS Fee for the next billing cycle. Issuing of such credit does not relieve us of our obligations under the Agreement to correct the problem which created the service interruption.

Credits are only payable when Actual Attainment results in eligibility for credits in consecutive months and only for such consecutive months.

Client Relief Schedule	
Actual Attainment	Client Relief
99.99% - 99.70%	Remedial action will be taken
99.69% - 98.50%	2% of SaaS Fees paid for applicable month
98.49% - 97.50%	4% of SaaS Fees paid for applicable month
97.49% - 96.50%	6% of SaaS Fees paid for applicable month
96.49% - 95.50%	8% of SaaS Fees paid for applicable month
Below 95.50%	10% of SaaS Fees paid for applicable month

* Notwithstanding language in the Agreement to the contrary, Recovery Point Objective is one (1) hour.

IV. Maintenance Notifications

We perform Standard Maintenance during limited windows that are historically known to be reliably low-traffic times. If and when maintenance is predicted to occur during periods of higher traffic, we will provide advance notice of those windows and will coordinate to the greatest extent possible with you.

Not all maintenance activities will cause application unavailability. However, if Tyler anticipates that activities during a Standard or Emergency Maintenance window may make the Tyler Software unavailable, we will provide advance notice, as reasonably practicable, that the Tyler Software will be unavailable during the maintenance window.



Exhibit D Third-Party Terms

Cornerstone OnDemand Terms. Your use of Cornerstone OnDemand software and services is subject to terms found here: <https://s3.us-east-1.amazonaws.com/sumtotalsystems.com/prod/images/cornerstone-terms-of-use.pdf>. By signing a Tyler Agreement or Order Form including Cornerstone software or services, or accessing, installing, or using Cornerstone software or services, you agree that you have read, understood, and agree to such terms. In addition, implementation of Cornerstone software and services may require inclusion of a Cornerstone Statement of Work

DigEplan Pro. Your use of DigEplan Pro is subject to the LCT Software LLC Subscription Terms & Conditions found here: <https://www.tylertech.com/client-terms/lct-software-llc-an-avolve-company-subscription-terms-conditions>. By signing a Tyler Agreement or Order Form including DigEPlan Pro, or accessing, installing, or using DigEplan Pro, you agree that you have read, understood, and agree to such terms.

DocOrigin Terms. Your use of Tyler Forms software and forms is subject to the DocOrigin End User License Agreement available for download here: <https://eclipsecorp.us/eula/>. By signing a Tyler Agreement or Order Form including Tyler forms software or forms, or accessing, installing, or using Tyler Forms software or forms, you agree that you have read, understood, and agree to such terms.

Emphasys Terms. Your use of SymPro software and services is governed by terms available here: <https://tylertech.com/portals/0/terms/Emphasys-Software-Agreement/Emphasys-Software-Agreement.pdf>. By signing a Tyler Agreement or Order Form containing such software or services, or accessing, installing, or using SymPro software or services, you agree that you have read, understood, and agree to such terms.

Envisio Terms. Your use of Envisio software and services is subject to the terms found here: https://learn.envisio.com/Envisio_MasterServicesAgreement. By signing a Tyler Agreement or Order Form, or accessing, installing, or using Envisio software or services, you agree that you have read, understood, and agree to such terms.

Fire Prevention Mobile Terms. Your use of Tyler's Fire Prevention Mobile solutions is subject to the terms found here: <https://www.tylertech.com/terms/fire-prevention-mobile-third-party-terms>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using the Fire Prevention Mobile solution, you agree that you have read, understood, and agree to such terms.

Koa Hills Terms. Your use of Koa Hills SaaS is governed by terms available here: <https://www.tylertech.com/Portals/0/Terms/Koa-Hills-Software-as-a-Service-Agreement.pdf>. By signing a Tyler Agreement or Order Form containing Koa Hills SaaS, or accessing, installing, or using Koa Hills SaaS, you agree that you have read, understood, and agree to such terms.

Pattern Stream Terms. Your use of Pattern Stream software and services is subject to the terms found here: <https://www.tylertech.com/terms/finite-matters-ltd-consolidated-terms>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using Pattern Stream software or services, you agree that you have read, understood, and agree to such terms.

Polco Terms. Your use of Polco software and services is subject to the terms found here: <https://www.tylertech.com/client-terms/polco-end-user-license-agreement>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using Polco software or services, you agree that you have read, understood, and agree to such terms.

ThinPrint Terms. Your use of Tyler Forms software and forms is subject to the End User License Agreement terms for ThinPrint Engine, ThinPrint License Server, and Connected Gateway found here: <https://www.thinprint.com/en/legal-notes/eula/>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using Tyler Forms software or forms, you agree that you have read, understood, and agree to such terms.

TrueRoll Terms. Your use of TrueRoll software and services is subject to terms found here: <https://tylertech.com/portals/0/terms/TrueRoll-Software-Services-Agreement.pdf>. By signing a Tyler Agreement or Order Form including TrueRoll software or services, or accessing, installing, or using TrueRoll software or services, you agree that you have read, understood, and agree to such terms.

Twilio Acceptable Use Policy. Your use of the Tyler solutions listed below includes functionality provided by a Third-Party Developer, Twilio. Your rights, and the rights of any of your end users, to use said functionality are subject to the terms of the Twilio Acceptable Use Policy, available at <http://www.twilio.com/legal/aup>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using any such Tyler solution, you certify that you have reviewed, understand, and agree to said terms. Tyler hereby disclaims any and all liability related to your or your end user's failure to abide by the terms of the Twilio Acceptable Use Policy. Any liability for failure to abide by said terms shall rest solely with the person or entity whose conduct violated said terms.

- Electronic Warrants
- Online Dispute Resolution
- Enterprise Justice Notifications Add On (text notifications)
- Absence & Substitute
- Notify
- Enterprise Jury Manager
- Enterprise Supervision
- Virtual Court



Exhibit E
Statement of Work

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Eugene School District 4J

SOW from Tyler Technologies, Inc.

2/4/2025

Presented to:
Matt Brown
200 North Monroe St.
Eugene, OR 97402

Contact:
Carrie Hughes
Email: Carrie.Hughes@TylerTech.com
5101 Tennyson Parkway, Plano, TX 75024

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Part 1: Executive Summary

1. Project Overview

1.1 Introduction

Tyler Technologies (“Tyler”) is the largest and most established provider of integrated software and technology services focused solely on the public sector. Tyler’s end-to-end solutions empower public sector entities including local, state, provincial and federal government, to operate more efficiently and connect more transparently with their constituents and with each other. By connecting data and processes across disparate systems, Tyler’s solutions transform how clients gain actionable insights that solve problems in their communities.

1.2 Project Goals

This Statement of Work (“SOW”) documents the methodology, implementation stages, activities, and roles and responsibilities, and project scope listed in the Investment Summary of the Agreement between Tyler and the 4J (collectively the “Project”).

The overall goals of the project are to:

- Successfully implement the contracted scope on time and on budget
- Increase operational efficiencies and empower users to be more productive
- Improve accessibility and responsiveness to external and internal customer needs
- Overcome current challenges and meet future goals
- Providing a single, comprehensive, and integrated solution to manage business functions
- Streamline business processes through automation, integration, and workflows
- Provide a user-friendly user interface to promote system use and productivity
- Eliminate redundant data entry

1.3 Methodology

This is accomplished by the 4J and Tyler working as a partnership and Tyler utilizing its depth of implementation experience. While each Project is unique, all will follow Tyler’s six-stage methodology. Each of the six stages is comprised of multiple work packages, and each work package includes a narrative description, objectives, tasks, inputs, outputs/deliverables, assumptions, and a responsibility matrix.

Tailored specifically for Tyler’s public sector clients, the project methodology contains Stage Acceptance Control Points throughout each Phase to ensure adherence to scope, budget, timeline controls, effective communications, and quality standards. Clearly defined, the project methodology repeats consistently across Phases, and is scaled to meet the 4J’s complexity and organizational needs.



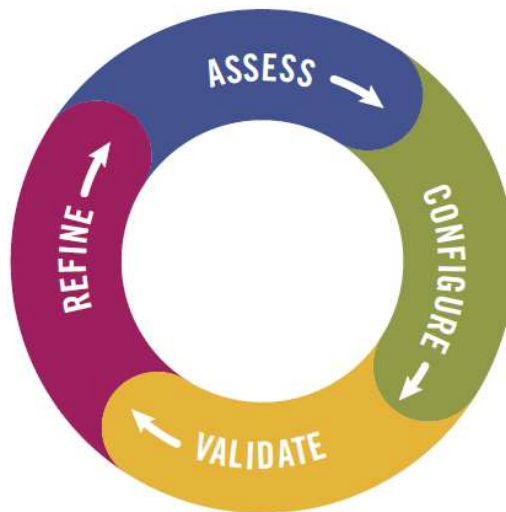
Tyler's Six Stage Project Methodology



The methodology adapts to both single-phase and multiple-phase projects.

To achieve Project success, it is imperative that both the 4J and Tyler commit to including the necessary leadership and governance. During each stage of the Project, it is expected that the 4J and Tyler Project teams work collaboratively to complete tasks. An underlying principle of Tyler's Implementation process is to employ an iterative model where the 4J's business processes are assessed, configured, validated, and refined cyclically in line with the project budget. This approach is used in multiple stages and work packages as illustrated in the graphic below.

Iterative Project Model



The delivery approach is systematic, which reduces variability and mitigates risks to ensure Project success. As illustrated, some stages, along with work packages and tasks, are intended to be overlapping by nature to complete the Project efficiently and effectively.



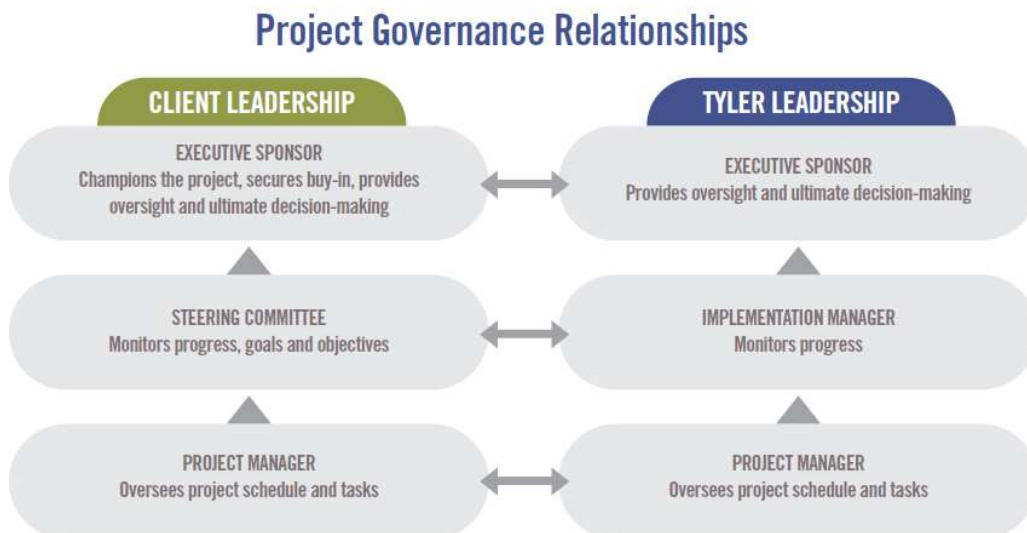
Part 2: Project Foundation

2. Project Governance

Project governance is the management framework within which Project decisions are made. The role of Project governance is to provide a decision-making approach that is logical, robust, and repeatable. This allows organizations to have a structured approach for conducting its daily business in addition to project related activities.

This section outlines the resources required to meet the business needs, objectives, and priorities for the Project, communicate the goals to other Project participants, and provide support and guidance to accomplish these goals. Project governance defines the structure for escalation of issues and risks, Change Control review and authority, and Organizational Change Management activities. Throughout the Statement of Work Tyler has provided RACI Matrices for activities to be completed throughout the implementation which will further outline responsibilities of different roles in each stage. Further refinement of the governance structure, related processes, and specific roles and responsibilities occurs during the Initiate & Plan Stage.

The chart below illustrates an overall team perspective where Tyler and the 4J collaborate to resolve Project challenges according to defined escalation paths. If project managers do not possess authority to determine a solution, resolve an issue, or mitigate a risk, Tyler implementation management and the 4J Steering Committee become the escalation points to triage responses prior to escalation to the 4J and Tyler executive sponsors. As part of the escalation process, each Project governance tier presents recommendations and supporting information to facilitate knowledge transfer and issue resolution. The 4J and Tyler executive sponsors serve as the final escalation point.



3. Project Scope Control

3.1 Managing Scope and Project Change

Project Management governance principles contend that there are three connected constraints on a Project: budget, timeline, and scope. These constraints, known as the “triple constraints” or project management triangle, define budget in terms of financial cost, labor costs, and other resource costs. Scope is defined as the work performed to deliver a product, service or result with the specified features and functions, while time is simply defined as the schedule. The Triple Constraint theory states that if you change one side of the triangle, the other two sides must be correspondingly adjusted. For example, if the scope of the Project is increased, cost and time to complete will also need to increase. The Project and executive teams will need to remain cognizant of these constraints when making impactful decisions to the Project. A simple illustration of this triangle is included here, showing the connection of each item and their relational impact to the overall Scope.



A pillar of any successful project is the ability to properly manage scope while allowing the appropriate level of flexibility to incorporate approved changes. Scope and changes within the project will be managed using the change control process outlined in the following section.

3.2 Change Control

It may become necessary to change the scope of this Project due to unforeseeable circumstances (e.g., new constraints or opportunities are discovered). This Project is being undertaken with the understanding that Project scope, schedule, and/or cost may need to change to produce optimal results for stakeholders. Changes to contractual requirements will follow the change control process specified in the final contract, and as described below.

3.3 Change Request Management

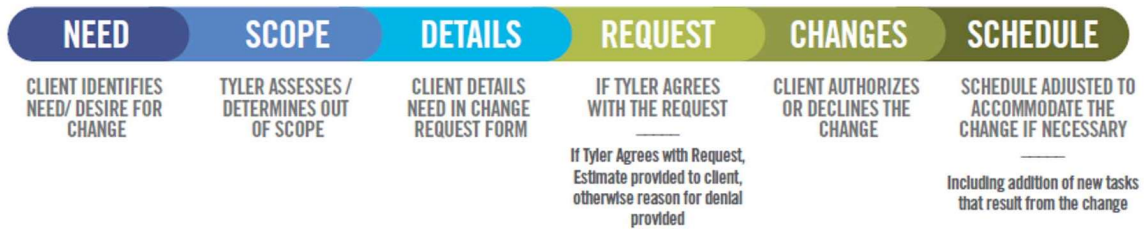
Should the need for a change to Project scope, schedule, and/or cost be identified during the Project, the change will be brought to the attention of the Steering Committee and an assessment of the change will occur. While such changes may result in additional costs and delays relative to the schedule, some changes may result in less cost to the 4J; for example, the 4J may decide it no longer needs a deliverable originally defined in the Project. The Change Request will include the following information:



- The nature of the change.
- A good faith estimate of the additional cost or associated savings to the 4J, if any.
- The timetable for implementing the change.
- The effect on and/or risk to the schedule, resource needs or resource responsibilities.

The 4J will use its good faith efforts to either approve or disapprove any Change Request within ten (10) Business Days (or other period as mutually agreeable between Tyler and the 4J). Any changes to the Project scope, budget, or timeline must be documented and approved in writing using a Change Request form. These changes constitute a formal amendment to the Statement of Work and will supersede any conflicting term in the Statement of Work.

Change Request Process



4. Acceptance Process

The implementation of a Project involves many decisions to be made throughout its lifecycle. Decisions will vary from higher level strategy decisions to smaller, detailed Project level decisions. It is critical to the success of the Project that each 4J office or department designates specific individuals for making decisions on behalf of their offices or departments.

Both Tyler and the 4J will identify representative project managers. These individuals will represent the interests of all stakeholders and serve as the primary contacts between the two organizations.

The coordination of gaining 4J feedback and approval on Project deliverables will be critical to the success of the Project. The 4J project manager will strive to gain deliverable and decision approvals from all authorized 4J representatives. Given that the designated decision-maker for each department may not always be available, there must be a designated proxy for each decision point in the Project. Assignment of each proxy will be the responsibility of the leadership from each 4J department. The proxies will be named individuals that have the authorization to make decisions on behalf of their department.

The following process will be used for accepting Deliverables and Control Points:

- The 4J shall have five (5) business days from the date of delivery, or as otherwise mutually agreed upon by the parties in writing, to accept each Deliverable or Control Point. If the 4J does not provide acceptance or acknowledgement within five (5) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.
- If the 4J does not agree the Deliverable or Control Point meets requirements, the 4J shall notify Tyler project manager(s), in writing, with reasoning within five (5) business days, or the otherwise agreed-upon timeframe, not to be unreasonably withheld, of receipt of the Deliverable.
- Tyler shall address any deficiencies and redeliver the Deliverable or Control Point. The 4J shall then have two (2) business days from receipt of the redelivered Deliverable or Control Point to accept or again submit written notification of reasons for rejecting the milestone. If the 4J does not provide acceptance within two (2) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.

5. Roles and Responsibilities

The following defines the roles and responsibilities of each Project resource for the 4J and Tyler. Roles and responsibilities may not follow the organizational chart or position descriptions at the 4J, but are roles defined within the Project. It is common for individual resources on both the Tyler and 4J project teams to fill multiple roles. Similarly, it is common for some roles to be filled by multiple people.

5.1 Tyler Roles & Responsibilities

Tyler assigns a project manager prior to the start of each Phase of the Project (some Projects may only be one Phase in duration). Additional Tyler resources are assigned as the schedule develops and as needs arise.



5.1.1 Tyler Executive Manager

Tyler executive management has indirect involvement with the Project and is part of the Tyler escalation process. This team member offers additional support to the Project team and collaborates with other Tyler department managers as needed to escalate and facilitate implementation Project tasks and decisions.

- Provides clear direction for Tyler staff on executing on the Project Deliverables to align with satisfying the 4J 's overall organizational strategy.
- Authorizes required Project resources.
- Resolves all decisions and/or issues not resolved at the implementation management level as part of the escalation process.
- Acts as the counterpart to the 4J 's executive sponsor.

5.1.2 Tyler Implementation Manager

- Tyler implementation management has indirect involvement with the Project and is part of the Tyler escalation process. The Tyler project managers consult implementation management on issues and outstanding decisions critical to the Project. Implementation management works toward a solution with the Tyler Project Manager or with 4J management as appropriate. Tyler executive management is the escalation point for any issues not resolved at this level.
- Assigns Tyler Project personnel.
- Provides support for the Project team.
- Provides management support for the Project to ensure it is staffed appropriately and staff have necessary resources.
- Monitors Project progress including progress towards agreed upon goals and objectives.

5.1.3 Tyler Project Manager

- The Tyler project manager(s) provides oversight of the Project, coordination of Tyler resources between departments, management of the Project budget and schedule, effective risk, and issue management, and is the primary point of contact for all Project related items. As requested by the 4J, the Tyler Project Manager provides regular updates to the 4J Steering Committee and other Tyler governance members. Tyler Project Manager's role includes responsibilities in the following areas:

5.1.3.1 Contract Management

- Validates contract compliance throughout the Project.
- Ensures Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions.
- Prepares and presents contract milestone sign-offs for acceptance by the 4J project manager(s).
- Coordinates Change Requests, if needed, to ensure proper Scope and budgetary compliance.

5.1.3.2 Planning

- Delivers project planning documents.
- Defines Project tasks and resource requirements.
- Develops initial Project schedule and Project Management Plan.
- Collaborates with the 4J project manager(s) to plan and schedule Project timelines to achieve on-time implementation.



5.1.3.3 Implementation Management

- Tightly manages Scope and budget of Project to ensure Scope changes and budget planned versus actual are transparent and handled effectively and efficiently.
- Establishes and manages a schedule and Tyler resources that properly support the Project Schedule and are also in balance with Scope/budget.
- Establishes risk/issue tracking/reporting process between the 4J and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to the 4J any items that may impact the outcomes of the Project.
- Collaborates with the 4J 's project manager(s) to establish key business drivers and success indicators that will help to govern Project activities and key decisions to ensure a quality outcome of the project.
- Collaborates with the 4J 's project manager(s) to set a routine communication plan that will aide all Project team members, of both the 4J and Tyler, in understanding the goals, objectives, status, and health of the Project.

5.1.3.4 Resource Management

- Acts as liaison between Project team and Tyler manager(s).
- Identifies and coordinates all Tyler resources across all applications, Phases, and activities including development, forms, installation, reports, implementation, and billing.
- Provides direction and support to Project team.
- Manages the appropriate assignment and timely completion of tasks as defined in the Project Schedule, task list, and Go-Live Checklist.
- Assesses team performance and adjusts as necessary.
- Consulted on in Scope 3rd party providers to align activities with ongoing Project tasks.

5.1.4 Tyler Implementation Consultant

- Completes tasks as assigned by the Tyler project manager(s).
- Documents activities for services performed by Tyler.
- Guides the 4J through software validation process following configuration.
- Assists during Go-Live process and provides support until the 4J transitions to Client Services.
- Facilitates training sessions and discussions with the 4J and Tyler staff to ensure adequate discussion of the appropriate agenda topics during the allotted time.
- May provide conversion review and error resolution assistance.

5.1.5 Tyler Sales

- Supports Sales to Implementation knowledge transfer during Initiate & Plan.
- Provides historical information, as needed, throughout implementation.
- Participates in pricing activities if additional licensing and/or services are needed.

5.1.6 Tyler Technical Services

- Maintains Tyler infrastructure requirements and design document(s).
- Involved in system infrastructure planning/review(s).
- Provides first installation of licensed software with initial database on servers.
- Supports and assists the project team with technical/environmental issues/needs.
- Deploys Tyler products.



5.2 4J Roles & Responsibilities

4J resources will be assigned prior to the start of each Phase of the Project. One person may be assigned to multiple Project roles.

5.2.1 4J Executive Sponsor

The 4J executive sponsor provides support to the Project by providing strategic direction and communicating key issues about the Project and its overall importance to the organization. When called upon, the executive sponsor also acts as the final authority on all escalated Project issues. The executive sponsor engages in the Project, as needed, to provide necessary support, oversight, guidance, and escalation, but does not participate in day-to-day Project activities. The executive sponsor empowers the 4J steering committee, project manager(s), and functional leads to make critical business decisions for the 4J.

- Champions the project at the executive level to secure buy-in.
- Authorizes required project resources.
- Actively participates in organizational change communications.

5.2.2 4J Steering Committee

The 4J steering committee understands and supports the cultural change necessary for the Project and fosters an appreciation for the Project's value throughout the organization. The steering committee oversees the 4J project manager and Project through participation in regular internal meetings. The 4J steering committee remains updated on all Project progress, Project decisions, and achievement of Project milestones. The 4J steering committee also serves as primary level of issue resolution for the Project.

- Works to resolve all decisions and/or issues not resolved at the project manager level as part of the escalation process.
- Attends all scheduled steering committee meetings.
- Provides support for the project team.
- Assists with communicating key project messages throughout the organization.
- Prioritizes the project within the organization.
- Ensures the project staffed appropriately and that staff have necessary resources.
- Monitors project progress including progress towards agreed upon goals and objectives.
- Has the authority to approve or deny changes impacting the following areas:
 - Cost
 - Scope
 - Schedule
 - Project Goals
 - 4J Policies
 - Needs of other client projects

5.2.3 4J Project Manager

The 4J shall assign project manager(s) prior to the start of this project with overall responsibility and authority to make decisions related to Project Scope, scheduling, and task assignment. The 4J Project Manager should communicate decisions and commitments to the Tyler project manager(s) in a timely and efficient manner. When the 4J project manager(s) do not have the knowledge or authority to make decisions, he or she engages the necessary resources to participate in discussions and make decisions in a timely fashion to avoid



Project delays. The 4J project manager(s) are responsible for reporting to the 4J steering committee and determining appropriate escalation points.

5.2.3.1 Contract Management

- Validates contract compliance throughout the project.
- Ensures that invoicing and Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions. Collaborates on and approves Change Requests, if needed, to ensure proper scope and budgetary compliance.

5.2.3.2 Planning

- Reviews and accepts project planning documents.
- Defines project tasks and resource requirements for the 4J project team.
- Collaborates in the development and approval of the project schedule.
- Collaborates with Tyler project manager(s) to plan and schedule project timelines to achieve on-time implementation.

5.2.3.3 Implementation Management

- Tightly manages project budget and scope.
- Collaborates with Tyler project manager(s) to establish a process and approval matrix to ensure that scope changes and budget (planned versus actual) are transparent and handled effectively and efficiently.
- Collaborates with Tyler project manager to establish and manage a schedule and resource plan that properly supports the project schedule as a whole and is also in balance with scope and budget.
- Collaborates with Tyler project manager(s) to establish risk and issue tracking and reporting process between the 4J and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to Tyler any items that may impact the outcomes of the project.
- Collaborates with Tyler project manager(s) to establish key business drivers and success indicators that will help to govern project activities and key decisions to ensure a quality outcome of the project.
- Routinely communicates with both the 4J staff and Tyler, aiding in the understanding of goals, objectives, current status, and health of the project by all team members.
- Manages the requirements gathering process and ensure timely and quality business requirements are being provided to Tyler.

5.2.3.4 Resource Management

- Acts as liaison between project team and stakeholders.
- Identifies and coordinates all 4J resources across all modules, phases, and activities including data conversions, forms design, hardware and software installation, reports building, and satisfying invoices.
- Provides direction and support to project team.
- Builds partnerships among the various stakeholders, negotiating authority to move the project forward.
- Manages the appropriate assignment and timely completion of tasks as defined.
- Assesses team performance and takes corrective action, if needed.
- Provides guidance to 4J technical teams to ensure appropriate response and collaboration with Tyler Technical Support Teams to ensure timely response and appropriate resolution.
- Owns the relationship with in-Scope 3rd party providers and aligns activities with ongoing project tasks.



- Ensures that users have appropriate access to Tyler project toolsets as required.
- Conducts training on proper use of toolsets.
- Validates completion of required assignments using toolsets.

5.2.4 4J Functional Leads

- Makes business process change decisions under time sensitive conditions.
- Communicates existing business processes and procedures to Tyler consultants.
- Assists in identifying business process changes that may require escalation.
- Contributes business process expertise for Current & Future State Analysis.
- Identifies and includes additional subject matter experts to participate in Current & Future State Analysis.
- Validates that necessary skills have been retained by end users.
- Provides End Users with dedicated time to complete required homework tasks.
- Acts as an ambassador/champion of change for the new process and provide business process change support.
- Identifies and communicates any additional training needs or scheduling conflicts to the 4J project manager.
- Actively participates in all aspects of the implementation, including, but not limited to, the following key activities:
 - Task completion
 - Stakeholder Meeting
 - Project Management Plan development
 - Schedule development
 - Maintenance and monitoring of risk register
 - Escalation of issues
 - Communication with Tyler project team
 - Coordination of 4J resources
 - Attendance at scheduled sessions
 - Change management activities
 - Modification specification, demonstrations, testing and approval assistance
 - Data analysis assistance
 - Decentralized end user training
 - Process testing
 - Solution Validation

5.2.5 4J Power Users

- Participate in project activities as required by the project team and project manager(s).
- Provide subject matter expertise on the 4J business processes and requirements.
- Act as subject matter experts and attend Current & Future State Analysis sessions as needed.
- Attend all scheduled training sessions.
- Participate in all required post-training processes as needed throughout project.
- Test all application configuration to ensure it satisfies business process requirements.
- Become application experts.
- Participate in Solution Validation.
- Adopt and support changed procedures.
- Complete all deliverables by the due dates defined in the project schedule.
- Demonstrate competency with Tyler products processing prior to Go-live.
- Provide knowledge transfer to the 4J staff during and after implementation.



- Participate in conversion review and validation.

5.2.6 4J End Users

- Attend all scheduled training sessions.
- Become proficient in application functions related to job duties.
- Adopt and utilize changed procedures.
- Complete all deliverables by the due dates defined in the project schedule.
- Utilize software to perform job functions at and beyond Go-live.

5.2.7 4J Technical Lead

- Coordinates updates and releases with Tyler as needed.
- Coordinates the copying of source databases to training/testing databases as needed for training days.
- Coordinates and adds new users, printers and other peripherals as needed.
- Validates that all users understand log-on process and have necessary permission for all training sessions.
- Coordinates interface development for 4J third party interfaces.
- Develops or assists in creating reports as needed.
- Ensures on-site system meets specifications provided by Tyler.
- Assists with software installation as needed.
- Extracts and transmits conversion data and control reports from the 4J's legacy system per the conversion schedule set forth in the project schedule.

5.2.7.1 4J Upgrade Coordination

- Becomes familiar with the software upgrade process and required steps.
- Becomes familiar with Tyler's releases and updates.
- Utilizes Tyler resources to stay abreast of the latest Tyler releases and updates, as well as the latest helpful tools to manage the 4J's software upgrade process.
- Assists with the software upgrade process during implementation.
- Manages software upgrade activities post-implementation.
- Manages software upgrade plan activities.
- Coordinates software upgrade plan activities with 4J and Tyler resources.
- Communicates changes affecting users and department stakeholders.
- Obtains department stakeholder acceptance to upgrade production environment.

5.2.8 4J Change Management Lead

- Validates that users receive timely and thorough communication regarding process changes.
- Provides coaching to supervisors to prepare them to support users through the project changes.
- Identifies the impact areas resulting from project activities and develops a plan to address them proactively.
- Identifies areas of resistance and develops a plan to reinforce the change.
- Monitors post-production performance and new process adherence.



Part 3: Project Plan

6. Project Stages

Work Breakdown Structure

The Work Breakdown Structure (WBS) is a hierarchical representation of a Project or Phase broken down into smaller, more manageable components. The top-level components are called “Stages” and the second level components are called “Work Packages”. The work packages, shown below each stage, contain the high-level work to be done. The detailed Project Schedule, developed during Project/Phase Planning and finalized during subsequent stages, lists the tasks to be completed within each work package. Each stage ends with a “Control Point”, confirming the work performed during that stage of the Project has been accepted by the 4J.

Work Breakdown Structure (WBS)

1. Initiate & Plan	2. Assess & Define	3. Prepare Solution	4. Production Readiness	5. Production	6. Close
1.1 Initial Coordination	2.1 Solution Orientation	3.1 Initial System Deployment	4.1 Solution Validation	5.1 Go Live	6.1 Phase Close Out
1.2 Project/Phase Planning	2.2 Current & Future State Analysis	3.2 Configuration	4.2 Go Live Readiness	5.2 Transition to Client Services	6.2 Project Close Out
1.3 Infrastructure Planning	2.3 Modification Analysis	3.3 Process Refinement	4.3 End User Training	5.3 Post Go Live Activities	
1.4 Stakeholder Meeting	2.4 Conversion Assessment	3.4 Conversion Delivery			
1.5 GIS Planning*	2.5 Data Assessment	3.5 Data Delivery			
		3.6 Modifications*			

**Items noted with an asterisk in the graphic above relate to specific products and services. If those products and services are not included in the scope of the contract, these specific work packages will be noted as “This work package is not applicable” in Section 6 of the Statement of Work.*



6.1 Initiate and Plan

The Initiate and Plan stage involves Project initiation, infrastructure, and planning. This stage creates a foundation for the Project by identifying and establishing sequence and timing for each Phase as well as verifying scope for the Project. This stage will be conducted at the onset of the Project, with a few unique items being repeated for the additional Phases as needed.

6.1.1 Initial Coordination

Prior to Project commencement, Tyler management assigns project manager(s). Additional Project resources will be assigned later in the Project as a Project schedule is developed. Tyler provides the 4J with initial Project documents used to gather names of key personnel, their functional role as it pertains to the Project, as well as any blackout dates to consider for future planning. the 4J gathers the information requested by the provided deadline ensuring preliminary planning and scheduling can be conducted moving the Project forward in a timely fashion. Internally, the Tyler Project Manager(s) coordinate with sales to ensure transfer of vital information from the sales process prior to scheduling a Project Planning Meeting with the 4J’s team. During this step, Tyler will work with the 4J to establish the date(s) for the Project and Phase Planning session.

Objectives:

- Formally launch the project.
- Establish project governance.
- Define and communicate governance for Tyler.
- Identify 4J project team.

STAGE 1	Initial Coordination																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Tyler project team is assigned	A	R	C	I	I	I	I		I		I						
4J project team is assigned									A	I	R	I	I	I			
Provide initial project documents to the 4J		A	R	C			C		I		I						
Gather preliminary information requested			I						A		R	C		C		C	C
Sales to implementation knowledge transfer		A	R	I	I	I	I				I						
Create Project Portal to store project artifacts and facilitate communication		A	R								I						



Inputs	Contract documents
	Statement of Work

Outputs/Deliverables	Working initial project documents
	Project portal

Work package assumptions:

- Project activities begin after the agreement has been fully executed.

6.1.2 Project/Phase Planning

Project and Phase planning provides an opportunity to review the contract, software, data conversions and services purchased, identify applications to implement in each Phase (if applicable), and discuss implementation timeframes.

During this work package Tyler will work with the 4J to coordinate and plan a formal Project planning meeting(s). This meeting signifies the start of the Project and should be attended by all 4J Project team members and the Tyler Project Manager. The meeting provides an opportunity for Tyler to introduce its implementation methodology, terminology, and Project management best practices to the 4J’s Project Team. This will also present an opportunity for project managers and Project sponsors to begin to discuss Project communication, metrics, status reporting and tools to be used to measure Project progress and manage change.

Tyler will work with the 4J Project Team to prepare and deliver the Project Management Plan as an output of the planning meeting. This plan will continue to evolve and grow as the Project progresses and will describe how the project will be executed, monitored, and controlled.

During project planning, Tyler will introduce the tools that will be used throughout the implementation. Tyler will familiarize the 4J with these tools during project planning and make them available for review and maintenance as applicable throughout the project. Some examples are Solution validation plan, issue log, and go-live checklist.

STAGE 1	Project/Phase Planning																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Schedule and conduct planning session(s)		A	R						I		C	C	I				



Develop Project Management Plan		A	R						I		C	C	I				
Develop initial project schedule		A	R	I	I	I	I		I	I	C	C	I	I	C		I

Inputs	Contract documents
	Statement of Work
	Guide to Starting Your Project

Outputs / Deliverables	Acceptance Criteria [only] for Deliverables
Project Management Plan	Delivery of document
Project Operational Plan	Delivery of document
Initial Project Schedule	4J provides acceptance of schedule based on resource availability, project budget, and goals.

Work package assumptions:

- 4J has reviewed and completed the Guide to Starting Your Project document.

6.1.3 Infrastructure Planning

Procuring required hardware and setting it up properly is a critical part of a successful implementation. Tyler will be responsible for building the environments for a hosted/SaaS deployment, unless otherwise identified in the Agreement. . The 4J is responsible for the installation, setup and maintenance of all peripheral devices.

Objectives:

- Ensure the 4J’s infrastructure meets Tyler’s application requirements.
- Ensure the 4J’s infrastructure is scheduled to be in place and available for use on time.

STAGE 1	Infrastructure Planning																
	Tyler								4J								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts	Department Heads	End Users	Technical Leads
Initial Infrastructure Communication		A	R		C		C				C						C
Schedule Environment Availability		A	R				C				I						

Inputs	Initial Infrastructure Requirements
--------	-------------------------------------



Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Completed Infrastructure Requirements	Delivery of Requirements

6.1.4 Stakeholder Meeting

Communication of the Project planning outcomes to the 4J Project team, executives and other key stakeholders is vital to Project success. The Stakeholder meeting is a strategic activity to inform, engage, gain commitment, and instill confidence in the 4J team. During the meeting, the goals and objectives of the Project will be reviewed along with detail on Project scope, implementation methodology, roles and responsibilities, Project timeline and schedule, and keys to Project success.

Objectives:

- Formally present and communicate the project activities and timeline.
- Communicate project expectations.

STAGE 1	Stakeholder Meeting																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Create Stakeholder Meeting Presentation	I	A	R	I	I				I	I	C		I				
Review Stakeholder Meeting Presentation		I	C						A		R		C				
Perform Stakeholder Meeting Presentation	I	A	R	I	I				I	I	C	I	I	I	I	I	I

Inputs	Agreement
	SOW
	Project Management Plan

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Stakeholder Meeting Presentation	

Work package assumptions:

- None



6.1.5 This work package is not applicable.

6.1.6 Control Point 1: Initiate & Plan Stage Acceptance

Acceptance criteria for this stage includes completion of all criteria listed below.

Note: Advancement to the Assess & Define stage is not dependent upon Tyler’s receipt of this stage acceptance.

Initiate & Plan Stage Deliverables:

- Project Management Plan
- Initial Project Schedule

Initiate & Plan stage acceptance criteria:

- All stage deliverables accepted based on acceptance criteria previously defined
- Project governance defined
- Project portal made available to the 4J
- Stakeholder meeting complete

6.2 Assess & Define

The Assess & Define stage will provide an opportunity to gather information related to current 4J business processes. This information will be used to identify and define business processes utilized with Tyler software. The 4J collaborates with Tyler providing complete and accurate information to Tyler staff and assisting in analysis, understanding current workflows and business processes.

6.2.1 Solution Orientation

The Solution Orientation provides the Project stakeholders a high-level understanding of the solution functionality prior to beginning the current and future state analysis. The primary goal is to establish a foundation for upcoming conversations regarding the design and configuration of the solution.

Tyler utilizes a variety of tools for the Solution Orientation, focusing on 4J team knowledge transfer such as: eLearning, documentation, or walkthroughs. The 4J team will gain a better understanding of the major processes and focus on data flow, the connection between configuration options and outcome, integration, and terminology that may be unique to Tyler’s solution.

Objectives:

- Provide a basic understanding of system functionality.
- Prepare the 4J for current and future state analysis.

STAGE 2	Solution Orientation	
	Tyler	4J



RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
	Provide pre-requisites			A	R						I	I		I	I		I
	Complete pre-requisites										A	R		C			C
	Conduct orientation			A	R						I	I		I	I		I

Inputs	Solution orientation materials
	Training Plan

6.2.2 Current & Future State Analysis

The Current & Future State Analysis provides the Project stakeholders and Tyler an understanding of process changes that will be achieved with the new system.

The 4J and Tyler will evaluate current state processes, options within the new software, pros and cons of each based on current or desired state and make decisions about the future state configuration and processing. This may occur before or within the same timeframe as the configuration work package. The options within the new software will be limited to the scope of this implementation and will make use of standard Tyler functionality.

The 4J will adopt the existing Tyler solution wherever possible to avoid project schedule and quality risk from over customization of Tyler products. It is the 4J's responsibility to verify that in-scope requirements are being met throughout the implementation if functional requirements are defined as part of the contract. The following guidelines will be followed when evaluating if a modification to the product is required:

- A reasonable business process change is available.
- Functionality exists which satisfies the requirement.
- Configuration of the application satisfies the requirement.
- An in-scope modification satisfies the requirement.

Requirements that are not met will follow the agreed upon change control process and can have impacts on the project schedule, scope, budget, and resource availability.

STAGE 2	Current & Future State Analysis	
	Tyler	4J



RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Current State process review			A	R	I	I	I				C	C	C	C			C
Discuss future-state options			A	R	C	C	C				C	C	C	C			C
Make future-state decisions (non-COTS)			C	C	C	C	C				A	R	I	C			C
Document anticipated configuration options required to support future state			A	R	C	C	C				I	I	I	I			I

Inputs	4J current state documentation
	Solution Orientation completion

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Documentation that describes future-state decisions and configuration options to support future-state decisions.	Delivery of document

Work package assumptions:

- 4J attendees possess sufficient knowledge and authority to make future state decisions.
- The 4J is responsible for any documentation of current state business processes.
- The 4J can effectively communicate current state processes.

6.2.3 This work package is not applicable.

6.2.4 Conversion Assessment

Data Conversions are a major effort in any software implementation. Tyler’s conversion tools facilitate the predictable, repeatable conversion process that is necessary to support a successful transition to the Tyler system. The first step in this process is to perform an assessment of the existing (“legacy”) system(s), to better understand the source data, risks, and options available. Once the data has been analyzed, the plan for data conversion is completed and communicated to the appropriate stakeholders.

Objectives:

- Communicate a common understanding of the project goals with respect to data.
- Ensure complete and accurate source data is available for review/transfer.
- Map the data from the source to the Tyler system.



- Document the data conversion/loading approach.

STAGE 2	Data Conversion Assessment																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Extract Data from Source Systems			I		C						A						R
Review and Scrub Source Data			I	I	I						A	R		C			I
Build/Update Data Conversion Plan			R	C	C						C	I	I	I			I

Inputs	4J Source data
	4J Source data Documentation (if available)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Data Conversion Plan built/updated	4J Acceptance of Data Conversion Plan, if Applicable

Work package assumptions:

- Tyler will be provided with data from the Legacy system(s) in a mutually agreed upon format.
- Tyler will work with the 4J representatives to identify business rules before writing the conversion.
- 4J subject matter experts and resources most familiar with the current data will be involved in the data conversion planning effort.

6.2.5 Control Point 2: Assess & Define Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below.

Note: Advancement to the Prepare Solution Stage is dependent upon Tyler’s receipt of the Stage Acceptance.

Assess & Define Stage Deliverables:

- Documentation of future state decisions and configuration options to support future state decisions.
- Modification specification document.
- Assess & Define Stage Acceptance Criteria:
- All stage deliverables accepted based on criteria previously defined.



- Solution Orientation is delivered.
- Conversion data extracts are received by Tyler.
- Data conversion plan built.

6.3 Prepare Solution

During the Prepare Solution stage, information gathered during the Initiate & Plan and Assess & Define stages will be used to install and configure the Tyler software solution. Software configuration will be validated by the 4J against future state decisions defined in previous stages and processes refined as needed to ensure business requirements are met.

6.3.1 Initial System Deployment

The timely availability of the Tyler Solution is important to a successful Project implementation. The success and timeliness of subsequent work packages are contingent upon the initial system deployment of Tyler Licensed Software on an approved network and infrastructure. Delays in executing this work package can affect the project schedule.

Objectives:

- All licensed software is installed and operational.
- The 4J can access the software.

STAGE 3	Initial System Deployment (Hosted/SaaS)*																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Prepare hosted environment			A				R				I						C
Install Licensed Software for Included Environments			A				R				I						C
Install Licensed Software on 4J Devices (if applicable)			I				C				A						R
Tyler System Administration Training (if applicable)			A				R				I						C



Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Licensed Software is Installed on the Server(s)	Software is accessible
	Licensed Software is Installed on 4J Devices (if applicable)	Software is accessible
	Installation Checklist/System Document	

Work package assumptions:

- The most current available version of the Tyler Licensed Software will be installed.
- The 4J will provide network access for Tyler modules, printers, and Internet access to all applicable 4J and Tyler Project staff.

6.3.2 Configuration

The purpose of Configuration is to prepare the software product for validation.

Tyler staff collaborates with the 4J to complete software configuration based on the outputs of the future state analysis performed during the Assess and Define Stage. The 4J collaborates with Tyler staff iteratively to validate software configuration.

Objectives:

- Software is ready for validation.
- Educate the 4J Power User how to configure and maintain software.
- Prepare standard interfaces for process validation (if applicable).

STAGE 3	Configuration																
	Tyler								4J								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Conduct configuration training			A	R							I	C		C			
Complete Tyler configuration tasks (where applicable)			A	R							I	I		I			
Complete 4J configuration tasks (where applicable)			I	C							A	R		C			
Standard interfaces configuration and training (if applicable)			A	R			C				I	C		C			C



Updates to Solution Validation testing plan			C	C							A	R		C			C
---	--	--	---	---	--	--	--	--	--	--	---	---	--	---	--	--	---

Inputs	Documentation that describes future state decisions and configuration options to support future state decisions.
--------	--

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Configured System	

Work package assumptions:

- Tyler provides guidance for configuration options available within the Tyler software. The 4J is responsible for making decisions when multiple options are available.

6.3.3 Process Refinement

Tyler will educate the 4J users on how to execute processes in the system to prepare them for the validation of the software. The 4J collaborates with Tyler staff iteratively to validate software configuration options to support future state.

Objectives:

- Ensure that the 4J understands future state processes and how to execute the processes in the software.
- Refine each process to meet the business requirements.
- Validate standard interfaces, where applicable.
- Validate forms and reports, where applicable.

STAGE 3	Process Refinement																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Conduct process training			A	R							I	C	I	C			
Confirm process decisions			I	C						A	R	C	I	C			
Test configuration			I	C							A	R		C			
Refine configuration (4J Responsible)			I	C							A	R		C			



Refine configuration (Tyler Responsible)			A	R								I	I		I				
Validate interface process and results			I	C				C				A	R		C				C
Update 4J-specific process documentation (if applicable)			I	C								A	R		C				
Updates to Solution Validation testing plan			C	C								A	R		C				C

Inputs	Initial Configuration
	Documentation that describes future state decisions and configuration options to support future state decisions.
	Solution validation test plan

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated solution validation test plan	
	Completed 4J-specific process documentation (completed by 4J)	

Work package assumptions:

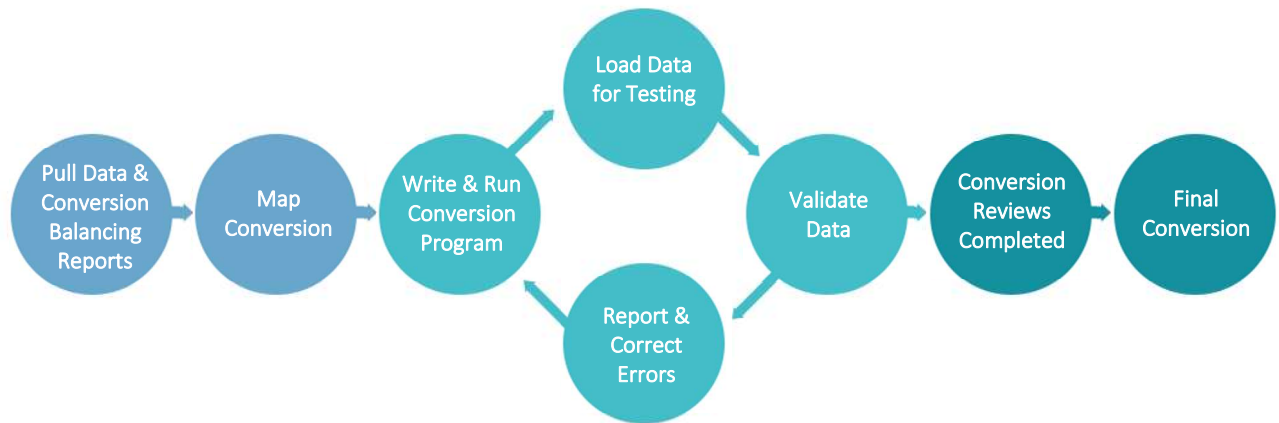
- None

6.3.4 Conversion Delivery

The purpose of this task is to transition the 4J’s data from their source (“legacy”) system(s) to the Tyler system(s). The data will need to be mapped from the legacy system into the new Tyler system format. A well-executed data conversion is key to a successful cutover to the new system(s).

With guidance from Tyler, the 4J will review specific data elements within the system and identify / report discrepancies. Iteratively, Tyler will collaborate with the 4J to address conversion discrepancies. This process will allow for clean, reconciled data to transfer from the source system(s) to the Tyler system(s). Reference Conversion Appendix for additional detail.





Objectives:

- Data is ready for production (Conversion).

STAGE 3	Data Delivery & Conversion																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Provide data crosswalks/code mapping tool			A	C	R						I	I		I			
Populate data crosswalks/code mapping tool			I	C	C						A	R		C			
Iterations: Conversion Development			A	C	R						I						I
Iterations: Deliver converted data			A		R		I				I						I
Iterations: Proof/Review data and reconcile to source system			C	C	C						A	R		C			C



Inputs	
	Data Conversion Plan
	Configuration

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Code Mapping Complete / Validated	
	Conversion Iterations / Reviews Complete	Conversion complete, verified, and ready for final pass

Work package assumptions:

- The 4J will provide a single file layout per source system as identified in the investment summary.
- The 4J subject matter experts and resources most familiar with the current data will be involved in the data conversion effort.
- The 4J project team will be responsible for completing the code mapping activity, with assistance from Tyler.

6.3.5 This work package is not applicable.

6.3.6 Control Point 3: Prepare Solution Stage Acceptance

Acceptance criteria for this Stage includes all criteria listed below in each Work Package.

Note: Advancement to the Production Readiness Stage is dependent upon Tyler’s receipt of the Stage Acceptance.

Prepare Solution Stage Deliverables:

- Licensed software is installed.
- Installation checklist/system document.
- Conversion iterations and reviews complete.

Prepare Solution Stage Acceptance Criteria:

- All stage deliverables accepted based on criteria previously defined.
- Software is configured.
- Solution validation test plan has been reviewed and updated if needed.

6.4 Production Readiness

Activities in the Production Readiness stage will prepare the 4J team for go-live through solution validation, the development of a detailed go-live plan and end user training. A readiness assessment will be conducted with the 4J to review the status of the project and the organizations readiness for go-live.

6.4.1 Solution Validation

Solution Validation is the end-to-end software testing activity to ensure that the 4J verifies all aspects of the Project (hardware, configuration, business processes, etc.) are functioning properly, and validates that all features and functions per the contract have been deployed for system use.



Objectives:

- Validate that the solution performs as indicated in the solution validation plan.
- Ensure the 4J organization is ready to move forward with go-live and training (if applicable).

STAGE 4	Solution Validation																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Update Solution Validation plan			A	R	C						C	C		C			
Update test scripts (as applicable)			C	C	C						A	R		C			
Perform testing			C	C	C						A	R		C			
Document issues from testing			C	C	C						A	R		C			
Perform required follow-up on issues			A	R	C						C	C		C			

Inputs	Solution Validation plan
	Completed work product from prior stages (configuration, business process, etc.)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Solution Validation Report	4J updates report with testing results

Work package assumptions:

- Designated testing environment has been established.
- Testing includes current phase activities or deliverables only.

6.4.2 Go-Live Readiness

Tyler and the 4J will ensure that all requirements defined in Project planning have been completed and the Go-Live event can occur, as planned. A go-live readiness assessment will be completed identifying risks or actions items to be addressed to ensure the 4J has considered its ability to successfully Go-Live. Issues and concerns will be discussed, and mitigation options documented. Tyler and the 4J will jointly agree to move forward with transition to production. Expectations for final preparation and critical dates for the weeks leading into and during the Go-Live week will be planned in detail and communicated to Project teams.

Objectives:



- Action plan for go-live established.
- Assess go-live readiness.
- Stakeholders informed of go-live activities.

STAGE 4	Go-Live Readiness																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Perform Readiness Assessment	I	A	R	C	C	I	C	I	I	I	I		I				I
Conduct Go-Live planning session		A	R	C							C	C	C	C	C		C
Order peripheral hardware (if applicable)			I							A	R						C
Confirm procedures for Go-Live issue reporting & resolution		A	R	I	I	I	I				C	C	I	I	I	I	I
Develop Go-Live checklist		A	R	C	C						C	C	I	C			C
Final system infrastructure review (where applicable)			A				R				C						C

Inputs	Future state decisions
	Go-live checklist

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated go-live checklist	Updated Action plan and Checklist for go-live delivered to the 4J

Work package assumptions:

- None

6.4.3 End User Training

End User Training is a critical part of any successful software implementation. Using a training plan previously reviewed and approved, the Project team will organize and initiate the training activities.

Train the Trainer: Tyler provides one occurrence of each scheduled training or implementation topic. 4J users who attended the Tyler sessions may train additional users. Additional Tyler led sessions may be contracted at the applicable rates for training.



Tyler will provide standard application documentation for the general use of the software. It is not Tyler’s responsibility to develop 4J specific business process documentation. 4J-led training labs using 4J specific business process documentation if created by the 4J can be added to the regular training curriculum, enhancing the training experiences of the end users.

Objectives:

- End users are trained on how to use the software prior to go-live.
- The 4J is prepared for on-going training and support of the application.

STAGE 4	End User Training																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Update training plan		A	R	C							C		I		C		
End User training (Tyler-led)		A	R	C							C	C	I	C	C	C	
Train-the-trainer		A	R	C							C	C	I	C			
End User training (4J-led)			C	C							A	R	I	C	C	C	

Inputs	Training Plan
	List of End Users and their Roles / Job Duties
	Configured Tyler System

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	End User Training	4J signoff that training was delivered

Work package assumptions:

- The 4J project team will work with Tyler to jointly develop a training curriculum that identifies the size, makeup, and subject-area of each of the training classes.
- Tyler will work with the 4J as much as possible to provide end-user training in a manner that minimizes the impact to the daily operations of 4J departments.
- The 4J will be responsible for training new users after go-live (exception—previously planned or regular training offerings by Tyler).

6.4.4 Control Point 4: Production Readiness Stage Acceptance

Acceptance criteria for this stage includes all criteria listed below. Advancement to the Production stage is dependent upon Tyler’s receipt of the stage acceptance.



Production Readiness stage deliverables:

- Solution Validation Report.
- Update go-live action plan and/or checklist.
- End user training.

Production Readiness stage acceptance criteria:

- All stage deliverables accepted based on criteria previously defined.
- Go-Live planning session conducted.

6.5 Production

Following end user training the production system will be fully enabled and made ready for daily operational use as of the scheduled date. Tyler and the 4J will follow the comprehensive action plan laid out during Go-Live Readiness to support go-live activities and minimize risk to the Project during go-live. Following go-live, Tyler will work with the 4J to verify that implementation work is concluded, post go-live activities are scheduled, and the transition to Client Services is complete for long-term operations and maintenance of the Tyler software.

6.5.1 Go-Live

Following the action plan for Go-Live, defined in the Production Readiness stage, the 4J and Tyler will complete work assigned to prepare for Go-Live.

The 4J provides final data extract and Reports from the Legacy System for data conversion and Tyler executes final conversion iteration, if applicable. If defined in the action plan, the 4J manually enters any data added to the Legacy System after final data extract into the Tyler system.

Tyler staff collaborates with the 4J during Go-Live activities. The 4J transitions to Tyler software for day-to day business processing.

Some training topics are better addressed following Go-Live when additional data is available in the system or based on timing of applicable business processes and will be scheduled following Go-Live per the Project Schedule.

Objectives:

- Execute day to day processing in Tyler software.
- 4J data available in Production environment.

STAGE 5	Go-Live	
	Tyler	4J



RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Provide final source data extract, if applicable			C		C						A						R
Final source data pushed into production environment, if applicable			A	C	R						I	C		C			C
Proof final converted data, if applicable			C	C	C						A	R		C			
Complete Go-Live activities as defined in the Go-Live action plan			C	C	C					A	R	C	I	C			
Provide Go-Live assistance			A	R	C	C		I			C	C	I	C		I	C

Inputs	Comprehensive Action Plan for Go-Live
	Final source data (if applicable)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Data is available in production environment	4J confirms data is available in production environment

Work package assumptions:

- The 4J will complete activities documented in the action plan for Go-Live as scheduled.
- External stakeholders will be available to assist in supporting the interfaces associated with the Go-Live live process.
- The 4J business processes required for Go-Live are fully documented and tested.
- The 4J Project team and subject matter experts are the primary point of contact for the end users when reporting issues during Go-Live.
- The 4J Project Team and Power User’s provide business process context to the end users during Go-Live.

6.5.2 Transition to Client Services

This work package signals the conclusion of implementation activities for the Phase or Project with the exception of agreed-upon post Go-Live activities. The Tyler project manager(s) schedules a formal transition of the 4J onto the Tyler Client Services team, who provides the 4J with assistance following Go-Live, officially transitioning the 4J to operations and maintenance.

Objectives:



- Ensure no critical issues remain for the project teams to resolve.
- Confirm proper knowledge transfer to the 4J teams for key processes and subject areas.

STAGE 5	Transition to Client Services																
	Tyler								4J								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Transfer 4J to Client Services and review issue reporting and resolution processes	I	I	A	I	I			R	I	I	C	C		C			
Review long term maintenance and continuous improvement			A					R			C	C		C			

Inputs	Open item/issues List
--------	-----------------------

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Client Services Support Document	

Work package assumptions:

- No material project issues remain without assignment and plan.

6.5.3 Post Go-Live Activities

Some implementation activities are provided post-production due to the timing of business processes, the requirement of actual production data to complete the activities, or the requirement of the system being used in a live production state.

Objectives:

- Schedule activities that are planned for after Go-Live.
- Ensure issues have been resolved or are planned for resolution before phase or project close.

STAGE 5	Post Go-Live Activities														
	Tyler								4J						



RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Schedule contracted activities that are planned for delivery after go-live		A	R	C	C	C	C	I			C	C	I	C			C
Determine resolution plan in preparation for phase or project close out		A	R	C	C	C		I			C	C	I	C			

Inputs	List of post Go-Live activities
--------	---------------------------------

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated issues log	

Work package assumptions:

- System is being used in a live production state.

6.5.4 Control Point 5: Production Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below:

- Advancement to the Close stage is not dependent upon Tyler’s receipt of this Stage Acceptance.
- Converted data is available in production environment.

Production Stage Acceptance Criteria:

- All stage deliverables accepted based on criteria previously defined.
- Go-Live activities defined in the Go-Live action plan completed.
- Client services support document is provided.

6.6 Close

The Close stage signifies full implementation of all products purchased and encompassed in the Phase or Project. The 4J transitions to the next cycle of their relationship with Tyler (next Phase of implementation or long-term relationship with Tyler Client Services).



6.6.1 Phase Closeout

This work package represents Phase completion and signals the conclusion of implementation activities for the Phase. The Tyler Client Services team will assume ongoing support of the 4J for systems implemented in the Phase.

Objectives:

- Agreement from Tyler and the 4J teams that activities within this phase are complete.

STAGE 6	Phase Close Out																
	Tyler							4J									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Reconcile project budget and status of contract Deliverables	I	A	R						I	I	C						
Hold post phase review meeting		A	R	C	C	C	C				C	C	C	C			C
Release phase-dependent Tyler project resources	A	R	I								I						

Participants	Tyler	4J
	Project Leadership	Project Manager
	Project Manager	Project Sponsor(s)
	Implementation Consultants	Functional Leads, Power Users, Technical Leads
	Technical Consultants (Conversion, Deployment, Development)	
	Client Services	

Inputs	
	Contract
	Statement of Work
	Project artifacts

Outputs / Deliverables	Acceptance Criteria [only] for Deliverables
Final action plan (for outstanding items)	
Reconciliation Report	
Post Phase Review	



Work package assumptions:

- Tyler deliverables for the phase have been completed.

6.6.2 Project Closeout

Completion of this work package signifies final acceptance and formal closing of the Project.

At this time the 4J may choose to begin working with Client Services to look at continuous improvement Projects, building on the completed solution.

Objectives:

- Confirm no critical issues remain for the project teams to resolve.
- Determine proper knowledge transfer to the 4J teams for key processes and subject areas has occurred.
- Verify all deliverables included in the Agreement are delivered.

STAGE 6	Project Close Out																
	Tyler								4J								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Conduct post project review		A	R	C	C	C	C				C	C	C	C			C
Deliver post project report to 4J and Tyler leadership	I	A	R						I	I	C						
Release Tyler project resources	A	R	I								I						

Inputs	Contract
	Statement of Work

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Post Project Report	4J acceptance; Completed report indicating all project Deliverables and milestones have been completed

Work package assumptions:

- All project implementation activities have been completed and approved.



- No critical project issues remain that have not been documented and assigned.
- Final project budget has been reconciled and invoiced.
- All Tyler deliverables have been completed.

6.6.3 Control Point 6: Close Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below.

Close Stage Deliverables:

- Post Project Report.

Close Stage Acceptance Criteria:

- Completed report indicating all Project deliverables and milestones have been completed.

7. General Assumptions

Tyler and the 4J will use this SOW as a guide for managing the implementation of the Tyler Project as provided and described in the Agreement. There are a few assumptions which, when acknowledged and adhered to, will support a successful implementation. Assumptions related to specific work packages are documented throughout the SOW. Included here are general assumptions which should be considered throughout the overall implementation process.

7.1 Project

- Project activities will begin after the Agreement has been fully executed.
- The 4J Project Team will complete their necessary assignments in a mutually agreed upon timeframe to meet the scheduled go-live date, as outlined in the Project Schedule.
- Sessions will be scheduled and conducted at a mutually agreeable time.
- Additional services, software modules and modifications not described in the SOW or Agreement will be considered a change to this Project and will require a Change Request Form as previously referenced in the definition of the Change Control Process.
- Tyler will provide a written agenda and notice of any prerequisites to the 4J project manager(s) ten (10) business days or as otherwise mutually agreed upon time frame prior to any scheduled on-site or remote sessions, as applicable.
- Tyler will provide guidance for configuration and processing options available within the Tyler software. If multiple options are presented by Tyler, the 4J is responsible for making decisions based on the options available.
- Implementation of new software may require changes to existing processes, both business and technical, requiring the 4J to make process changes.
- The 4J is responsible for defining, documenting, and implementing their policies that result from any business process changes.

7.2 Organizational Change Management

Unless otherwise contracted by Tyler, 4J is responsible for managing Organizational Change. Impacted 4J resources will need consistent coaching and reassurance from their leadership team to embrace and accept the changes being imposed by the move to new software. An important part of change is ensuring that impacted 4J resources understand the value of the change, and why they are being asked to change.



7.3 Resources and Scheduling

- 4J resources will participate in scheduled activities as assigned in the Project Schedule.
- The 4J team will complete prerequisites prior to applicable scheduled activities. Failure to do so may affect the schedule.
- Tyler and the 4J will provide resources to support the efforts to complete the Project as scheduled and within the constraints of the Project budget.
- Abbreviated timelines and overlapped Phases require sufficient resources to complete all required work as scheduled.
- Changes to the Project Schedule, availability of resources or changes in Scope will be requested through a Change Request. Impacts to the triple constraints (scope, budget, and schedule) will be assessed and documented as part of the change control process.
- The 4J will ensure assigned resources will follow the change control process and possess the required business knowledge to complete their assigned tasks successfully. Should there be a change in resources, the replacement resource should have a comparable level of availability, change control process buy-in, and knowledge.
- The 4J makes timely Project related decisions to achieve scheduled due dates on tasks and prepare for subsequent training sessions. Failure to do so may affect the schedule, as each analysis and implementation session is dependent on the decisions made in prior sessions.
- The 4J will respond to information requests in a comprehensive and timely manner, in accordance with the Project Schedule.
- The 4J will provide adequate meeting space or facilities, including appropriate system connectivity, to the project teams including Tyler team members.
- For on-site visits, Tyler will identify a travel schedule that balances the needs of the project and the employee.

7.4 Data

- Data will be converted as provided and Tyler will not create data that does not exist.
- The 4J is responsible for the quality of legacy data and for cleaning or scrubbing erroneous legacy data.
- Tyler will work closely with the 4J representatives to identify business rules before writing the conversion. The 4J must confirm that all known data mapping from source to target have been identified and documented before Tyler writes the conversion.
- All in-scope source data is in data extract(s).
- Each legacy system data file submitted for conversion includes all associated records in a single approved file layout.
- The 4J will provide the legacy system data extract in the same format for each iteration unless changes are mutually agreed upon in advance. If not, negative impacts to the schedule, budget and resource availability may occur and/or data in the new system may be incorrect.
- The 4J Project Team is responsible for reviewing the converted data and reporting issues during each iteration, with assistance from Tyler.
- The 4J is responsible for providing or entering test data (e.g., data for training, testing interfaces, etc.)

7.5 Facilities

- The 4J will provide dedicated space for Tyler staff to work with 4J resources for both on-site and remote sessions. If Phases overlap, 4J will provide multiple training facilities to allow for independent sessions scheduling without conflict.



- The 4J will provide staff with a location to practice what they have learned without distraction.



8. Glossary

Word or Term	Definition
Acceptance	Confirming that the output or deliverable is suitable and conforms to the agreed upon criteria.
Accountable	The one who ultimately ensures a task or deliverable is completed; the one who ensures the prerequisites of the task are met and who delegates the work to those responsible. [Also see RACI]
Application	A computer program designed to perform a group of coordinated functions, tasks, or activities for the benefit of the user.
Application Programming Interface (API)	A defined set of tools/methods to pass data to and received data from Tyler software products
Agreement	This executed legal contract that defines the products and services to be implemented or performed.
Business Process	The practices, policy, procedure, guidelines, or functionality that the client uses to complete a specific job function.
Business Requirements Document	A specification document used to describe Client requirements for contracted software modifications.
Change Request	A form used as part of the Change Control process whereby changes in the scope of work, timeline, resources, and/or budget are documented and agreed upon by participating parties.
Change Management	Guides how we prepare, equip and support individuals to successfully adopt change in order to drive organizational success & outcomes
Code Mapping [where applicable]	An activity that occurs during the data conversion process whereby users equate data (field level) values from the old system to the values available in the new system. These may be one to one or many to one. Example: Old System [Field = eye color] [values = BL, Blu, Blue] maps to New Tyler System [Field = Eye Color] [value = Blue].
Consulted	Those whose opinions are sought, typically subject matter experts, and with whom there is two-way communication. [Also see RACI]
Control Point	This activity occurs at the end of each stage and serves as a formal and intentional opportunity to review stage deliverables and required acceptance criteria for the stage have been met.
Data Mapping [where applicable]	The activity determining and documenting where data from the legacy system will be placed in the new system; this typically involves prior data analysis to understand how the data is currently used in the legacy system and how it will be used in the new system.
Deliverable	A verifiable document or service produced as part of the Project, as defined in the work packages.
Go-Live	The point in time when the Client is using the Tyler software to conduct daily operations in Production.
Informed	Those who are kept up-to-date on progress, often only on completion of the task or deliverable, and with whom there is just one-way communication. [Also see RACI]



Infrastructure	The composite hardware, network resources and services required for the existence, operation, and management of the Tyler software.
Interface	A connection to and potential exchange of data with an external system or application. Interfaces may be one way, with data leaving the Tyler system to another system or data entering Tyler from another system, or they may be bi-directional with data both leaving and entering Tyler and another system.
Integration	A standard exchange or sharing of common data within the Tyler system or between Tyler applications
Legacy System	The software from which a client is converting.
Modification	Custom enhancement of Tyler’s existing software to provide features or functions to meet individual client requirements documented within the scope of the Agreement.
On-site	Indicates the work location is at one or more of the client’s physical office or work environments.
Organizational Change	The process of changing an organization's strategies, processes, procedures, technologies, and culture, as well as the effect of such changes on the organization.
Output	A product, result or service generated by a process.
Peripheral devices	An auxiliary device that connects to and works with the computer in some way. Some examples: scanner, digital camera, printer.
Phase	A portion of the Project in which specific set of related applications are typically implemented. Phases each have an independent start, Go-Live and closure dates but use the same Implementation Plans as other Phases of the Project. Phases may overlap or be sequential and may have different Tyler resources assigned.
Project	The delivery of the software and services per the agreement and the Statement of Work. A Project may be broken down into multiple Phases.
RACI	A matrix describing the level of participation by various roles in completing tasks or Deliverables for a Project or process. Individuals or groups are assigned one and only one of the following roles for a given task: Responsible (R), Accountable (A), Consulted (C), or Informed (I).
Remote	Indicates the work location is at one or more of Tyler’s physical offices or work environments.
Responsible	Those who ensure a task is completed, either by themselves or delegating to another resource. [Also see RACI]
Scope	Products and services that are included in the Agreement.



Solution	The implementation of the contracted software product(s) resulting in the connected system allowing users to meet Project goals and gain anticipated efficiencies.
Stage	The top-level components of the WBS. Each Stage is repeated for individual Phases of the Project.
Standard	Software functionality that is included in the base software (off-the-shelf) package; is not customized or modified.
Statement of Work (SOW)	Document which will provide supporting detail to the Agreement defining Project-specific activities, services, and Deliverables.
System	The collective group of software and hardware that is used by the organization to conduct business.
Test Scripts	The steps or sequence of steps that will be used to validate or confirm a piece of functionality, configuration, enhancement, or Use Case Scenario.
Training Plan	Document(s) that indicate how and when users of the system will be trained relevant to their role in the implementation or use of the system.
Validation (or to validate)	The process of testing and approving that a specific Deliverable, process, program, or product is working as expected.
Work Breakdown Structure (WBS)	A hierarchical representation of a Project or Phase broken down into smaller, more manageable components.
Work Package	A group of related tasks within a project.



Part 4: Appendices

9. Conversion

9.1 School ERP Pro Conversion Summary

9.1.1 General Ledger

- Full Chart of Accounts Listing, Descriptions, and Corresponding Account Types
- Element (Segment) Values and Descriptions

9.1.2 Purchasing & Accounts Payable

- Vendor master information, address, primary contact
- 1099 balances provided by the 4J for current calendar year (if mid-calendar year go-live)

9.1.3 Payroll & Human Resources

- Basic employee information – employee master, address, primary contact, standard dates (i.e., hire, birth, leave, termination), standard phones (i.e., work, home, cell)
- Direct Deposit Bank Information
- Federal and State Tax Withholding Information

9.1.4 Fixed Assets

- Asset master information – descriptions, serial numbers, location tracking, etc.
- Depreciation settings – i.e. schedule, useful life, salvage value

9.1.5 Warehouse Inventory

- Inventory items, item locations and item vendors
- Available Stock Levels (can be re-imported just prior to go-live)



10. Additional Appendices

10.1 This work package is not applicable.



11. Project Timeline

11.1 School ERP Pro Timeline



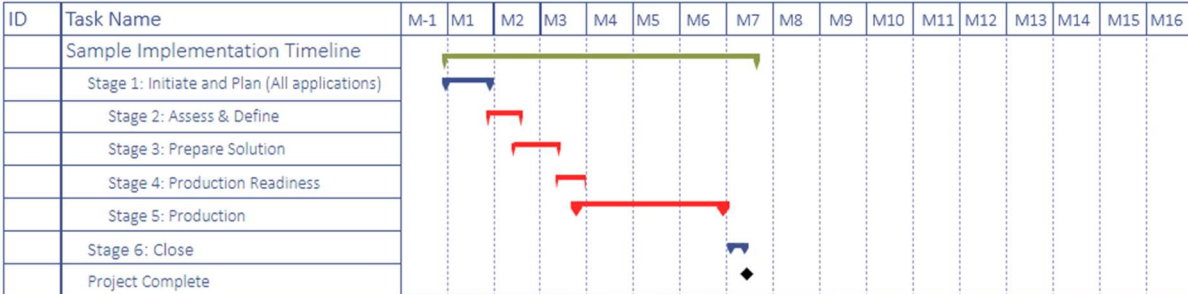
ID	Task Name	M-1	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	
	Sample Implementation Timeline	[Timeline bar from M-1 to M12]																	
	Stage 1: Initiate and Plan (All applications)	[Blue arrow from M-1 to M1]																	
	Stage 2: Assess & Define	[Red arrow from M1 to M2]																	
	Stage 3: Prepare Solution	[Red arrow from M2 to M3]																	
	Stage 4: Production Readiness	[Red arrow from M3 to M4]																	
	Stage 5: Production	[Red arrow from M4 to M5]																	
	Stage 6: Close	[Red arrow from M5 to M6]																	
	Project Complete	[Blue arrow from M6 to M7]																	

example

This timeline is an example. Please use it as a general guide...ONLY. Its purpose is to demonstrate the order in which various products are typically implemented and the potential overlap of stages for each phase. The exact timing of each deliverable depends on many factors including, but not limited to, the client's ability to commit resources to the project, client blackout dates, and the alignment of client business practices with Tyler implementation methodology. Tyler makes no guarantees that implementation schedules will align with this example.



11.2 Tyler Content Manager Enterprise Timeline



example

This timeline is an example. Please use it as a general guide...ONLY. Its purpose is to demonstrate the order in which various products are typically implemented and the potential overlap of stages for each phase. The exact timing of each deliverable depends on many factors including, but not limited to, the client's ability to commit resources to the project, client blackout dates, and the alignment of client business practices with Tyler implementation methodology. Tyler makes no guarantees that implementation schedules will align with this example.



Exhibit F Client-Specific Addendum

OREGON GOVERNMENTAL CONTRACTING ADDENDUM

As a local government entity of the State of Oregon, Eugene School District 4J (“District 4J”) is required by statute, regulation, and policy to address a number of common contractual issues. The following terms and conditions (“Government Addendum”) are incorporated into and form a part of the agreement to which they are attached (“Agreement”).

Governing Law and Venue. The laws of the State of Oregon shall govern as to the interpretations, validity, and effect of this Contract without giving effect to conflict of law provisions thereof. Any claim, action, or suit between District 4J and Contractor that arises out of or relates to the performance of this Contract shall be brought and conducted within the Circuit Court of Lane County for the State of Oregon or the United States Court for the District of Oregon.

Work Performed on District 4J Property. Contractor and Contractor staff shall comply with all policies, rules, procedures, and regulations established by District for access to and activities in and around premises controlled by District 4J, including but not limited to:

- When performing work on District 4J property, Contractor and Contractor’s employees shall be in appropriate work attire (or uniform, if applicable) at all times. Contractor attire must meet the guidelines for non- offensive, derogatory, or other requirements similar to District 4J staff.
- Each day Contractor or Contractor’s employees are present on District 4J property, they must sign in at the location’s main office and obtain an identification/visitor tag. Contractor and Contractor’s employees must display this tag on their person at all times while on District 4J property.
- All District properties are tobacco-free zones; Contractor and Contractor’s employees are prohibited from using any tobacco products on District 4J property.
- All District properties are drug-free, weapons-free, and firearms-free zones; Contractor and Contractor’s employees are prohibited from possession on their persons or in their vehicles any drug, weapon, or firearm while on District 4J property.

Obligation to Report Abuse. Contractor acknowledges District 4J’s obligations related to child abuse and sexual conduct. If there are reports or allegations of sexual conduct or child abuse involving one of Contractor’s employees, Contractor agrees to immediately comply with District 4J’s request for removal of the employee. Contractor will cooperate in any investigation being conducted by District 4J, law enforcement, DHS, ODE and/or TSPC. Contractor has received information from District 4J related to the prevention and identification of child abuse and sexual conduct, the obligations of school employees to report abuse and sexual conduct, and appropriate electronic communications with students and agrees to provide this information to any employee having direct, unsupervised contact with students. Contractor has reviews and will comply with https://www.oregonlegislature.gov/bills_laws/ors/ors419B.html.

Insurance. District 4J, in its sole and absolute discretion, retains the right to purchase and maintain insurance or self-insurance of the kinds and limits it deems necessary. District 4J shall not extend additional insured or loss payee status, or grant waivers of subrogation. Any insurance obligation imposed by the Contractor on District 4J is removed in its entirety.

Travel Expense

Reimbursement. Authorized:

Yes No

If travel expense reimbursement is authorized in this Contract, unless specifically stated and agreed upon, all travel- related expenses will be reimbursed at actual cost and not to exceed the GSA Per Diem Rates (<https://www.gsa.gov/travel/plan-book/per-diem-rates>).



ITEM FOR ACTION–CONSENT AGENDA

Date of Meeting

April 16, 2025

Title

Approve Employment Contract for Incoming Superintendent Dr. Miriam Mickelson

Presenter

Judy Newman, Board Director

Background

At a Special Board meeting, held on April 2, 2025, the Board unanimously approved to appoint Dr. Miriam Mickelson to the position of superintendent of Eugene School District 4J to take office on July 1, 2025 pending the completion of contract negotiations. At the same meeting, the Board unanimously approved to designate Board Director Judy Newman to work with legal counsel to complete contract negotiations with Dr. Miriam Mickelson and present the contract to the Board of Directors for approval at a future meeting. Contract negotiations have now been successfully completed.

The Board led a process that began last fall to identify a permanent superintendent for Eugene School District 4J. The selection process was designed to be highly inclusive and community-informed. The community engagement began with a public survey in December 2024, which invited input from students, families, staff, and community members about priorities and leadership qualities for the next superintendent. The district received 1,326 responses.

In addition, 33 focus groups were held with a wide range of participants, including students, educators, staff, families, and community partners. A total of 154 individuals, selected by lottery to ensure diverse participation, shared their perspectives through these facilitated sessions.

The feedback gathered from both the survey and focus groups was synthesized into a draft set of leadership criteria, which was shared publicly and refined through a board work session and additional public comment.

This process and confidential assurances to candidates netted the District 47 qualified candidates from across the state and country. As the Board screened candidates and interviewed semi-finalists, it narrowed the pool to three incredible talented and diverse leaders.

Finalist interviews included full-day sessions with three panels representing students, staff, families, and community members. The candidates were also interviewed by District leadership. After reviewing feedback from all the parties, the Board held additional interviews with each candidate. The entire process reflected a broad cross-section of lived experience, helping to ensure that the final decision aligned with the values and priorities of the Eugene and 4J community.

Recommendation

Approve the employment contract for Superintendent Dr. Miriam Mickelson and direct the Interim Superintendent to approve any pre-service contract for Dr. Miriam Mickelson's onboarding and preparation activities prior to July 1, 2025.



ITEM FOR INFORMATION

Date of Meeting

Date April 16, 2025

Title

Willagillespie Choir Performance

Presenter/s or who is submitting this item

Mary Poppen- Willagillespie Music Teacher and Choir Director

Background

The Willagillespie Choir is an enthusiastic group of 50 third, fourth and fifth graders chosen for their love of singing. They meet after school for one hour each week under the direction of Mary Poppen. They love to perform and are so happy to sing for you today. We will be singing 3 songs chosen by the choir:

- Kusimama- a song in Swahili which refers to standing tall and strong. Because children are closer to the ground, they are more connected to the earth.
- If I were A Fish- a song the Sheldon Choir taught us for our joint concert. It is about being glorious just the way you are.
- Ghost Ship- a favorite high seas adventure song!



Eugene School District 4J
200 North Monroe Street
Eugene, OR 97402-4295
541-790-7700
www.4j.lane.edu

ITEM FOR INFORMATION

Date of Meeting

April 16, 2023

Title

Informational Presentation on School Safety

Presenters

Jennifer Bills, Director School Safety and Emergency Management
Brooke Wagner D.Ed., Assistant Superintendent of Administrative Services

Background

This is a brief overview of the work School Safety and Emergency Management has conducted during the 2024-2025 school year. Items covered will be Safe Routes to School, Emergency Management, Behavioral Threat Assessment, Visitor and Volunteer Management, and an overview analysis of responses to criminal incidents at 4J.

SCHOOL SAFETY AND EMERGENCY MANAGEMENT

Jennifer Bills, Director

Bills_j@4j.lane.edu

(541) 790-7685

- ▶ Encompasses:
 - ▶ Physical/facilities safety
 - ▶ School Monitors
 - ▶ Behavioral Threat Assessments
 - ▶ Liaising with Law Enforcement partners
 - ▶ I Love You Guys
 - ▶ Raptor
 - ▶ Emergency Management
 - ▶ Safe Routes to School

SCHOOL SAFETY

PREVENTION, PROTECTION, MITIGATION, RESPONSE, RECOVERY

Behavioral Threat Assessment Manager, Stephanie Herro

Safe Routes to School, Sarah Mazze and Brad Albee

Emergency Management Specialist, Suzie Hunter

Management Assistant, Jolie Brantley

Security Services Program Manager, Clark Hanson

School Monitors

- ▶ South Region: Alex Nordstrand & Adrian Swartz
- ▶ North Region: Rick Raish & Marcus Morris
- ▶ Sheldon Region: Will Rogers & Christian Massey
- ▶ Churchill Region: Guy Okili da Graca & Darin Lomsdalen
- ▶ Nights: Shabazz Muhammad
- ▶ Rover: Jennifer Ewing

THE TEAM

Emergency Management

9/2024-through April 2025:

Evacuation/Fire Drills: 226

Lockdowns: 33

Secures: 33

My EOP App launched

New Emergency Guides

Reunification sites identified and scouted

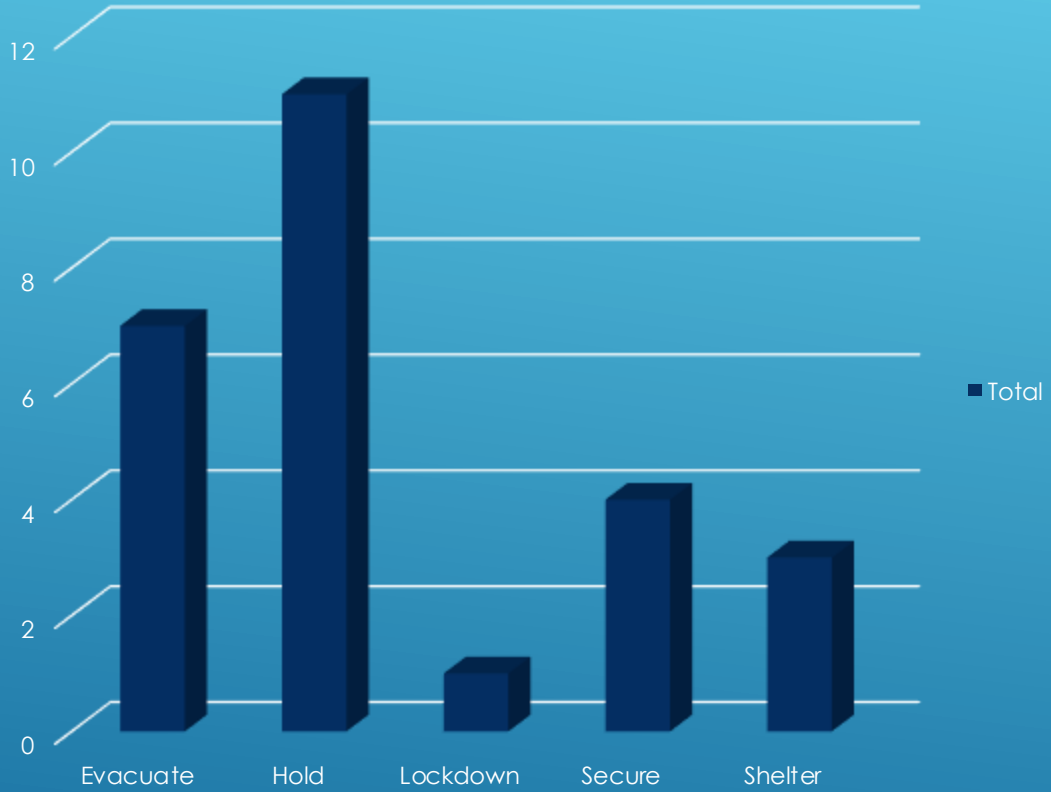
I Love You Guys Refresher Training

Raptor Refresher Training

ICS training

SRP- Hold Secure Lockdown Shelter Evacuate

Total



9/2024-4/2025

Evacuations	7
Hold	11
Lockdown	1
Secure	4
Shelter	3

196

Safe Routes to School Education Programs

9/2024- through 4/2025

- ▶ K/1 Learn to Ride in PE & Summer SEAL Program: 157 sessions (700 students)
- ▶ 8G Transit Education Program: 12 Sessions (138 students)
- ▶ K-5 Pedestrian safety, Scooter Town: 70 Sessions (1612 students)

Safe Routes to School Encouragement Programs

October Walk & Roll to School, 19 schools

May Walk & Roll to School, 15 Schools

Free Bike Repair Events, 3 schools

Bike Rodeos, 5 schools

Crossing Guard Grants, 2 (Adams and Willagillespie)

Volunteer Management

8/2024-4/2025

3,800 Backgrounds

Salem-Keizer Model is site-based, multi-disciplinary, Prevention Focus and allows for triaging to level 2

Examples of concerns addressed:

The protocol addresses a range of concerns, including threats of harm, suicidal ideation, student sexual misconduct, fire-setting behavior, and adult threats directed at staff or students

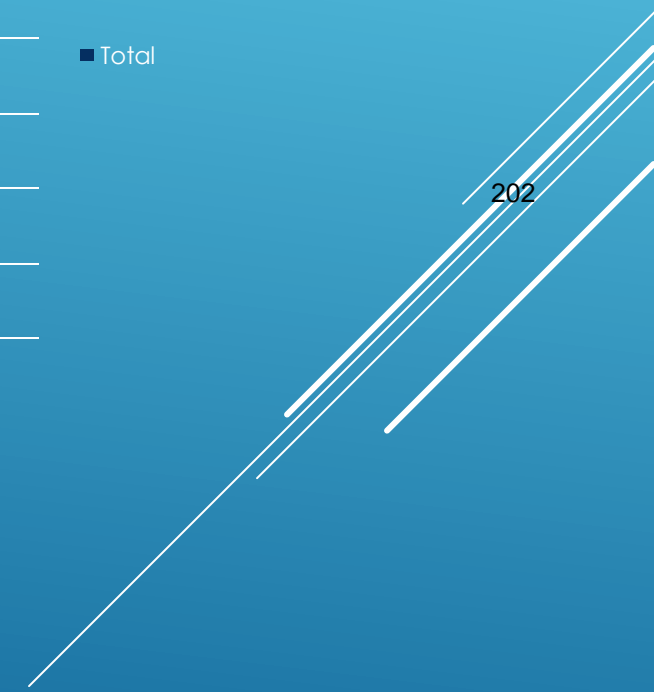
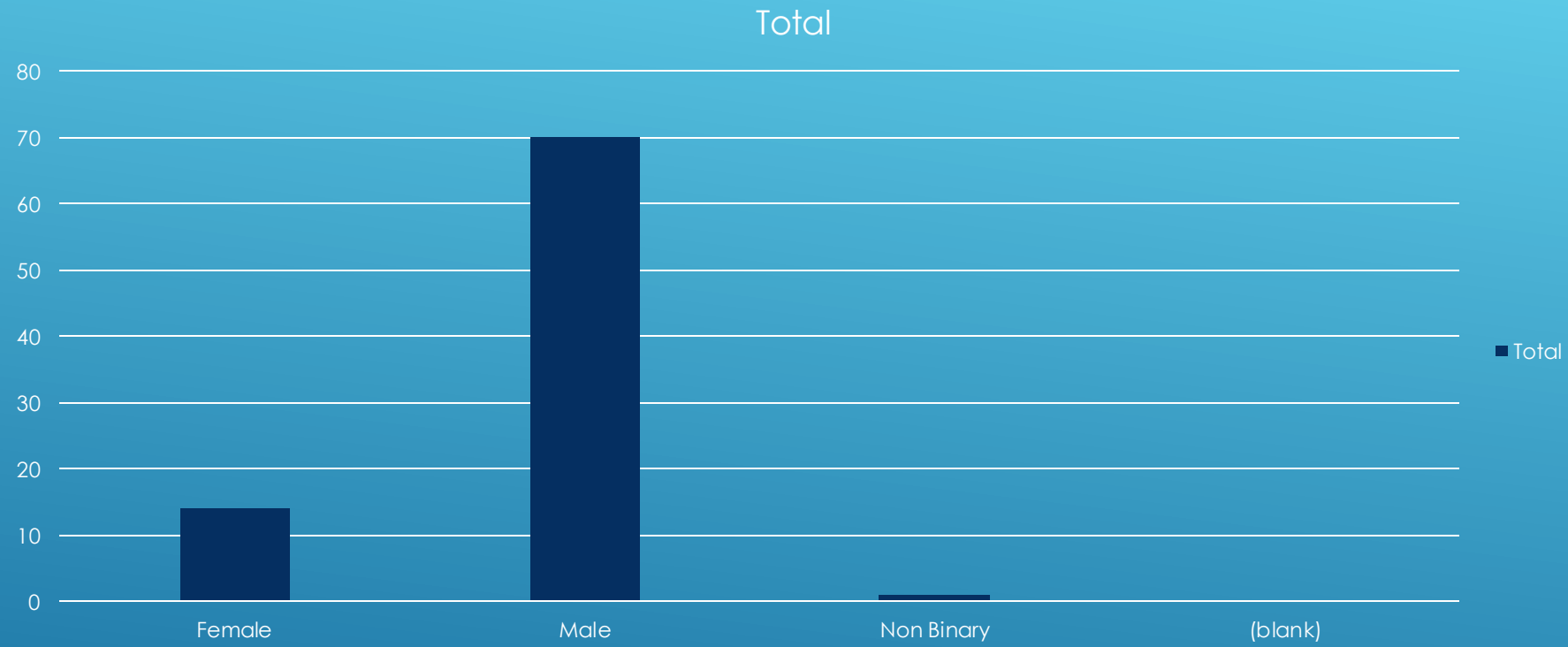
THREAT ASSESSMENTS, LEVEL 1

Behavioral Threat Assessments Level 1

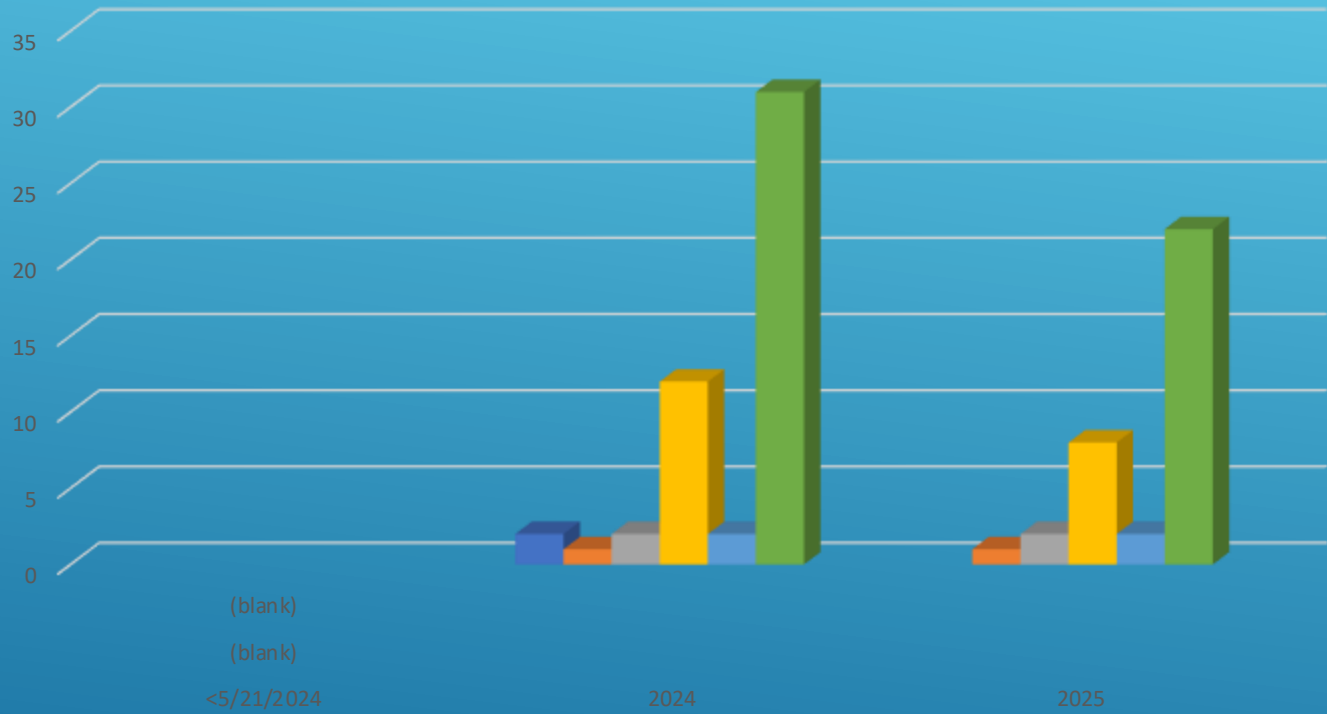
9/2024 to 4/25

Grades	Level 1 Assessments
1	8
2	17
3	5
4	4
5	6
6	14
7	6
8	6
9	4
10	2
11	3
12	9
K	1
(blank)	
Grand Total	85

201



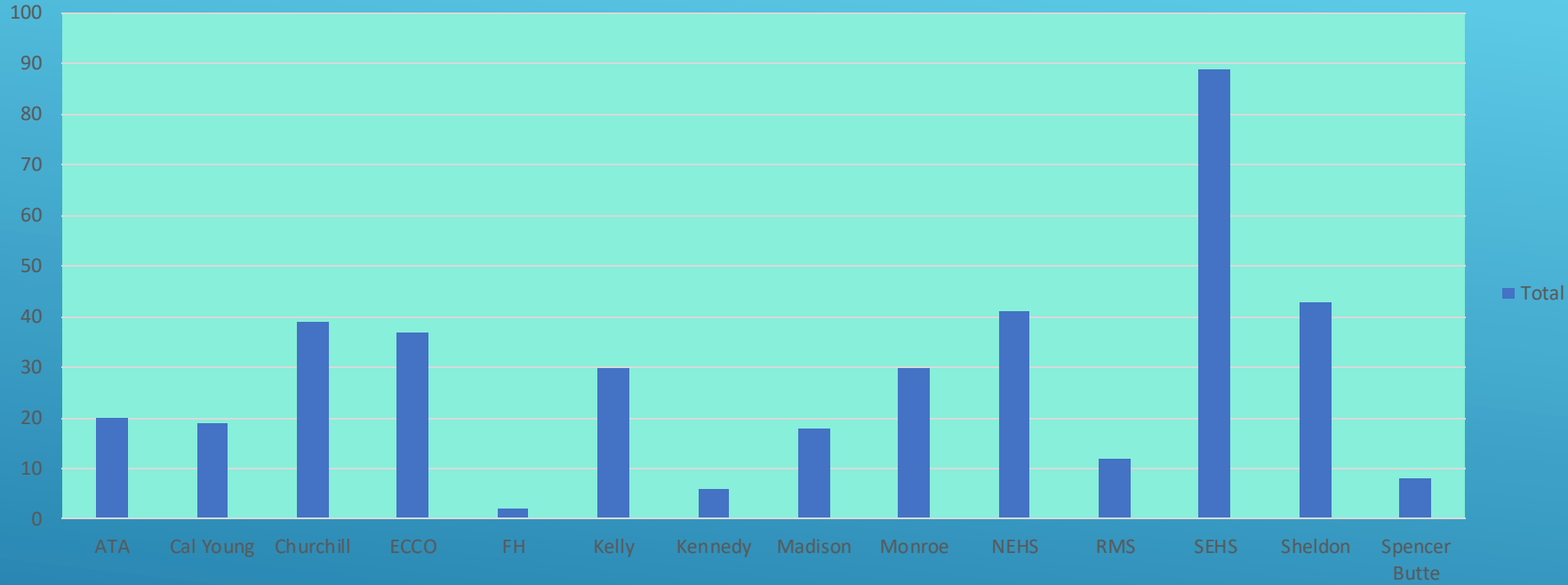
202



(blank)
 (blank)
 <5/21/2024

- American Indian/Alaskan Native
- Asian
- Black/African American
- Latino/Hispanic
- Multiple Races
- White
- (blank)

Total



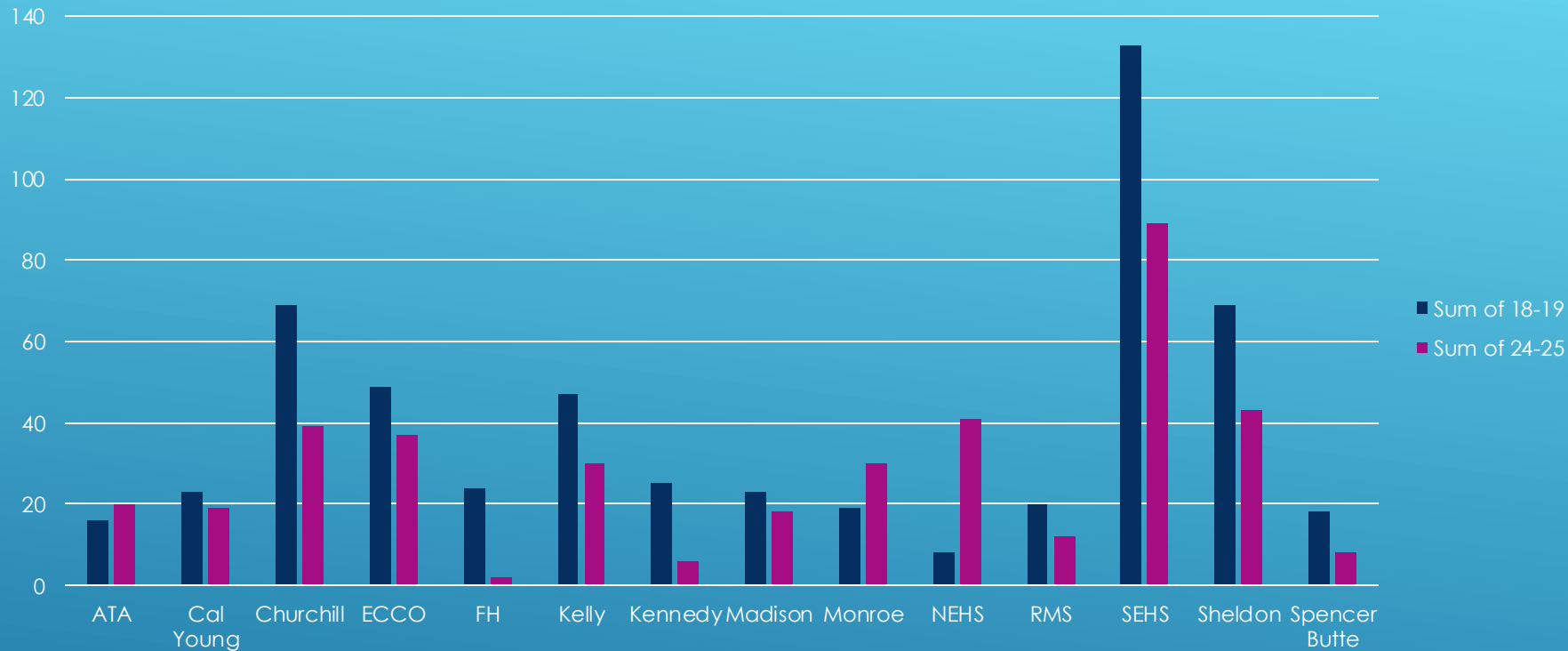
204

394 TOTAL POLICE RESPONSES

9/2024 TO 3/25/2025

Assaults	13
Child Abuse	2
Custodial	1
Disorderly Sub	13
Harassment	9
MIP	9
Property Crimes	36
Sex Crimes	14
Suicidal Subj	6
Trespass	13

TYPES OF CALLS



REPORTED POLICE CALLS FOR SERVICE

SECONDARY SCHOOLS COMPARISON SY 18-19 & SY 24-25(YTD)

- ▶ Physical Security
- ▶ Planning and preparedness
- ▶ ILUG, Raptor and drills
- ▶ Early identification and intervention
 - ▶ Working with the schools and community partners (4J's mental health practitioners, DHS, Law Enforcement, DA, Parole and Probation, etc)

KEEPING 4J SAFE
SENSE OF SAFETY AND ACTUAL SAFETY

- ▶ Decentralized reporting
- ▶ Lack of on-site law enforcement means response to non-emergency incidents can take hours or days.
- ▶ Some of our buildings are old. We are updating vestibules, cameras, etc. This falls under prevention, protection and mitigation.

GAPS, VULNERABILITIES, OPPORTUNITIES

QUESTIONS?

THANK YOU.



ITEM FOR INFORMATION

Date of Meeting

April 16, 2025

Title

Community Engagement Committee: Report out on Community & Student Chats

Presenters

Ericka Thessen, Board Director
Carmen X. Urbina, Chief of Staff

Background

Executive Summary for Presentation

Community & Student Voices, Systemic Insights Board-Led Chats on Educational Equity and Well-Being

Submitted for Board Consideration – April 16, 2025

Presented by: Carmen Xiomara Urbina, Chief of Staff

As part of the Eugene School District 4J Board of Directors' commitment to inclusive governance and community-centered leadership, each Board member organized a series of informal "Chats" with students, families, educators, and community partners during the 2024–25 school year. These small-group conversations were intentionally designed to foster trust, center lived experience, and create space for authentic dialogue.

This report offers a high-level summary of common themes that emerged across these conversations. It does not include formal recommendations, but instead serves as a reflection tool to support the Board's continued learning, listening, and strategic alignment. A more in-depth review of these insights will take place during the Board's Summer 2025 Retreat.

Emerging Systemic Themes

The themes outlined below reflect **areas of opportunity**—where continued reflection, collaboration, and shared action may strengthen equity, access, and student well-being across the district:

- 1. Grief and Postvention Support**

Community members highlighted the importance of having compassionate, coordinated responses when students experience loss. Opportunities exist to clarify and communicate district-wide protocols.

2. **Inclusion and Belonging for Students with Disabilities and Neurodivergent Identities**
Many shared a desire to deepen efforts that support meaningful inclusion, peer connection, and dignity for students receiving SPED or 504 services.
3. **Staffing Continuity and Professional Learning in Special Education**
Participants pointed to the need for consistent staffing and collaborative planning time, especially between general and special education teams.
4. **Clarity and Implementation of IEPs and 504 Plans**
Families expressed interest in improved communication, stronger follow-through, and clearer roles among team members supporting students.
5. **Communication and Family Engagement**
Some families noted challenges in navigating systems and identifying key contacts. Strengthening two-way communication and cultural responsiveness was a recurring request.
6. **Youth Mental Health and Wellness**
Students and families emphasized the importance of timely access to mental health supports, grief care, and coordination with external providers.
7. **District–Charter School Collaboration**
Families from charter schools shared a desire for continued collaboration and greater transparency around shared services, supports, and communication.
8. **Curriculum, Identity, and Student Belonging**
Participants expressed curiosity about how curriculum reflects the district’s values and how topics like civic learning and inclusion are addressed across grade levels.
9. **Visibility and Opportunity for ECCO and EOA**
Students in alternative settings voiced a desire for increased visibility, access to academic pathways, and support in preparing for college and career transitions.
10. **Student-Centered Communication**
Students consistently asked for more transparent, accessible communication—via platforms they already use—to stay informed and engaged.

This report reflects a snapshot in time and is part of the district’s ongoing effort to listen and learn alongside its community. The insights shared during these Board-led Chats offer valuable guidance as the district works to ensure every student and family experiences a sense of belonging, partnership, and purpose.

The Board will return to these themes during its Summer 2025 Retreat, supporting deeper reflection and alignment with the district’s strategic priorities.

Community and Student Voices, Systemic Insights



Presented by: Community Engagement Board Subcommittee
April 16, 2025

Board Members:

Ericka Thessen
Rick Hamilton
Maya Rabasa

Systemic Insights

Board-Led Chats on Educational Equity and Well-Being

STUDENT CHATS



Board Members Speaking to Community Members in the Eugene School District 4J



Executive Summary

This summary provides the context for our Chats, which were rooted in trust-building and authentic connection.

These were not formal hearings, but rather heartfelt conversations.

- **Fall/Winter 2024–25:** Board members hosted “Chats” with students, families, staff, and community partners.
- **Purpose:** To build trust, uplift community voices, and deepen understanding.
- These conversations focused on shared strengths, identified systemic patterns, and explored collective hopes and aspirations.

Disclaimer–Grounding the Chats – What They Are and Are Not

- The chats were an opportunity for the Board to listen and learn from participants' lived experiences.
- Board members attended solely to listen—not to debate, recommend, or resolve challenges.
- The participants were invited, the chats were not public meetings and do not represent a broad spectrum of views from across populations in our community.
- As the chats were not public meetings, they cannot serve as guidance or recommendations to the Board or 4J staff.
- Conversations centered around the essential question: "What are your dreams for you as a ²¹⁵ student or your children in Eugene School District 4J?"
- Input from the Chats will be shared as patterns and themes, without names attached, information shared, may inform individual Board Director reflections and decisions, but they do not serve to provide guidance or recommendations to the Board as a whole.



Student Voices – Overview

- Student listening sessions were held across all high schools, ECCO, EOA, and IHS.
- Over 70 students participated, representing diverse identities and experiences.
- Students named key needs for inclusion, access, and partnership.
- This section summarizes systemic themes and student-generated solutions.

Student Voices – Systemic Patterns

- **Belonging & Identity:** Desire for safe, affirming environments and inclusive curriculum.
- **Facilities & Safety:** Need for clean, gender-inclusive, and monitored restrooms.
- **Mental Health:** Access to consistent, trauma-informed mental health care.
- **Academic Access:** Equity in AP, IB, CTE, electives, and postsecondary guidance.
- **Communication:** Direct, timely updates through familiar platforms.
- **SPED/Neurodivergent Support:** Consistent services and inclusive classroom practices.
- **Visibility:** Recognition and equitable support for ECCO and EOA students.



Student Voices – What They Asked For

- A Student Advisory Jamboree to connect peers districtwide.
- Expanded affinity spaces with consistent adult support.
- Inclusive curriculum starting in elementary school.
- Culturally responsive counselors and mental health staff.
- Transparent, student-centered communication.
- Voice in hiring—especially principals.
- Equity in Honors, SAT prep, electives, and CTE.
- Facilities investment in ECCO, EOA, and alternative programs.

Community Voices – Overview

- Community conversations were held across the district with families, educators, healthcare providers, and charter school partners.
- Board members “held space” for Chats to build relationships and learn from lived experiences.
- This section summarizes systemic themes and strengths identified by adults in the 4J community.

Community Voices – Strengths and Aspirations

- Commitment to student well-being and mental health support.
- Aspiration for inclusive, affirming, and accessible learning environments.
- Strong desire for meaningful partnership and communication with schools.
- Enthusiasm for civic engagement, purposeful curriculum, and student-centered learning.
- Recognition of dedicated staff and a call for continued investment in their training and collaboration.

Community Voices – Systemic Patterns

- **Grief & Postvention:** Desire for clear, compassionate district-wide grief protocols.
- **Inclusion for Students with Disabilities:** Need for equity in access and culturally responsive supports.
- **Staffing Stability & Training:** Emphasis on collaboration time and trauma-informed practices.
- **IEP/504 Plan Implementation:** Call for consistency, accountability, and family partnership.
- **Family Communication:** Hope for culturally responsive, proactive communication strategies.
- **Youth Mental Health:** Deep concern and appreciation for existing wellness supports.
- **Charter Partnerships:** Requests for clarity, collaboration, and equitable resourcing.
- **Curriculum & Belonging:** Interest in learning that reflects identity, values, and civic readiness.

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Closing Summary

- Across diverse voices, common themes emerged.
- Deep commitment to healing, inclusion, and partnership.
- Gaps in support, communication, and coordination remain.
- The district is rich with promise and collective will to grow.

Moving Forward

- This report is a reflection tool—not a set of recommendations.
- Summer 2025 Board Retreat will revisit these themes.
- An opportunity to align around shared values and respond to both student and community voices.

222



Moving Forward

- For students, we will be sending a thank-you message along with a summary of what was shared across the four comprehensive high schools, ECCO, EOA, and IHS.
- Principals will also receive a summary report and a communication packet specific to their school or program for reflection and next steps.
- This report is a reflection tool—not a set of recommendations.

Gratitude

- Thank you to families, educators, students, and partners.
- Your stories, courage, and hopes remain central to this work.
- We move forward together—with humility and purpose.



Community Voices, Systemic Insights

Board-Led Chats on Educational Equity and Well-Being

Submitted for Board Consideration – April 16, 2025



Presented by: Carmen Xiomara Urbina, Chief of Staff

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Executive Summary

Centering Community Voice: Insights from Board-Led Conversations

Eugene School District 4J – Fall/Winter 2024–25

As part of their ongoing commitment to inclusive and equity-centered governance, members of the Eugene School District 4J Board of Directors created intentional opportunities to connect with students, families, educators, and community partners through small-group “Chats” held across the district during the 2024–25 school year.

These relational gatherings were rooted in trust-building and sought to uplift lived experiences, cultivate transparency, and deepen understanding. Rather than formal hearings, the Chats offered a space for shared storytelling and mutual learning. Each Board member selected the communities they would engage, ensuring a wide spectrum of voices and experiences were reflected.

This report offers a high-level summary of common themes that emerged across these conversations. Framed through an asset-based lens, the report not only surfaces systemic challenges but also lifts up the values, commitments, and collective strengths that define the 4J community.

Strengths and Shared Aspirations Identified:

- **Deep Commitment to Student Well-being:** Families and staff consistently voiced care for student’s emotional, academic, and social growth, naming mental health supports, school-based counselors, and wellness centers as critical and valued.
- **Desire for Inclusion and Belonging:** Across all groups, there was a clear aspiration to create more inclusive, affirming, and accessible learning environments—especially for students with disabilities, neurodivergent learners, and marginalized groups.
- **Partnership and Communication:** Families expressed a strong desire to be in meaningful partnership with schools—calling for clearer communication, earlier engagement, and proactive relationship-building.
- **Civic Engagement and Purposeful Curriculum:** Participants showed enthusiasm for a curriculum that prepares students for life—socially, civically, and professionally—and emphasized the importance of student voice, choice, and identity-affirming education.
- **Recognition of Dedicated Staff:** Many conversations celebrated the hard work and heart of 4J educators, especially those supporting students with complex needs, and called for sustained

investment in their training, collaboration, and support.

Systemic Patterns that Emerged:

Across all Chats, community members expressed a deep commitment to student well-being, inclusion, and partnership. The following themes reflect shared strengths and opportunities for growth:

- **Grief and Postvention Support:** A desire for compassionate, consistent responses to student and community loss.
- **Inclusion and Access:** A call to expand opportunities and belonging for students with disabilities across classrooms and programs.
- **Staffing and Training:** Recognition of staff dedication, alongside the need for more stable staffing, collaboration time, and consistent professional learning.
- **IEP/504 Implementation:** Strong plans are in place, and families hope for greater follow-through, clarity, and accountability.
- **Family Communication:** Families seek more transparent, culturally responsive, and proactive communication from schools.
- **Youth Mental Health:** Communities are concerned about rising student anxiety and deeply value school-based wellness supports.
- **Charter Collaboration:** Charter families voiced a desire for stronger partnership and clarity in district relationships.
- **Curriculum and Belonging:** There is a shared interest in a curriculum that reflects students' identities and prepares them for engaged civic life.

Moving Forward

This report is not a list of conclusions or recommendations. Rather, it is a reflection tool—an invitation to pause, listen, and plan. It centers the wisdom and experiences shared by our community and offers a springboard for deeper Board reflection during the Summer 2025 Retreat.

The Eugene School District 4J is rich with potential: a passionate community, resilient students, committed educators, and engaged families. This moment is an opportunity to align around shared values,

strengthen what's working, and collectively address what needs repair.

With heartfelt appreciation to all who contributed their time, stories, and hopes for a stronger, more inclusive 4J.

Purpose of the Report

In alignment with their ongoing commitment to equity, transparency, and inclusive engagement, members of the Eugene School District 4J Board of Directors created intentional opportunities to listen, learn, and build deeper connections with community members across the district.

Throughout the fall and winter of the 2024–25 school year, each Board member thoughtfully selected specific communities, organizations, or groups to engage through small-group conversations known as “Chats.” These gatherings were not formal listening sessions or public hearings, but instead relationship-based spaces where stories, experiences, and hopes could be shared openly. The aim was to center the voices of those most closely connected to Eugene School District 4J and to foster trust and mutual understanding.

This report provides a high-level summary of the themes and insights that emerged from those engagements. While it does not offer formal recommendations, it is intended as a reflection tool—one that invites deeper dialogue, alignment, and continued growth. The Board will revisit and expand upon these themes during their Summer 2025 Retreat as part of a broader effort to strengthen systemwide learning and planning.

We acknowledge that this report represents just one snapshot in time. The process of listening must remain ongoing to ensure all voices—especially those who have been historically unheard or marginalized—are meaningfully reflected in the district’s decisions moving forward.

Overview of Engagement

Across these Chats, Board members engaged with a wide cross-section of individuals including families, educators, charter school leaders, healthcare professionals, and valued community partners. While the exact focus of each conversation varied, shared themes consistently rose to the surface—pointing to both common strengths and challenges across the district.

These conversations highlighted the care, commitment, and resilience within our schools and communities. They also underscored opportunities for more consistent practices, clearer communication, and stronger alignment in how we serve all students and families.

Emerging Patterns

Across all engagements, participants shared concerns that extended beyond any one school or program. What follows is a summary of the recurring systemic patterns lifted up by multiple voices—each one pointing to areas where reflection, clarity, and collaboration can help us grow together.

Key Systemic Patterns Identified

1. Gaps in Postvention and Grief Response Protocols

- Across the district, there is a deep desire to respond with compassion and dignity when a student or close loved one passes away. At the same time, schools and families would benefit from a clearer, district-wide approach that supports healing and honors those affected.
- Many schools are making meaningful efforts to acknowledge loss and support students and staff, though these efforts vary. A more consistent framework would help elevate and align these thoughtful practices across the district.
- Communities have expressed interest in flexible, culturally responsive ways to honor students and loved ones. Strengthening clarity around honorary diplomas and memorial practices offers an opportunity to reflect shared values and meet families with care.

2. Inclusion and Belonging for Students with Disabilities and Neurodivergence

- Families and educators are deeply committed to ensuring that students receiving special education services have full access to enriching opportunities. There is a shared aspiration to expand equitable access to electives, extracurriculars, and inclusive peer experiences across all schools.
- Conversations across the district reflect a growing recognition that inclusion must go beyond logistics—it should center dignity, connection, and a true sense of belonging for every student.
- Many school communities are actively working to support student behavior and emotional regulation. At the same time, there is an opportunity to revisit compliance-based approaches (such as PBIS and star charts) to ensure they reflect trauma-informed, strengths-based practices that honor the needs of neurodivergent students.

3. Staffing Continuity and Training in Special Education

- Across the district, educators and staff are working with dedication to support students with diverse needs. However, high turnover and the frequent use of substitutes can disrupt continuity of care, creating opportunities to strengthen stability and retention in key support roles.
- There is strong interest among both General Education and Special Education staff in working collaboratively to support inclusive practices. Increasing dedicated time for shared planning and coordination would build on this commitment and enhance student support.
- Many educators and educational assistants bring deep care and commitment to their roles. To build on this foundation, staff have expressed a desire for more consistent training in trauma-informed practices, co-regulation strategies, and the implementation of accommodations to better meet student needs.

4. Implementation Gaps in IEP and 504 Plans

- Many schools have developed thoughtful and well-crafted IEPs and behavior plans that reflect deep care for students. Ensuring consistent implementation across settings presents an opportunity to clarify roles, strengthen oversight, and reinforce shared accountability.
- Families bring a wealth of insight and advocacy to their children’s educational journeys. Strengthening systems of partnership and support can help ensure families feel supported, rather than solely responsible for navigating complex processes.
- Educational assistants play a vital and trusted role in the day-to-day experience of students with disabilities. Creating intentional pathways for their inclusion in planning and decision-making meetings would honor their expertise and strengthen team collaboration.

5. Communication and Partnership with Families

- Families across the district expressed a strong desire to be active partners in their children’s education. Clarifying points of contact and expectations around follow-up presents an opportunity to strengthen trust and streamline support.
- Many families emphasized the value of relationship-building—especially during key transitions or before challenges occur. Proactive outreach and early connection can reinforce the sense of care and partnership that families seek from their school communities.
- There is a clear call for communication that is not only transparent but also culturally responsive and reciprocal. Families want to feel heard, understood, and respected, and many shared a hope for two-way communication that reflects the diversity and strengths of the 4J community.

6. Youth Mental Health and the Whole Child

- Families, educators, and healthcare providers are united in their deep concern for students’ emotional well-being. Many have noticed rising levels of anxiety, depression, social isolation, and the lingering impact of screen time and pandemic-related disruption. This shared concern reflects a strong commitment to the whole child and opens the door for collective solutions.
- There is broad recognition of the importance of mental health supports, and many participants noted the need for better alignment between school-based services and external medical or therapeutic providers. Strengthening those connections could lead to more coordinated and responsive care for students and families.
- School-based counselors, health centers, and enrichment activities were consistently lifted up as valuable assets in supporting students’ well-being. Expanding equitable access to these supports offers a powerful opportunity to build on what’s already working and ensure more students benefit.

7. Equity of Access and Representation in Charter Partnerships

- Charter school families expressed a strong desire to feel more connected to districtwide conversations and supports. Their engagement reflects a clear commitment to partnership and a

willingness to work collaboratively for the benefit of all students.

- Families and staff voiced ongoing questions about how funding and services are shared between the district and charter schools. Addressing this confusion presents an opportunity to increase transparency and build mutual understanding.
- There is a deep interest in cultivating stronger relationships between charter schools and the district—relationships that honor the distinct strengths of each school and create space for shared learning, innovation, and collaboration.

8. Broader Curriculum, Civic Engagement, and Student Belonging

- Community members voiced a strong interest in understanding how civic education, social-emotional learning (SEL), and career and technical education (CTE) are prioritized across the district. Their questions reflect a shared commitment to preparing students for engaged citizenship, emotional well-being, and future success.
- Families and students care deeply about school environments where every young person feels seen, safe, and valued. Concerns around bullying, identity, and belonging signal a powerful call to ensure that these values are woven consistently into learning experiences across all grade levels.
- There is a collective desire to see the district’s values more clearly reflected in curriculum and instruction. Community members expressed hope for a learning environment that is not only academically rigorous but also purpose-driven and grounded in equity, inclusion, and belonging.

Closing Summary

Each conversation brought a distinct tone and perspective, yet across the diverse voices and experiences shared, clear themes emerged that reflect common hopes, challenges, and opportunities across our schools and programs.

- Across the district, there is a shared commitment to supporting students and families through times of loss. Strengthening grief response and postvention protocols offers an opportunity to ensure consistent, compassionate care across school communities.
- Families and educators continue to champion inclusive practices, even as access and implementation of special education services vary across settings. Aligning these efforts can help fulfill the promise of equity and belonging for every learner.
- Staff and school teams are working hard to meet the needs of students. At the same time, staffing shortages, limited training, and collaboration gaps present real challenges to providing consistent, high-quality support.

- Families are eager to be valued partners in their children’s education. Addressing communication barriers and increasing transparency can build stronger bridges of trust and shared purpose.
- The desire for connection extends beyond schools. Deepening alignment between school-based supports and broader healthcare or community services would better serve students’ holistic needs.
- Across all settings—including charter schools—there is a longing for greater equity, recognition, and collaboration. Addressing structural and cultural barriers can help ensure that every school and every student is fully seen, supported, and celebrated.

These patterns are not final answers—they are openings for deeper reflection, honest dialogue, and purposeful growth. They serve as an invitation to move forward together, grounded in the voices and values of our community.

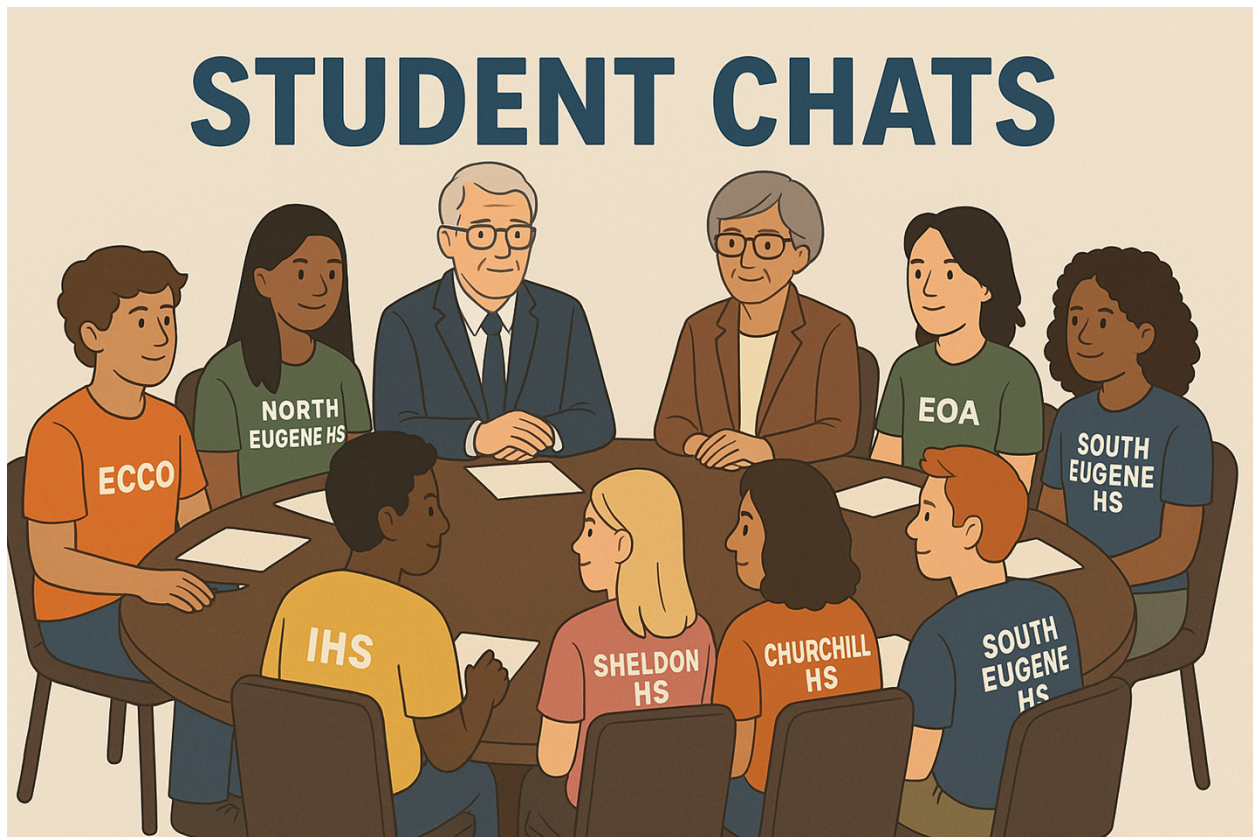
The next step in this journey will take place during the Board’s Summer 2025 Retreat, where these themes will guide collective reflection and help shape long-term district priorities and governance.

This report is shared with deep gratitude to the families, educators, partners, and professionals who gave their time, stories, and trust. Your voices remain at the heart of this work—and we thank you for your courage, your clarity, and your hope for what is possible.

Student Voices, Systemic Insights

Board-Led Chats on Educational Equity and Well-Being

Submitted for Board Consideration – April 16, 2025



Presented by: Carmen Xiomara Urbina, Chief of Staff

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Executive Summary

Student Voices, Systemic Insights

Board-Led Chats on Educational Equity and Well-Being

Submitted for Board Consideration – April 16, 2025

Presented by: Carmen Xiomara Urbina, Chief of Staff

As part of Eugene School District 4J’s commitment to inclusive governance and student-centered leadership, Board members conducted student listening sessions at every high school, ECCO, EOA, and IHS during the 2024–25 school year. These student “Chats” were intentionally informal and designed to center student voice, elevate diverse experiences, and create space for honest dialogue.

Over 70 students participated, representing a cross-section of 4J’s student population—including ASB leaders, affinity group members, students in AP/IB, AVID, CTE, and students with IEPs, 504 plans, and multilingual or alternative education backgrounds.

While each school had unique dynamics, common districtwide themes emerged that reflect systemic barriers to inclusion, equity, and well-being:

Key Patterns Identified

Students across 4J shared thoughtful, courageous reflections on what they need to thrive. Their voices consistently pointed to a desire for safe, inclusive, and engaging learning environments—where they are affirmed, supported, and heard.

Key themes that emerged include:

- **Belonging & Identity:** Students want schools that affirm their identities and actively address racism, transphobia, and exclusion. Affinity spaces are seen as critical supports, but they need stronger adult investment.
- **Safety & Dignity in School Facilities:** Restrooms were described as unsafe or unsanitary in many schools. Students see improved access, hygiene, and monitoring as essential to their daily well-being.
- **Mental Health & Grief Support:** Students called for trauma-informed, proactive mental health care and clear grief response protocols. They value wellness supports but noted gaps in consistency and access.
- **Academic Access & Pathways:** Barriers to AP, IB, CTE, and electives—particularly for students in alternative programs—were frequently raised. Students want equitable access and clearer guidance.

- **Communication:** Students want to be informed directly through platforms they use—like Canvas, newsletters, and student-led journalism. They’re asking for more responsive, student-centered communication.
- **Support for SPED & Neurodivergent Students:** Students highlighted the importance of compassionate staff and inclusive classrooms, and shared that services can be inconsistent, especially with staffing disruptions.
- **Visibility for ECCO & EOA:** Students from ECCO and EOA expressed pride in their schools, but also shared that they often feel overlooked. They are asking for equitable resources, improved facilities, and broader recognition.

These reflections underscore students’ commitment to shaping schools where every learner can belong, grow, and be heard.

Students across the district expressed a strong desire to be engaged partners in shaping their educational experience. Their requests reflect a commitment to inclusion, equity, and shared leadership:

- **Opportunities to Connect Across Schools:** Students envision a districtwide Student Advisory Jamboree to build community and collaboration.
- **Support for Clubs & Affinity Groups:** They want meaningful investment in identity-affirming spaces at all school levels.
- **Inclusive Curriculum:** Students are asking for curriculum that reflects diverse identities and lived experiences, starting in elementary school.
- **Dignified Facilities:** Clean, safe, and gender-inclusive restrooms remain a top priority.
- **Wellness & College Support:** Students emphasized the need for more counselors, college prep, and access to SAT testing.
- **Transparent Communication:** They want timely, student-centered information—delivered directly.
- **Voice in Hiring:** Students want meaningful roles in hiring decisions, especially for school leaders.
- **Equity in Academic Access:** Ensuring all students have access to advanced courses and electives, no matter their campus, is essential.
- **Recognition of Alternative Programs:** Students from ECCO and EOA are asking for visibility, investment, and access equal to their peers in comprehensive high schools.

Their vision reflects a district where every student is connected, empowered, and supported.

Closing Reflection

These student-led conversations lifted up powerful insights. Their voices call us to reflect—not react—and to respond with integrity and care.

This report does not offer quick fixes. It invites sustained attention, accountability, and leadership rooted in equity. The Board will revisit these themes during the Summer 2025 Retreat as part of broader strategic alignment.

With deep appreciation to the students who led the way—you reminded us what true leadership looks like. Now, it's our responsibility to listen, reflect, and act.

Purpose of the Report

As part of the Eugene School District 4J Board of Directors’ continued commitment to inclusive governance and student-centered leadership, Board members facilitated a series of student listening sessions during the 2024–25 school year.

Each Board member participated in site-based “Chats” at all four comprehensive high schools, ECCO, Eugene Online Academy (EOA), and International High School (IHS). These small-group conversations were intentionally informal and designed to center student voice, reflect the diversity of student experience, and create space for honest dialogue with minimal adult facilitation.

This report summarizes the systemic themes, recurring barriers, and student-generated insights that surfaced across these engagements. It is not a list of recommendations, but a tool to support reflection, shared accountability, and future planning. A deeper discussion of this report will take place at the Board’s Summer 2025 Retreat, as part of a broader effort to uplift student voice and align district priorities with lived experience.

It is important to note that this report represents a snapshot—not a comprehensive or exhaustive accounting of all student experiences in 4J. Continued and cyclical listening will remain essential to ensure equity and responsiveness.

Overview of Engagement

Sites Visited:

- Churchill High School
- Sheldon High School
- South Eugene High School
- North Eugene High School
- Eugene Online Academy (EOA)
- Early College and Career Options (ECCO)
- International High School (IHS)

Participants: Over 70 students representing a cross-section of the student body, including:

- ASB and student leaders
- Affinity group members
- Students with IEPs, 504 plans, and neurodivergent identities
- Students enrolled in AP/IB, AVID, and CTE pathways

- Student parents, multilingual learners, and students in alternative or online settings

Emerging Patterns

While each school setting was unique, students consistently surfaced themes that point to districtwide barriers. These patterns speak to the need for systemic alignment, stronger communication, and sustained investment in inclusion, access, and well-being.

Key Systemic Patterns Identified

1. Belonging, Identity, and Inclusion

Students shared a clear and heartfelt desire to feel seen, safe, and affirmed in every school. Affinity groups were named as essential sources of belonging, yet many lack consistent staffing and resources—especially at the elementary and middle school levels.

They called attention to experiences of racism, homophobia, and transphobia that often go unaddressed, particularly in the absence of regular staff. In response, students are asking for identity-affirming curriculum, culturally responsive adults, and districtwide expectations that promote true inclusion.

“We need a curriculum that teaches us to walk in each other’s shoes—not just MLK in January.”

2. Bathroom Safety and Campus Conditions

Students voiced a strong desire for restrooms that are clean, safe, and accessible to all. They identified restrooms as a key area where dignity, supervision, and basic needs must be better addressed—especially for girls, nonbinary, and trans students.

Common concerns included overcrowding, lack of hygiene products, limited access to gender-neutral options, and minimal adult presence. In some cases, students shared that they avoid using restrooms altogether during the school day.

These reflections point to a clear opportunity to ensure that all students have access to respectful, well-maintained spaces that support their health and well-being.

3. Mental Health, Grief, and Support Services

Students spoke openly about the emotional impact of anxiety, grief, and post-pandemic stress—often compounded by social pressures and screen time. Their reflections highlight a strong need for consistent, proactive mental health supports.

While students deeply value trusted counselors, wellness rooms, and programs like AVID, they noted that access to care is often limited to moments of crisis. Grief support protocols are unclear, and many students feel left to navigate loss on their own.

Their insights reflect both appreciation for existing supports and a shared hope for a more responsive, trauma-informed system that centers student wellness every day.

“We only get help if we’re drowning. What about before that?”

4. Academic Access, Electives, and Equity Across Pathways

Students expressed a strong desire for equitable access to engaging, rigorous academic opportunities—regardless of school site or program. They named disparities in access to electives, CTE, AP, and Honors courses, particularly for students at IHS, ECCO, and EOA.

Scheduling conflicts, limited visibility of programs, and the loss of free SAT/PSAT testing were identified as barriers. Students called for earlier exposure to career pathways, more elective choices, and opportunities to access courses across school sites.

Their reflections underscore a shared commitment to academic excellence, opportunity, and preparation for the future.

“I found out about CTE from a poster—but I couldn’t take it at my school.”

5. Communication and Responsiveness

Students shared that they often learn about important updates secondhand—or not at all—and are eager for more direct, consistent communication from their schools.

They proposed solutions such as a centralized dashboard through Canvas, regular updates on schedules and policies, and stronger advisory programs with relevant content. There was also strong interest in reviving student journalism and expanding peer-led communication.

These requests reflect students' desire to be informed, engaged, and trusted as partners in their school communities.

"We don't need more posters. We need someone to actually talk to us."

6. Inclusion and Support for Neurodivergent and SPED Students

Students receiving special education and 504 supports shared a deep desire for systems that truly reflect their needs and strengths. They named delays in evaluation, inconsistent implementation, and a lack of student voice in decision-making as ongoing challenges.

They emphasized the importance of accommodations being honored consistently—especially by substitutes—and called for educational assistants to be meaningfully included in team planning. Students expressed a need to move beyond tokenism and outdated behavioral models.

Their requests reflect a call for faster, more responsive systems, stronger training for all staff, and leadership that uplifts neurodivergent voices and experiences.

7. Visibility and Equity for Alternative Schools

Students from ECCO and Eugene Online Academy (EOA) spoke with clarity, honesty, and pride about their learning communities. They deeply value the flexibility, support, and pathways these schools provide—but also shared that ECCO and EOA are often misunderstood, stigmatized, or treated as “less than” traditional high schools.

Students described experiences of invisibility and isolation, including exclusion from districtwide recognition, leadership roles, and access to programs and services available at other schools. They shared that ECCO and EOA are often seen as “last resorts” rather than valid, intentional choices—and this perception has real consequences for how they are resourced and supported.

Despite these challenges, students offered a hopeful and practical vision for change. They asked for a districtwide reframe of ECCO and EOA as powerful, innovative, and fully legitimate learning spaces. They want equitable access to CTE programs, AP courses, college counseling, and extracurriculars that enrich their experience and future pathways.

Students also called for dedicated staff who understand and celebrate their unique programs, upgraded facilities that reflect pride and investment, and inclusive communication that ensures ECCO and EOA students are fully seen and valued across the district.

“When I finally got to ECCO, I felt human again. But it was treated like a punishment to get here.”

What Students Asked For

Students across the district shared bold, thoughtful ideas about how to make schools more inclusive, connected, and empowering. Their requests reflect not only what’s missing—but also what they believe is possible when their voices are heard and valued.

- **Connection Across Schools:** Students are asking for a districtwide Student Advisory Jamboree or town hall—an opportunity to build unity, share experiences, and collaborate with peers beyond their own campuses.
- **Support for Clubs & Affinity Spaces:** They want to see identity-affirming clubs and affinity groups available at every level, with consistent adult sponsorship and funding to help them thrive.
- **Accessible, Culturally Responsive Counselors:** Students named the critical role counselors play in their success and well-being. They emphasized the need for more counselors who reflect and understand the diversity of their lived experiences—and who are consistently available across all schools.
- **Inclusive Curriculum:** From elementary through high school, students want curriculum that represents diverse histories, cultures, and identities. They’re asking for classrooms where every student can see themselves reflected in what they learn.
- **Safe and Dignified Facilities:** The importance of clean, safe, and well-monitored restrooms came up repeatedly. Students see these basic needs as essential to dignity, safety, and belonging.
- **Transparent, Student-Facing Communication:** Students want to receive timely updates—about schedules, policies, and opportunities—directly through familiar platforms like Canvas, school newsletters, and student-led media.
- **Representation Across Roles:** They are calling for a more diverse, inclusive staff across all buildings and roles, including educators, counselors, and leadership.
- **A Voice in Leadership Decisions:** Students expressed a clear interest in participating in hiring processes, particularly when it comes to selecting school principals.
- **Academic Equity Across Campuses:** They want Honors courses, SAT prep, electives, and CTE opportunities restored and made available at every school—not just some.
- **Recognition for ECCO and EOA:** Finally, students from ECCO and EOA asked the district to move beyond marginalization and see their schools as full, valued parts of the 4J system—deserving of investment, recognition, and pride.

Together, these requests form a hopeful and grounded blueprint for a more inclusive, student-centered district—one where every learner feels seen, supported, and heard.

Closing Summary

The voices of our students—thoughtful, bold, and deeply rooted in lived experience—offer a clear and hopeful vision for the future of Eugene School District 4J. Through these Board-led Chats, students did more than identify barriers. They painted a picture of what is possible when schools are grounded in belonging, guided by equity, and led with partnership.

Students across our comprehensive high schools, ECCO, EOA, and IHS shared not only what needs to change, but also what they love about their schools and what they want to see strengthened. They asked us to listen—not just to their words, but to the values behind them: dignity, representation, access, safety, and connection.

From calls for cleaner restrooms to inclusive curriculum, from a desire to participate in hiring to the need for student-centered mental health supports, their insights reveal both systemic gaps and the immense potential within our schools. They reminded us that equity isn't just about correcting deficits—it's about recognizing and nurturing the strengths that already exist within our students, staff, and communities.

This report is not the end of the conversation—it is a beginning. It is an invitation to move beyond good intentions and take thoughtful, sustained action. The themes shared here will guide the Board's continued learning and reflection at the Summer 2025 Retreat and beyond, shaping future priorities in partnership with the very students who inspired them.

With deep appreciation to the young leaders who shared their stories, their truths, and their dreams: you are helping shape a district where every student belongs, every voice matters, and every future is possible.

Let us rise to meet that vision—together.



Eugene School District 4J
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ITEM FOR ACTION

Date of Meeting

April 16, 2025

Title

Approval of Integrated Guidance (IG) 25-27 Biennium Plan

Presenters

Larry Williams, Assistant Superintendent of Instruction
Judy Jesiah, State & Federal Grant Manager-IG

Background

The Integrated Guidance (IG) 25-27 Biennium Plan was originally presented as an Item for *Action at a Future Meeting* at the (linked) [March 05, 2025 Regular 4J School Board Meeting](#).

The Integrated Programs 2025-27 Application for Eugene SD and 5 charters (Coburg, Ridgeline, Village, Network, and Twin Rivers) is now presented for Board Approval as an Item for Action, with the opportunity for public comment provided at both the March 05, 2025 and the April 16, 2025 4J School Board Meetings.



ITEM FOR ACTION

Date of Meeting

April 16, 2025

Title

K-10 Core Mathematics Curriculum Adoption

Presenters

Erin Gaston, Elementary Curriculum Administrator
Courtney Leonard, Secondary Curriculum Administrator

Background

This item was originally presented as an Item for Action at a Future Meeting, at the March 5, 2025 4J School Board of Directors Meeting.

OARs Chapter 581, Division 22 standards requires us to review our curricular materials in core subject areas every 7 years and either maintain or adopt curriculum so teachers can provide up-to-date instruction that aligns with the current standards. In mathematics, K-5 last adopted LearnZillion in 2017 as a temporary curriculum to support the Common Core State Standards. We conducted an open source adoption to align our curriculum to the updated Oregon standards until the next adoption cycle. In 2013, Superintendent Shelly Berman directed middle and high schools to implement CPM (College Preparatory Math). In later years, teachers were allowed to use open source curriculum such as Illustrative Mathematics (IM) in conjunction with or in place of CPM.

Currently, some teachers in our district are using the adopted and/or approved core instructional materials while others primarily teach from non-adopted materials. At this time, we are unable to say what percentage of students are receiving instruction that is aligned to state standards and is grounded in high quality instructional materials. Additionally, our OSAS scores have shown a general downward trend for the past 10 years. The table below details our proficiency rates for the 2023-24 school year.

	3rd	4th	5th	6th	7th	8th	11th
2014-15 % Proficient	53%	47%	46%				
2023-24 % Proficient	42%	40%	40%	31%	33%	34%	33%

Our goal in this adoption cycle was, for the first time, to bring together an adoption team that represented grades K through 10 to align in our vision of math instruction and select materials that not only align to the vision, but provide a cohesive experience for our students across their K-10 experience. The adoption team was composed of 80 team members representing all grade levels from K-10, every school, and varying levels of teaching experience and background. We also included representatives from special education, Title, ELD, instructional coaches, equity managers, building administrators, and our mentor team during our initial kick-off and curriculum review process.

Best practices in mathematics education demands the district provide high-quality, culturally inclusive instructional materials for teachers that emphasize three shifts in math standards: focus, coherence, and rigor. Equitable access to comprehensive math instruction across our K-12 schools aligns with our district's values of prioritizing educational equity.

After a rigorous review and following the current [Board ARs](#) for Core Instructional Materials adoption, each of our pilot teams have come to consensus and recommends the district approve the purchasing of the following materials to be used in all K-10 math classrooms:

- *Bridges* in Mathematics for elementary
- *MidSchoolMath* for middle school
- *Open Up* for 9th and 10th grade Algebra and Geometry and Algebra II

Additionally, our special education team underwent a supplemental adoption process to identify math intervention materials for use in our special education classroom. The team engaged in a similar adoption process including reviewing curriculum using an evaluation tool, engaging constituents in opportunities for input and feedback, and coming to consensus on the best materials to meet students' needs. As a result of that process, and independent of the core adoption process, the team selected Bridges Intervention for elementary and Supporting Ongoing Achievement Responsibly in Mathematics (SOAR) for secondary. We are excited about the opportunity for students to receive interventions closely aligned to the general education curriculum.

We will purchase the program as soon as possible to have materials barcoded and in classrooms before staff return in the fall of 2025, as well as ensure materials are available for community viewing.

Options and Alternatives

Without the purchase of an aligned, comprehensive math curriculum, 4J will be out of compliance with Division 22 standards. Without a viable, aligned, updated math curriculum teachers will continue using materials from unverified organizations, which means students continue to receive a disjointed and inconsistent math experience. The alternative to purchasing math curriculum is to maintain the status quo which would mean teachers would no longer have access to core curricular materials and would continue to use self-selected resources.

Which students, and how many, are served by this project?

For this 7-year contract with *Bridges*, *MidSchoolMath*, and *OpenUp*, each of our 15,000 students will have access to high quality math instructional materials. Each of our special education students at all levels and students receiving math intervention in middle and high school will be served by the purchase of math intervention curriculum.

Budget/Resource Implications:

The cost for these materials are represented in the table below. These costs represent the 7 year costs including teacher guides, manipulatives, workbooks, access to online resources, publisher professional learning costs, and storage for materials. The total recommendation to approve is \$3,791,161 to purchase K-10 math curriculum and interventions over the course of the next 7 years.

Material Description	Amount
K-5 Materials (Workbooks, Teacher guides, tech licenses, classroom kits)	\$1,583,245
6-8 Materials (Workbooks, teacher guides, tech licenses)	\$1,007,070
9-10 Materials (Workbooks, teacher guides, tech licenses)	\$962,346
6-12 Publisher PD Package	\$61,700
Special Education Intervention Materials	\$176,800
Total	\$3,791,161

Recommendation

The Superintendent recommends the approval of \$3,791,161 for purchasing Bridges Mathematics, MidSchool Math, and OpenUp Mathematics for use in general education classrooms and Bridges Intervention and SOAR math intervention materials for use in special education and intervention classes.



ITEM FOR ACTION AT A FUTURE MEETING

Date of Meeting

April 16, 2025

Title

Approve Adoption of Middle and High School Science Curriculum

Presenter

Sarah Kirby, Secondary Science Context Specialist (TOSA)
Courtney Leonard, Secondary Curriculum + MTSS Administrator

Background

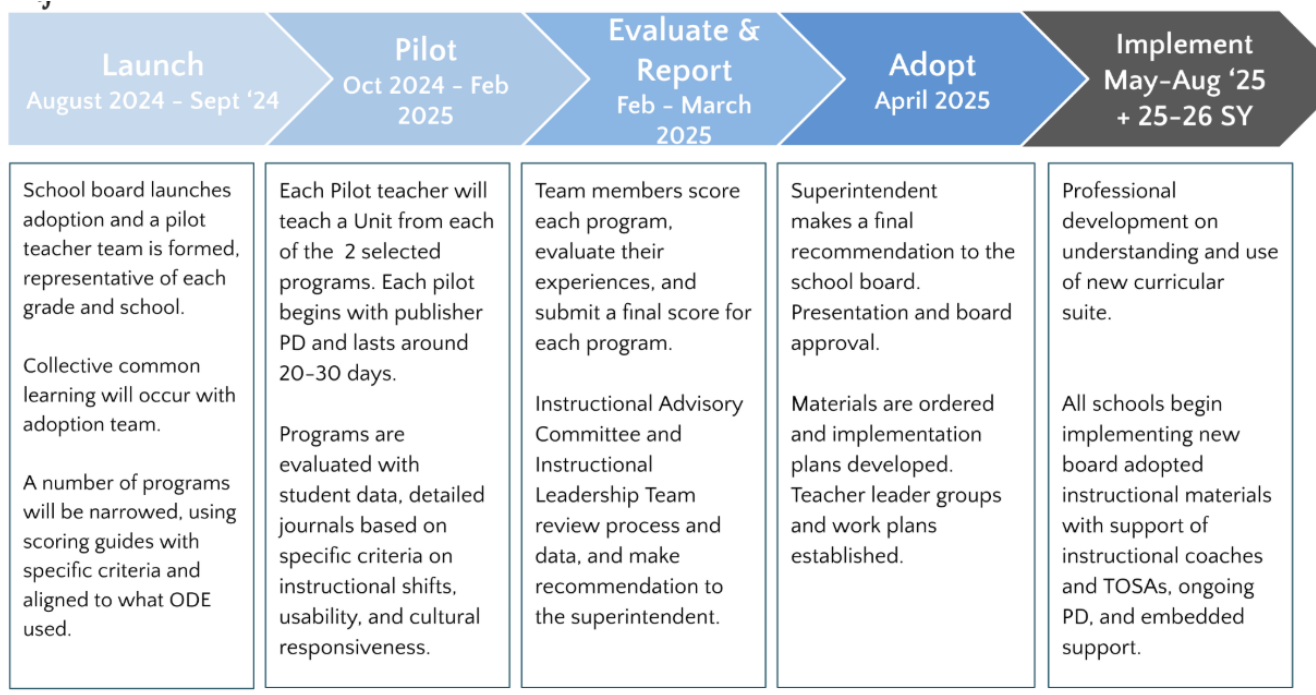
In 2022, the Oregon Department of Education adopted updated K-12 Science standards. ODE's adoption cycle required new science materials to be in classrooms by fall of 2024. Eugene 4J applied for, and was granted, a two-year postponement. The secondary science team has completed the curriculum adoption process and will seek to provide new materials for use in classrooms in fall of 2025. Elementary will complete their adoption next year with materials in classrooms in fall of 2026.

Our current science curricula were adopted during the 2015-16 school year: FOSS at elementary, IQWST at middle school, and HMH, CPO, and Pearson for high school science courses (Physics, Chemistry and Biology). The curriculum suites we currently have are outdated and do not adequately meet the needs of all students, particularly those who have been historically underserved in our systems. In addition, they do not align to the most updated NGSS standards that were adopted by ODE in 2022.

Therefore, we launched a curriculum adoption in August 2024, focusing on high-quality guaranteed and viable instructional materials across our secondary schools to increase alignment with our district values of prioritizing equitable access and inclusion. Over the course of our pilot and consensus, teacher teams chose a suite of materials that are aligned with Next Generation Science Standards (NGSS-National) as well as Oregon State Science Standards, and that are aligned to research and best practices.

Our work with pilot teams were guided by the following essential questions:

- What is our vision for an equitable and rigorous science education for 4J students?
- How can we ensure adopted materials meet the needs of each student, inclusive of students historically underrepresented and underserved?
- What are the NGSS instructional routines and practices we value and what are the curricular and instructional shifts we need to make?
- How can the adopted curriculum support those practices?



Which students, and how many, are served by this curriculum adoption?

All secondary students will have access to the new curriculum in grades 6-11 and beyond, approximately 8400 students.

Options and Alternatives

If we do not adopt new science materials, we would need to significantly modify current materials, purchase supplemental materials, and retrain teachers.

Budget/Resource Implications

Resources were allocated for the adoption and pilot teams to conduct the curriculum adoption process this school year, including bond funds marked for curriculum adoption. Curriculum purchases totals are:

7 Year Materials Costs



Material Description	Amount
Middle School materials– digital licences, lab supplies, workbooks, teacher guides, etc.	\$770K
High School materials– digital licences, lab supplies, workbooks, teacher guides, etc.	\$1.42 million
Supplemental curricula including IB, AP, CN + science electives	\$25K
Total	\$2.2 million

Which students, and how many, are served by this project?

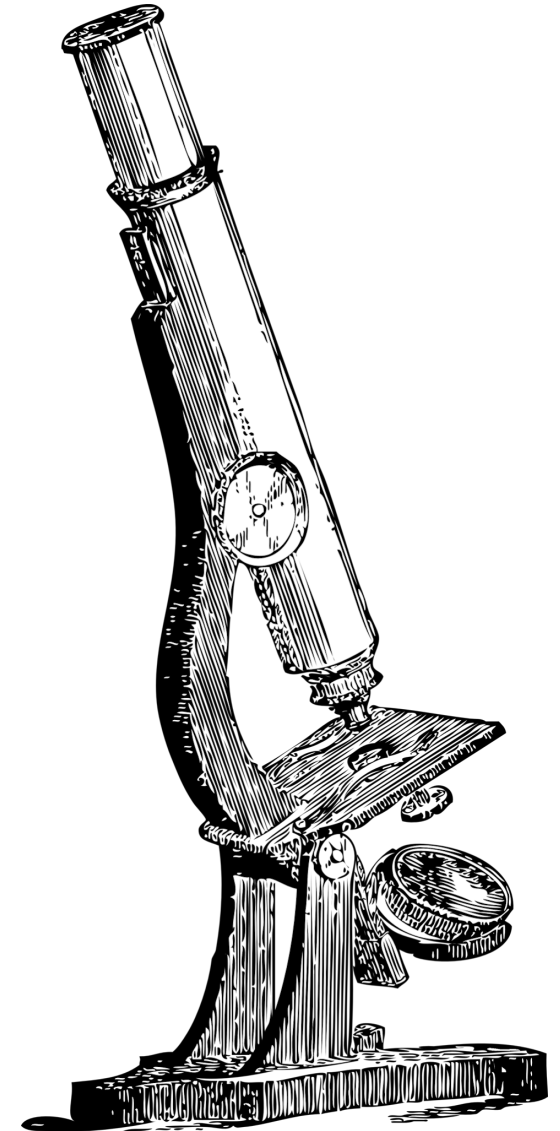
For 7-year contracts with Twig and Savvas, each of our approximately 8400 secondary students will have access to high quality science instructional materials.

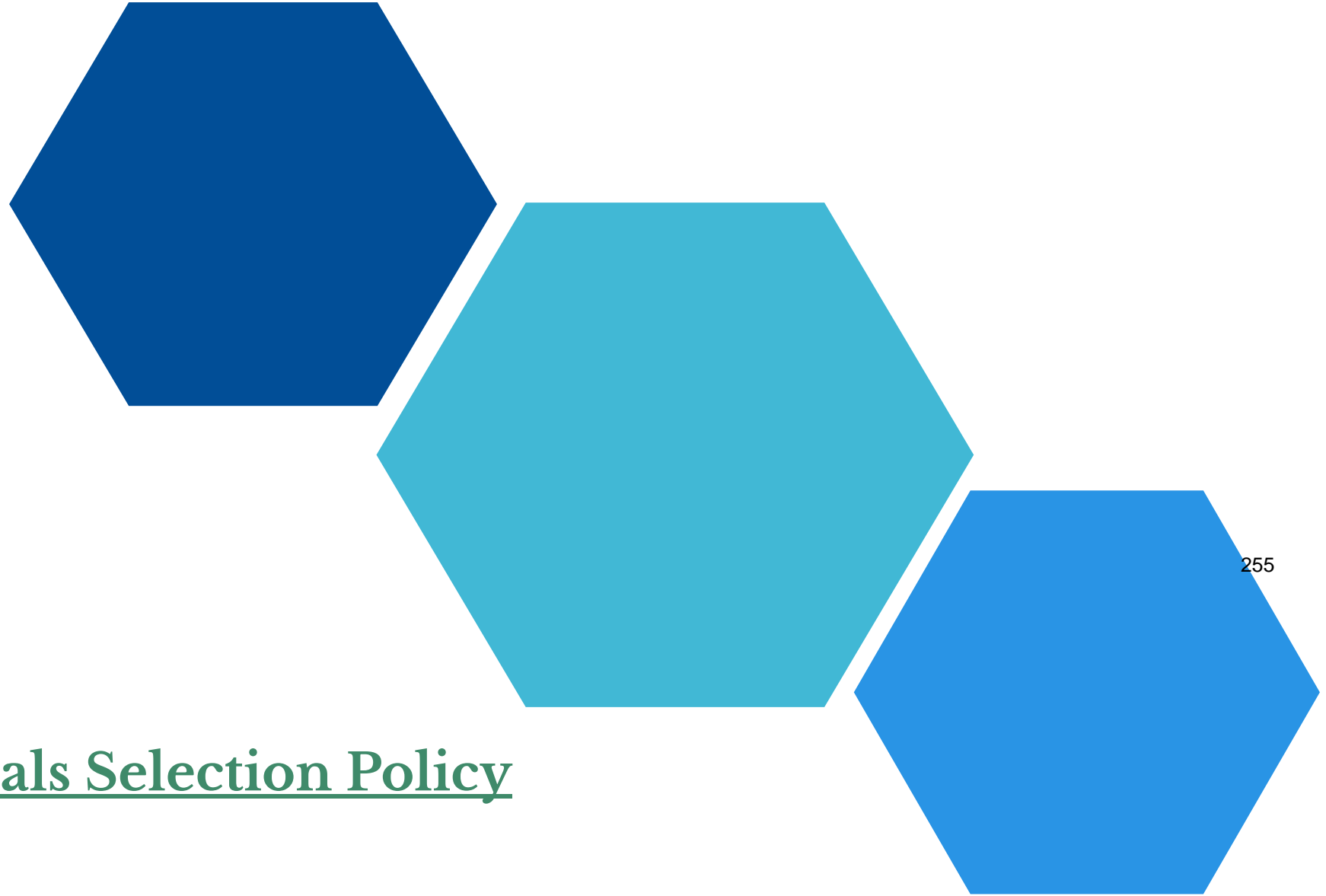
Recommendation

The Superintendent recommends the approval of funds to purchase Twig Science Middle School and Savvas for Physics, Biology and Chemistry for use in general education classrooms beginning in the 2025-26 school year.

Adoption Process Review: Secondary Science Curriculum

Instructional Advisory Council: Thursday, April 3, 2025
Instructional Cabinet: Tuesday, April 8, 2025
Board Item for Future Action: Wednesday, April 16, 2025





IIA-AR

Instructional Materials Selection Policy

Instructional Materials Selection Process

Adoption of Instructional Materials in Core Subject Areas:

- Launch, Pilot, Evaluation & Report, Adopt and Implementation
- ODE has a 7-year adoption cycle for core instructional Materials

Adoption of Instructional Materials in Non-Core Subject Areas and Supplemental Materials

- Launch & Evaluate, Report, Adopt and Implementation
- Instructional materials in any program or subject area for which there are counterparts at other schools

Non-Adopted Instructional Materials Process

- This process is appropriate for selecting and approving:
 - Instructional materials in any program or subject area for which there are no counterparts at other schools
 - Must include principal approval, inform parents, must include input from site council
 - If the material is to be use at multiple schools, the superintendent or designee will initiate either the core or non-core subject area adoption cvcle

Instructional Materials Selection Process Cont.

Teacher-Selected Additional Instructional Materials

Teacher-selected additional materials for student use:

- Must align to district criteria for the selection of instructional materials, described in this rule;
- Must be used within legal copyright limits and publisher licensing agreements;
- Shall be carefully previewed by the teacher to ensure the instructional value is appropriate to student age level and classroom subject matter; and
- Must fit the scope, sequence and objectives of the course and align to standards.

IIA-AR: Secondary Science Instructional Materials Selection: Process Document, Internal Calendar, Adoption Process Slides

IIA-AR: Secondary Science Instructional Materials Selection Process Document
August 2024 - May 2025

Objective
To undergo the adoption process for secondary science curriculum for implementation during the 2025-2026 school year. These curricular materials will be aligned to ODE standards, both secondary science content standards and standards for secondary science practice, as well as secondary science education research.

The work of the adoption team will be framed and guided by the following essential questions:

- What is our vision for an equitable and rigorous science education for 4J students, grades K-12?
- How can we ensure adopted materials meet the needs of each student, inclusive of students historically underrepresented and underserved?
- What are the NGSS instructional routines and practices we value as a district + what are the curricular and instructional shifts we need to make?
- How can the adopted curriculum support those practices?

Team:
Process Facilitators: Sarah Kirby, Secondary Science Specialist (TOSA) + Courtney Leonard, Secondary Curriculum Administrator
Lead Administrators: Courtney Leonard, Secondary Curriculum Administrator
Teacher Lead (Science): Sarah Kirby, Secondary Science Specialist (TOSA)
External Team Advisors: Dustin Dawson, Science Specialist from Lane ESD
Adoption & Pilot Team: The team is composed of one to two secondary science teachers per school. In addition to classroom teachers, SPED, Title, ELD, and Instructional Technology representatives were asked to participate. The anticipated team size is 20-25 staff members.

Adoption team members will pilot materials during the fall and winter, 2024-2025.

Funding Sources:
 2024 - 2025 School Year: Pilot materials compiled and purchased
 2024 - 2025 School Year: Purchase of MS/HS Curricular Materials
 2025 - 2026 School Year: Implementation Year 1 - Professional Development from Publisher

Expenditures:
 2025-26 Curriculum Budget Projections |

Process Document

Calendar for 2024-2026
Elem_Secondary_Science_Adoption/Pilot Calendar
[2024-25 Science Adoption Process Overview Schedule](#)
[Linear Timeline](#)
 K-5 Office Hours Link: Google Meet joining info: <https://meet.google.com/tfh-knsp-gah>
 6-12 Office Hours Link: Google Meet joining info: <https://meet.google.com/nvy-dzed-oqp>

Jump to: [October](#) | [November](#) | [December](#) | [January](#) | [February](#) | [March](#) | [April](#) | [May](#) | [June](#) |

September 2024					
	Monday	Tuesday	Wednesday	Thursday	Friday
	2 Labor Day No School	3 Teacher Planning Day	4 First Day K, 6, 9	5 First Day All	6
	9	10	11	12	13

Internal Calendar

Secondary
4J SCIENCE ADOPTION
 2024-2025
 Calendar

Kick-Off Resources this Calendar

Sept

Oct 10/2 10/5 10/18

Nov

Dec

Jan

Feb

Adoption Process Slide Deck

Why Curriculum Matters



“ [Curriculum] can be a doorway to big, bold change. It's an opportunity to ease our way into rewiring how school systems operate, enabling them to learn, adapt, evolve, and dismantle systemic inequities in a rapidly transforming world. The need for good instructional materials is both intuitive and anchored in research. **Curriculum is the key resource in the instructional core that sets expectations, elaborates those expectations in tasks, and supports student learning.**

–from “Curriculum: Not Your Average Silver Bullet” by Chu & Gurny (2023) shared by Columbia University

”

259

“ The design of curriculum, which also includes students' texts and tasks, shapes pedagogy, and pedagogy affects how a student experiences school... **A high-quality curriculum includes lessons that empower students and develop their critical thinking and communication skills. A high-quality curriculum creates a classroom culture that nurtures students' leadership, agency, and ownership of their learning and encourages critical analysis of the world.** Such curriculum gives us a way to put **equity** into action day in and day out.

–from “High-Quality Curriculum Is a Transformation Tool for Equity” by Hartl & Riley (2021) shared by ASCD

”

COMMON PITFALLS

Based on interviews, we found five common pitfalls in the curriculum journey:

1. **“Nobody asked me.”**

Leaders are engaged in curriculum adoption, but teachers are left out – leading teachers to feel like the decision is forced on them and their students.

2. **“You are telling me to do different things.”**

Teachers are on board and excited, but leaders are not engaged in the process and don’t understand the materials, so they end up undermining the materials by giving feedback in tension with the curriculum’s design, creating mixed signals about what matters most.

3. **“I feel like a robot.”**

Teachers are asked to be so strict in their fidelity to the curriculum that they cannot meet students’ needs, students struggle, and ultimately everyone rejects the materials.

4. **“I use it as a resource.”**

Without training or a specific plan for how the materials should be used, teachers’ well-intentioned adaptations get out of hand and dilute the materials, so students don’t end up mastering the standards.

5. **“This too shall pass.”**

The whole curriculum implementation effort is treated as another exercise in compliance rather than rooted to a meaningful vision for teaching and learning.

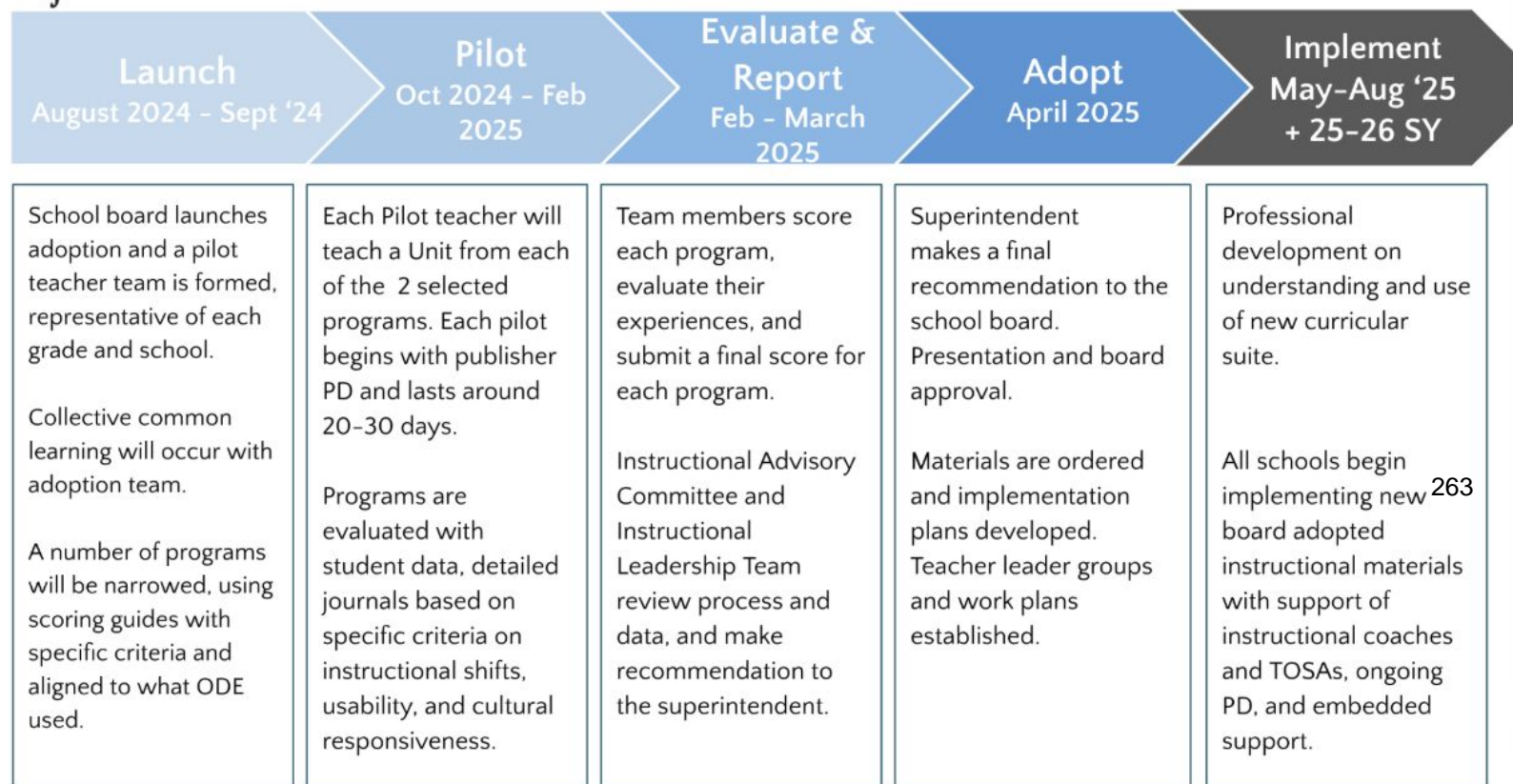
Step 1: Launch

The Board launches the adoption process.
A team is formed that receives training, elicits input and establishes a vision with aligned criteria.

Our Adoption Team

- Sarah Kirby- Secondary Science Content Specialist / TOSA
- Maggie Frassetto-Cline- Elementary Science Content Specialist/TOSA
- Courtney Leonard - Secondary Curriculum Administrator
- Over 25 teachers, administrators, and other specialists–
– representative of a cross-section constituent groups
- Participation and support from LaneESD

Our Charge



Budgeting Process, 2024-25 and Beyond

<i>Adoption Phase</i>	<i>Costs Associated with Each Phase</i>
Launch	Extended contract for pilot team to meet, plan, review
Pilot	Extended contract for materials review Classroom walk-throughs + lesson alignment
Evaluate + Report	Extended contract for materials evaluation + feedback
Adopt	Materials purchase after Board approval
Implement	Extended contract for professional learning and supports

Vision of the Science Framework

Goal: To create a science program where race, zip code, income, gender and other demographic categories do not predict educational opportunities and career outcomes.

By 12th grade all students have appreciation of the beauty and wonder of science; possess sufficient knowledge of science and engineering to engage in public discussions on related issues; are careful consumers of scientific and technological information related to their everyday lives; are able to continue to learn about science outside school; and have the skills to enter careers of their choice, including (but not limited to) careers in science, engineering, and technology.

265

A Framework for K–12 Science Education



4J Shared Science Vision

1. ****Joy and Appreciation of Science****
 - Fostering curiosity and a love for the natural world.
2. ****Inclusivity and Community****
 - Creating welcoming environments where all students feel valued.
3. ****Rigorous Critical Thinking & Problem-Solving****
 - Developing skills for real-world challenges and discussions.
4. ****Career Readiness and Science Literacy****
 - Preparing students for diverse career paths and post-secondary success.
5. ****Engaging Learning Experiences****
 - Providing relevant, memorable education that inspires lifelong learning.

Step 1A: Results from Review Process

Review materials and select curriculum to pilot.

Oregon IMET

Instructional Materials Evaluation Tool

Oregon Instructional Materials in Science - Contract Years 2024-2031											
Category	Oregon Adoption Criteria	Publisher	Program Title & Score Sheets	Copyright Date	Price List	Available in Spanish and/or other languages	1.1 Alignment to 3D Learning	1.2 Science Phenomena & Engineering Design-Based Engagement	1.3 Learning Progressions & Coherent Storylines	2.1 Engagement & Motivation	2.2 Culturally Responsive Instructional Support
Category 2: Grades 6-8	MEETS*	Activate Learning	Activate Learning's OpenSciEd Middle School**	2020	Price List	Yes	2	2	2	2	2
Category 2: Grades 6-8	MEETS*	Carolina Biological Supply Company	Carolina Biological Supply Company's OpenSciEd Middle ** Science Textbook for Oregon 6-8	2022	Price List	Yes	2	2	2	2	2
Category 2: Grades 6-8	MEETS*	Discovery Education	HMH Into Science Middle School	2024	Price List	Yes	2	2	2	2	2
Category 2: Grades 6-8	MEETS*	Houghton Mifflin Harcourt	Kendall Hunt's OpenSciEd Middle School**	2022	Price List	Yes	2	2	2	2	2
Category 2: Grades 6-8	MEETS*	Kendall Hunt	Issues and Science by Lab Aids - Middle School	2020	Price List	Yes	2	2	2	2	2
Category 2: Grades 6-8	MEETS*	Lab Aids	Stile Digital - Middle School	2023	Price List	Yes	2	2	2	2	1
Category 2: Grades 6-8	MEETS*	Stile Education	Twig Education (Imagine Learning)	2022	Price List	Yes	2	2	2	2	2
Category 2: Grades 6-8	MEETS*	Twig Education (Imagine Learning)	Integrated - Twig Science Oregon Middle School	2022	Price List	TBD	2	2	2	2	2
Category 3: Grades 9-12	MEETS*	Accelerate Learning Inc	STEMscopes High School	2023	Price List	Yes	2	2	2	2	2
Category 3: Grades 9-12	MEETS*	Houghton Mifflin Harcourt	HMH Science Dimensions	2018 & 2020	Price List	Yes	2	2	1	2	1
Category 3: Grades 9-12	MEETS*	McGraw Hill	Inspire Science High School	2020	Price List	Yes	2	2	2	2	1
Category 3: Grades 9-12	MEETS*	Savvas	Savvas High School Science (Environmental Science, Chemistry, Physics, Biology)	2019, 2021, 2022	Price List	Yes	2	2	2	2	1
	Scored independently by teachers across the state	Patterns	Patterns Independent Adoption Review		Price List	Yes	2	2	2	2	2
		OpenSciEd	OpenSciEd Independent Adoption Review		Variable depending on "publisher"	Yes	2	2	2	2	2

Oregon IMET Publisher Review Sheet

Criteria for Narrowing Curricula (for Pilot)

Rubrics with Focused Look-fors (1-4)

- *Multi-language learner supports*
- *Differentiation*
- *Student engagement*
- *Assessments*

STEMscopes™ <small>THE LEADER IN STEM EDUCATION</small>	1. Multiple Language/Language Supports (HS)		
STEMscopes NGSS 3D Online URL: https://login.acceleratelearning.com/?to=n11093d171441 User ID: <i>eugeneschooldistrict4j</i> Password: <i>Science24</i>	Are the Curricular Materials Available in Multiple Languages (1-3)?	What Languages Are Available?	Evidence, Availability and Accessibility?
Rubric: For each indicator, give a score between 1 and 3: 1. = No 2. = Partially (if applicable) 3. =Yes			
			269

Step 2. Pilot

The materials are piloted and examined using established criteria and data collected.

Curriculum Selected to

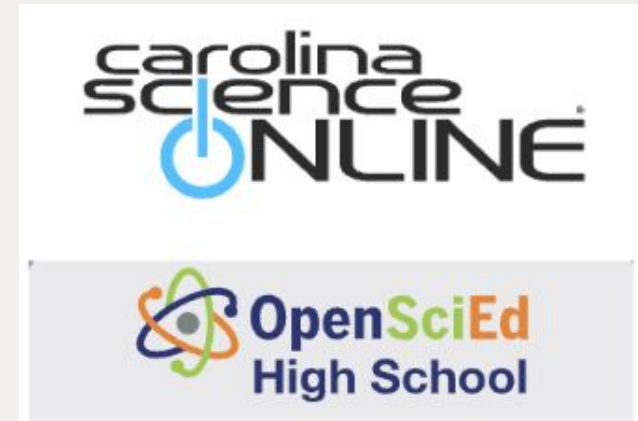
Pilot

**Grades
6-8**



**Grades
9-12**

(Physics, Biology, Chemistry)



Oregon IMET Evaluation Tools

The 4J Oregon IMET Tool was developed by Lake Oswego School District and adapted by Eugene 4J to be a concise and comprehensive tool based on the Oregon IMET established by Oregon Dept of Education.

OR Science Baseline Criteria

1.1 Alignment to Three-Dimensional Learning

Materials clearly teach the Standards. Instruction focuses on the **discipline of science and engineering practices, crosscutting concepts** within and across levels.

Vocabulary: *Key words or phrases*
Look Fors: *Where would you find it? What would you need? Focus on your classroom? What would you need? Focus on your classroom?*

1: 3-D Integration

- Consistent and explicit (easy to find)
- DCI, SEP, CCC
- Grade-level/band

→ Multiple opportunities for students to meet grade-level and/or grade-band standards by instruction
and
→ Every lesson has a core idea (DCI), a way to and makes a connection (CCC)

2: Nature of Science

- explicitly aligned
- intersection
- nature of science
- DCI, SEP, CCC

Look for **both**

Nature of Science by doing **Science and Engineering Practices**

Scientific Investigations Use a Variety of Methods	Scientific Knowledge is Based on Empirical Evidence	Scientific Knowledge is Open to Revision in Light of New Evidence
--	---	---

Nature of Science builds connections using **Crosscutting Concepts**

Science is a Way of Knowing	Scientific Knowledge Assumes an Order and Consistency in Natural Systems	Science is a Human Endeavor
-----------------------------	--	-----------------------------

What are students doing to learn science & how do they make connections?



4J Secondary Science IMET Scoring Sheet

Please input your scores after evaluating the Curricular materials

* Indicates required question

Email *

Your answer _____

Your Name *

Your answer _____

2024 Science IMET Scorecard

Publisher: _____

Part 1: OR Science Baseline Criteria	Scores 0-2				Totals
1.1 Alignment to Three-Dimensional Learning /6				X	
1.2 Science Phenomena & Engineering Design-Based Engagement /6				X	
1.3 Learning Progressions & Coherent Storylines /6				X	
<i>input total in Google Form</i> → Part 1 Total /18					
Part 2: Student Engagement & Cultural Pedagogy	Scores 0-2				Totals
Student Engagement & Motivation /6				X	
Culturally Responsive Instructional Support /6				X	
<i>input total in Google Form</i> → Part 2 Total /12					
Part 3: Technical Usability	Scores 0-2				Totals
Resources for Teachers /8					272
Scheduled lesson breakpoints (40-55 minutes 2X week) /2		X	X	X	
Completion of units is possible with shorter time periods /2		X	X	X	
Ageable preparation of materials /2		X	X	X	
Resources for Students /8					

Materials Pilot Timeline



December

Pilot #1 begins the week of December 2nd. The pilot period will run for 6 weeks total (3 weeks before and after winter break).



Feb-March

Pilot #2 begins week of February 2nd, runs for six weeks, and wraps up the week of March 17 (the week before spring break). with review and scoring.



November

Pilot and Co-Pilot teachers are trained by first publishers, and plan collaboratively to prepare for Pilot #1 launch in December.



January

Pilot #1 continues, through January 22nd, with review and scoring. Pilot # 2 training will occur the week of January 15 in anticipation of next unit. January 31: end of term grading.



April - May

Final review and analysis by Piloting team, and recommendation to school board to secure funding. Order materials and begin Professional Learning.



Students Surveyed

Pilot #1	MS - Stile 587 Students	HS - OpenSciEd 401 Students	Pilot #1 TOTAL 988 Students
Pilot #2	MS - TWIG 554 Students	HS - Savvas 168 Students	Pilot #2 TOTAL 722 Students
TOTALS	Total MS Student Surveys 1,141	Total HS Student Surveys 569	Total Student Surveys 1,710

Pilot Tools- Participant and Community Feedback Tools

At the conclusion of each unit, pilot teachers distributed surveys to students and families.

Surveys were available in both paper and digital formats.



4J Secondary Science Adoption Questions and Feedback / Preguntas y comentarios sobre la adopción del currículo ciencia de secundaria del 4J

This form serves as a two-way communication channel. Stakeholders are able to share questions and feedback about the adoption process or curricular materials and receive responses or support. Como un canal de comunicación de dos vías, los interesados pueden hacer preguntas y comentarios sobre el proceso de adopción o los materiales curriculares y recibir respuestas o apoyo del personal de apoyo.



Student Survey - 4J Secondary Science Curriculum Pilot

Reflecting on this last unit, please provide feedback on the activities, labs and materials used. Reflexionando en esta última unidad, por favor proporcione comentarios sobre las actividades, los laboratorios y los materiales utilizados.



Family Survey - 4J Science (6-12) Curriculum Pilot/ Encuesta familiar: Piloto del Currículo de Ciencias (6-12) del 4J

Reflecting on this last unit, please provide feedback on your student's experience with the curricular materials. Reflexionando en esta última unidad, por favor proporcione comentarios sobre la experiencia de su estudiante con los materiales curriculares.

Note: If you have children in more than one pilot classroom at different grade levels, please complete one survey for each as they will have experienced different units. / Reflexionando en la última unidad, por favor comente sobre la experiencia de su estudiante con los materiales curriculares. Nota: Si tiene niños en más de un salón de clases piloto en diferentes niveles de grado, complete una encuesta para cada uno de ellos, ya que habrán experimentado unidades diferentes.

Subject Area Class * 275

Looking at Data (s

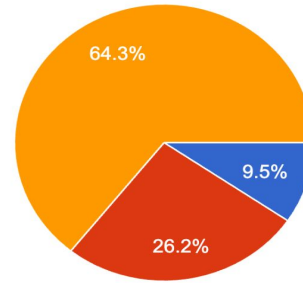
At the conclusion of each unit, pilot teachers distributed surveys to students and families.

Surveys were available in both paper and digital formats.

[Link to Results Slides](#)

The materials and assignments in this unit were...

168 responses



- Too Easy
- Too Hard
- Just Right

HS Pilot #2 (Savvas)



QUESTIONS AND FEEDBACK /
comentarios sobre la adop
currículo ciencia de secund

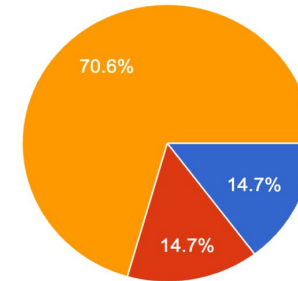
This form serves as a two-way communication channel. St
share questions and feedback about the adoption proces
and receive responses or sup
como un canal de comunicaci
preguntas y comentarios sobr
recibir respuestas o apoyo del



Family Surv

The materials and assignments in this unit were...

557 responses



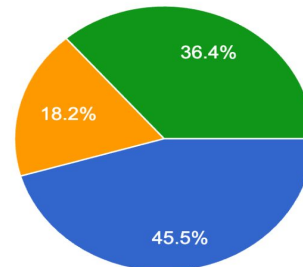
- Too Easy
- Too Hard
- Just Right

276

MS Pilot #2 (TWIG)

What grade level is your child in?/¿En qué grado está su hijo?

11 responses



- 6
- 7
- 8
- 9 Physics/ Física
- 10 Biology/Biología
- 11 Chemistry/Química
- Other (High School)/ Otro de preparatoria

Family Pilot #2

Step 3. Evaluate and Report

The data is evaluated, materials are ranked and a report is submitted to the instructional advisory council.

Overview of Selection Process



The Review Team reviewed all data collected throughout the pilot and reflected on the alignment of materials to the 4J Science Vision.

Following, the team reached consensus on a curriculum to recommend for adoption.



Consensus Process



- Review Curriculum using Instructional Materials Evaluation Tool (IMET)
- Compare data from both pilot curricula in preparation
- Select one curriculum program to recommend for adoption next year.

- High School Reached Consensus (**Savvas**)
- Middle School Reached Consensus (**Twig**)

Curriculum Review Team. Recommendations

Middle School



High School

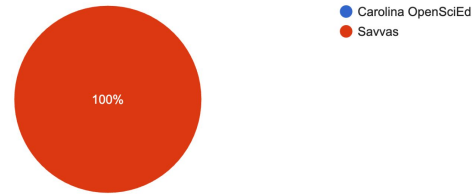




March 19 + 31: Consensus Meeting + Process

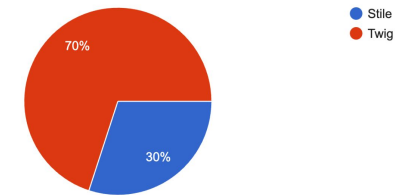
High School Final Consensus

Based on the data review and team discussion, which curriculum do you recommend?
6 responses

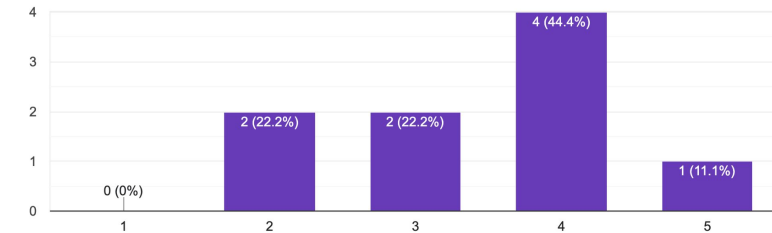


Middle School Final Consensus

Based on the data review and team discussion, which curriculum do you recommend?
10 responses



To what degree do you support the decision to recommend Twig to the board for adoption?
9 responses



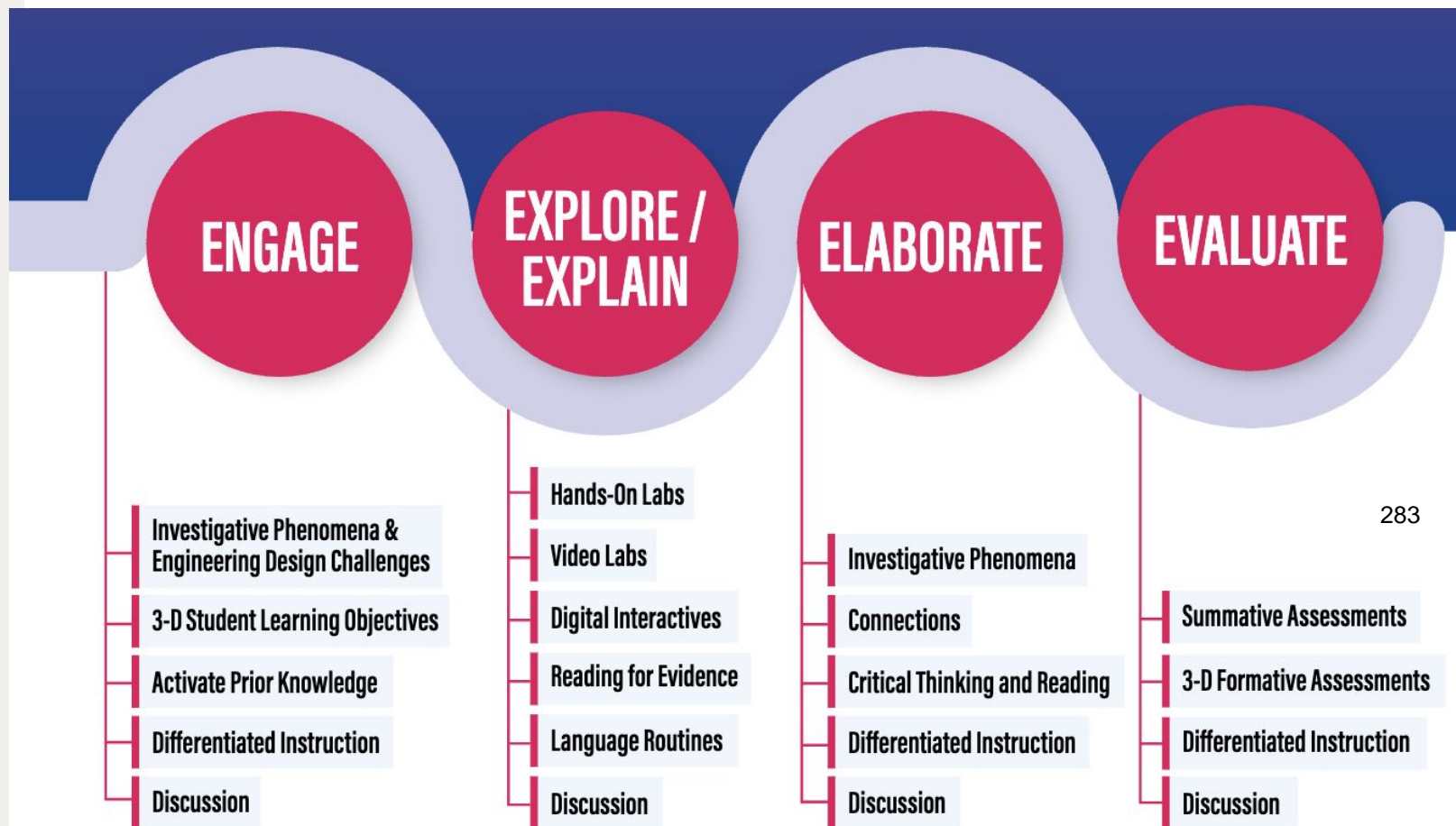
Step 4. Adopt

The superintendent makes an adoption recommendation to the Board.

Notable Features Twig

[Twig Science Middle School](#) is based on an inquiry-driven instructional model and a 5E lesson design to engage and motivate your students through active learning.

Following the 5Es instructional model...students construct, demonstrate, and reflect on their understanding of the three dimensions of the module Performance Expectations.



Notable Features Savvas

Physics, Biology, Chemistry

Students investigate real, compelling phenomena that fuels questions about everyday life and the thrill of discovery.

SAVVAS
LEARNING COMPANY

Experience a high school curriculum based on doing science!

Miller & Levine Biology

See life in a whole new way!

Phenomena drives student learning throughout every lesson in *Miller & Levine Biology*. Students focus on solving problems and developing solutions through productive struggle. They investigate phenomena through Problem-Based Learning Projects, Authentic Case Studies, Virtual Lab Simulations, and engaging hands-on and virtual inquiry activities! See page 16.

Also available
in Spanish!

PROBLEM: How can you reduce the impact of an invasive species on your local ecosystem?

» TO SOLVE THIS PROBLEM, perform these activities as they come up in the unit and record your findings in your Explorer's Journal.



Experience Chemistry®

Meet *Experience Chemistry*®—an exciting, innovative way to teach chemistry. Thought-provoking phenomena engage students and learning is based on doing science.

This new program implements a learning model that:

- Organizes learning around phenomena, giving students an authentic, real-world experience.
- Immerses students in the doing of science with a variety of hands-on and digital activities designed to reach every learner.
- Partners with Flinn Scientific® to deliver high-quality inquiry labs, virtual reality, and performance assessments.

See page 34.

Experience Physics®

Students best learn science when they DO science. That's why *Experience Physics*® puts the focus on the student experience. This modern program implements a learning model that organizes learning around phenomena giving students an authentic, real-world experience. *Experience Physics* includes a variety of hands-on and digital activities designed to reach every learner, and partners with Flinn Scientific to deliver high-quality inquiry labs, engineering workbenches, and performance assessments. See page 40.



Step 5: Implement

Schools will implement the materials with professional development and evaluation opportunities.

Implementation Needs



As part of our consensus process, secondary teachers shared a need for a clear and cohesive plan. We will establish an implementation team that represents all grade levels, subjects and multiple viewpoints to create an initial implementation plan and a three-year plan.

Priorities for this team includes:

- Developing a **plan for collaborative planning and unit internalization**, including identifying times and opportunities within our contract for structured **time with colleagues** both within buildings and across the district.
- Planning **strong professional learning prior to implementation** and time to become familiar with the materials, routines, and resources before using them with students.
- Developing a **year one plan that supports teachers in implementing the materials** in manageable chunks, including guidance on where to prioritize instructional time in the first month and the first year
- Establish clear guidelines + expectations for implementation across buildings and levels to ensure integrity and accountability

Cost of Curriculum and Supplemental Materials

287

7 Year Materials Costs



Material Description	Amount
Middle School materials– digital licences, lab supplies, workbooks, teacher guides, etc.	\$770K
High School materials– digital licences, lab supplies, workbooks, teacher guides, etc.	\$1.42 million
Supplemental curricula including IB, AP, CN + science electives	\$25K
Total	\$2.2 million

Year 1 Curriculum Implementation Budget



Professional Development	Amount
1-½ Publisher Training days (April/August for 71 teachers)	April 2025: \$45,440 August 2025: \$45,440
Science Teacher Leaders (30 teachers meeting monthly on implementation progress/needs)	\$50,000
Unit/Lesson Internalization (Sub release for 71 teachers to engage in internalization protocols)	\$46,860
MS + HS Publisher Training Package	TBA: Est. \$20,000
Total	\$175,800.00

Year 2+ Professional Learning Costs



Professional Development	Amount
1 professional learning day for new educators (Buyback for 10 teachers at beginning of year)	\$5000
Science Teacher Leaders (30 teachers meeting monthly on implementation progress/needs)	\$50,000
Learning Walks/Observations (Sub release for 70 teachers to engage in observations + deeper learning)	\$60000
Total	\$115,000

Consensus from IAC

Did the instructional materials adoption process for secondary science follow the required steps, policy and rules?

All Thumbs UP - 10 members (plus Sarah and Courtney - 12 Total)

Next Steps & Future Meetings

The information shared here will go to Instructional Cabinet on April 8. They will then recommend moving the adoption process forward to the Superintendent.

Instructional Cabinet:	Tuesday, April 8, 2025
Board Presentation:	Wednesday, April 16, 2025
Board Approval:	Wednesday, April 23, 2025
Purchase of Materials:	End of April



Thank you for your time and consideration!

We appreciate you being a part of this process with us.



ITEM FOR ACTION AT A FUTURE MEETING

Date of Meeting

April 16, 2025

Title

Readopt Elementary and Secondary Health Curriculum Through 2032

Presenters

Erin Gaston, Elementary Curriculum & MTSS Administrator
Courtney Leonard, Secondary Curriculum & MTSS Administrator

Background

Per ODE's adoption cycle, health materials that meet Oregon's health standards must be in use in classrooms by fall of 2025. Eugene School District 4J adopted and implemented a comprehensive Health curriculum in elementary, middle and high school in 2022-23, resolving OAR Chapter 581, Division 22 compliance concerns and establishing coherent health education throughout the district. *The Great Body Shop* was unanimously selected for K-8 health instruction and *Live Well* was unanimously selected for high school by the respective adoption committees.

The adopted curriculum provides medically accurate, culturally inclusive, and skills-based instruction aligned with Oregon Health Education Standards. Implementation has successfully enhanced students' health decision-making skills across all grade levels.

These instructional materials ensure equitable health education access district-wide, reinforcing our commitment to equity and inclusion. The Board-approved curriculum creates valuable continuity, allowing students to progressively build health concepts and skills.

Currently, *The Great Body Shop* is the only health curriculum on ODE's approved materials list for elementary and is one of three curricula on ODE's approved list for middle school. *Live Well* is the only approved health curriculum on ODE's high school curriculum list.

Based on positive outcomes and previous unanimous recommendation from the 2022 Health Curriculum Adoption Team—comprised of K-12 teachers, counselors, Equity Managers, and Staff Development Specialists from all four regions—we propose readopting *The Great Body Shop* for K-8, and *Live Well* for high school, through 2032, maintaining educational continuity and state standards compliance.

Extension Proposal

We propose readopting the current health curriculum through 2032, which would include:

1. Continued access to teacher resources at each level
2. Annual updates to student materials reflecting current health science and best practices
3. Ongoing digital licenses for students and teachers
4. Continued multilingual support and accessibility features
5. Extension of the parent access portal
6. Ongoing annual professional development opportunities

Options and Alternatives

Without extending our current curriculum, we risk creating gaps in our K-12 arc. Any shift to new materials would require additional adoption processes, significant professional development, and potential disruption to our current and ongoing work. The established familiarity teachers have with current materials benefits instructional quality and student learning outcomes. Additionally, at elementary and high school, no other curriculum is currently approved by ODE for use in classrooms.

Which students, and how many, are served by this project?

This extension will continue serving all K-12 students across 19 in-person schools plus EOA, approximately 12,000 students annually. The extension period, 2025-2032, represents continued service to the majority of our student population.

Budget/Resource Implications:

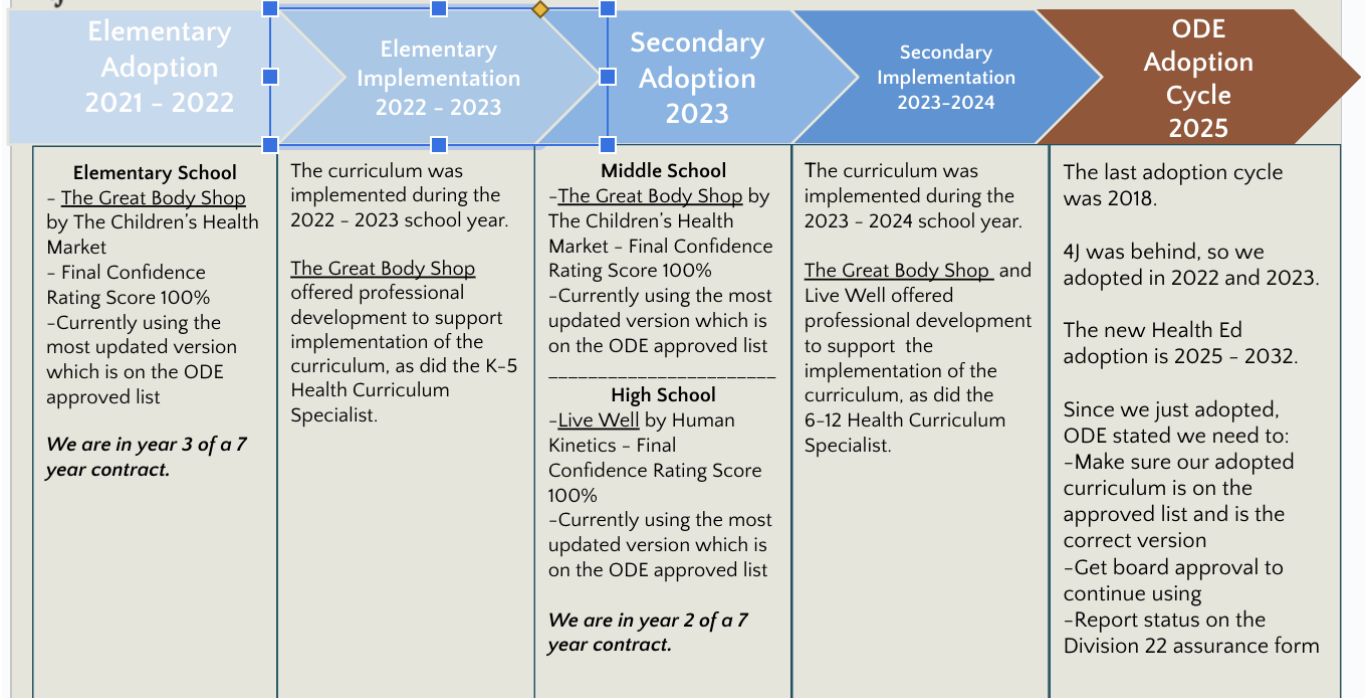
All materials were funded through a combination of bond monies and educational resource allocations beginning in 2022-23. Currently, we are in year 3 of a 7-year contract for *The Great Body Shop* at elementary, in year 2 of a 7-year contract at secondary with *The Great Body Shop*, and year 2 of a 7-year contract for *Live Well*.

Recommendation

The Superintendent recommends approval to continue the use of currently adopted Health instructional materials through 2032.



Materials Adoption Process Overview: K - 12 Health



Health Re-Adoption

Eugene SD 4J
April 2025



Current ARs

Adoption of Instructional Materials in a Non-Core Subject Areas & Supplemental Materials

- The superintendent will initiate the process
- The team reports to ILT for feedback and recommendation of material selection
- ILT will make a recommendation to the superintendent
- The superintendent will make the final decision.



Materials Adoption Process Overview: K - 12 Health

Elementary
Adoption
2021 - 2022

Elementary
Implementation
2022 - 2023

Secondary
Adoption
2023

Secondary
Implementation
2023-2024

ODE
Adoption
Cycle
2025

Elementary School

- The Great Body Shop by The Children's Health Market
- Final Confidence Rating Score 100%
- Currently using the most updated version which is on the ODE approved list

We are in year 3 of a 7 year contract.

The curriculum was implemented during the 2022 - 2023 school year.

The Great Body Shop offered professional development to support implementation of the curriculum, as did the K-5 Health Curriculum Specialist.

Middle School

- The Great Body Shop by The Children's Health Market - Final Confidence Rating Score 100%
- Currently using the most updated version which is on the ODE approved list

High School

- Live Well by Human Kinetics - Final Confidence Rating Score 100%
- Currently using the most updated version which is on the ODE approved list

We are in year 2 of a 7 year contract.

The curriculum was implemented during the 2023 - 2024 school year.

The Great Body Shop and Live Well offered professional development to support the implementation of the curriculum, as did the 6-12 Health Curriculum Specialist.

The last adoption cycle was 2018.

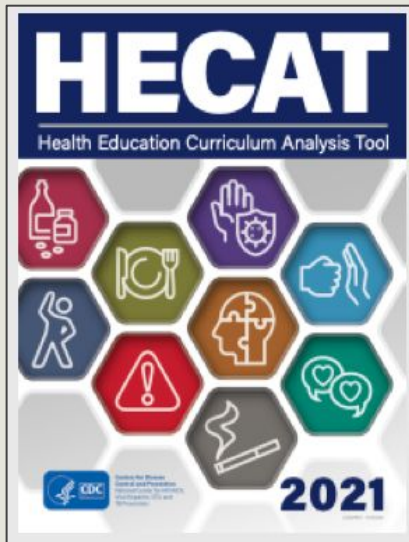
4J was behind, so we adopted in 2022 and 2023.

The new Health Ed adoption is 2025 - 2032.

Since we just adopted, ODE stated we need to:

- Make sure our adopted curriculum is on the approved list and ~~2023~~ the correct version
- Get board approval to continue using
- Report status on the Division 22 assurance form

Curriculum Analysis Resources: K - 12



Center for Disease Control's Health Education Curriculum Analysis Tool (both elementary & secondary)

DRAFT 4J EQUITY LENS: SHORT VERSION
An equity lens helps us identify potential impacts on under-served and marginalized individuals and groups, and to identify and potentially eliminate barriers.

4J

WHEN APPLYING AN EQUITY LENS ASK YOURSELF (OR YOUR GROUP):

PURPOSE
What are we trying to do? What is our goal?

INCLUSION
Who will be impacted and are they being included in the process?

OUTCOMES
How might this decision increase, decrease, or ignore equity?
Consider:
Race, gender identity, sexual orientation, LGBTQIA+, religion, age, country of origin, geography, disability, class/socio-economic status, the balance of power, etc.

Once you've determined what action you will take, ask yourself (or your work group):

COMMUNICATION
How will we ensure communication to those affected takes place in an inclusive and culturally sensitive manner?

EVALUATION
How will we know if we have accomplished our goal?

DRAFT 4J EQUITY LENS: EXPANDED VERSION
PURPOSE & ASSUMPTIONS
What are we trying to do?
What is the issue, policy, or process being examined?
What assumptions are we bringing into the issue?

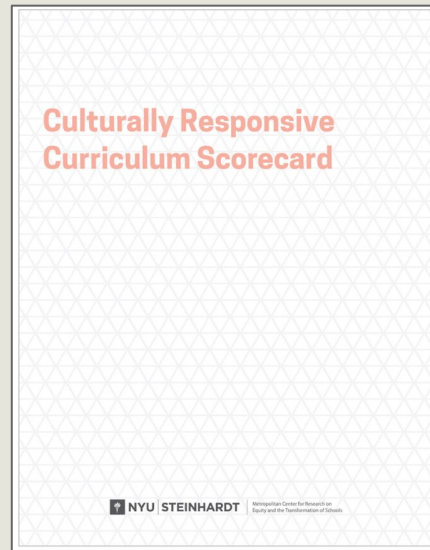
INCLUSION/REPRESENTATION
Who is included in this process?
Who is not included in this process? And why?
How are we intentionally engaging multiple perspectives?
How have barriers to participation been addressed?

IMPACT/OUTCOMES
What are the outcomes we are hoping to create?
What are potential unintended outcomes? How will we address these?
Who is being affected by this decision (Policy, Issue, and Process)?
How might this decision increase, decrease, or ignore equity?
Consider: race, gender identity, sexual orientation, LGBTQIA+, religion, age, country of origin, geography, disability, class/socio-economic status, language, the balance of power, etc.

PROCESS/COMMUNICATION
How and when will the process be communicated?
How will you ensure communication takes place in an inclusive, culturally sensitive and responsible manner?

EVALUATION/FEEDBACK
Are we accomplishing our initial goal?
What barriers prevented more equitable outcomes? How will you address these?
How will we incorporate this learning next time?
How will feedback from staff and stakeholders be collected?
Who will we share evaluations with?
What did we learn from this?
How will you use evaluation and learning to raise racial awareness?

Eugene School District 4J Equity Lens guidance document (short version)



NYU's Culturally Responsive Curriculum Scorecard (Literacy focused, adapted portions for Health curriculum analysis)



Elementary

K-5 Health Adoption

2021 - 2022



Elementary School: K - 5th



The Children's Health Market



100% Final Confidence Rating Score



Qualifications

- Utilized the HECAT (Health Education Curriculum Evaluation Tool) as core evaluation tool.
- Currently using the most updated version. (Lessons are updated yearly online and student lessons updated annually).
- Great Body Shop is the only approved comprehensive K-5 health curriculum on the [ODE approved materials list](#) for elementary.
- In year 3 of a 7 year contract. We would extend the contract until the next adoption cycle in 2032.



Secondary

6 - 8 & 9th Health Adoption

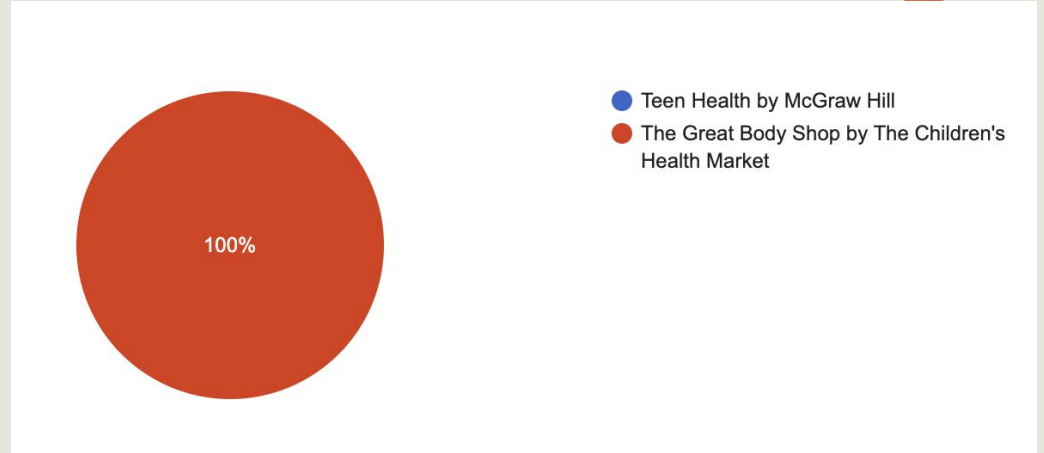
2023



Middle School (6-8)



The Children's Health Market



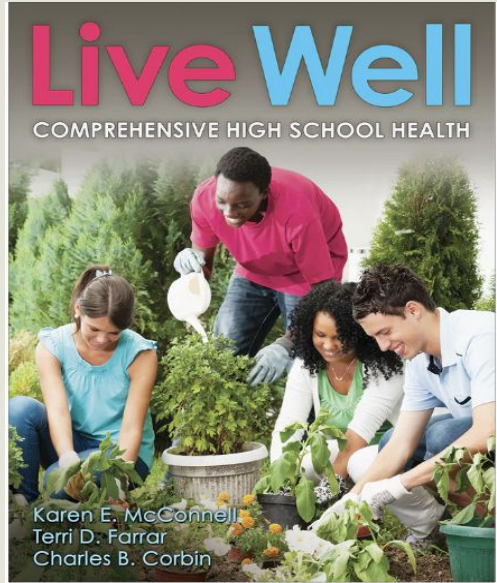
100% Final Confidence Rating Score



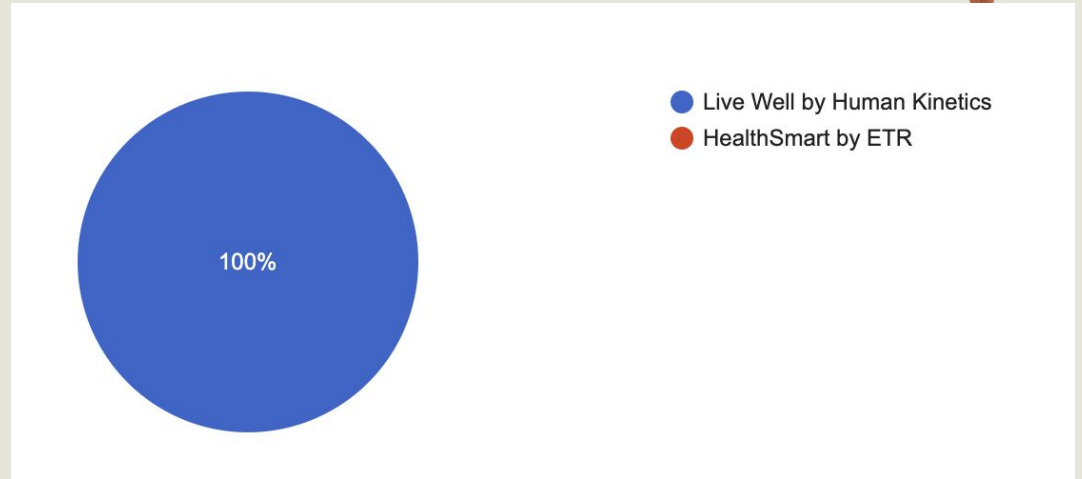
Qualifications

- Utilized the Health Education Curriculum Evaluation Tool (HECAT) as core evaluation tool.
- Currently using the updated version– lessons are updated yearly online.
- The Great Body Shop is currently one of the three approved [ODE approved materials list](#).
- Currently, in year 2 of a 7 year contract. ***We will extend our contract to 2032!***

High School (9th) 0.5 Credit



Human Kinetics



100% Final Confidence Rating Score



Qualifications

- Utilized the Health Education Curriculum Evaluation Tool (HECAT) as core evaluation tool.
- Currently using the updated version.
- The only materials on the approved [ODE approved materials list](#) for high school.
- Currently in year 2 of a 7 year contract.

High School beyond 9th - 0.5 credit



Options for students:

- First Aid & Wellness - Health TOSA and teachers working together to align independent materials
- Human Sexuality - Adopted materials and aligned course in 2024
- Nutrition - Health TOSA and teachers working together to align independent materials
- Health and Life Management - Health TOSA and teachers working together to align independent materials
- Some high schools have additional health courses available to students.

Thanks!



ITEM FOR ACTION AT A FUTURE MEETING

Date

April 16, 2025

Title

Set Student 2025-26 Transfer Limits as per Policy JECB (First Read)

Presenter

Carmen Xiomara Urbina, Chief of Staff

Description

The Board must annually approve the maximum number of interdistrict transfer requests—both into and out of the district—that will be granted for the upcoming school year. Action Item: Approve Enrollment of Out-of-District Students for 2025–26 (Interdistrict Transfers)

Relevant Policies

[Intradistrict School Choice-JECC](#)

[Intradistrict School Choice-JECC-AR](#)

[Admission of Nonresident Students](#)

Purpose of Action:

In accordance with Oregon state law and Board Policy JECB: *Admission of Nonresident Students*, the Eugene School District 4J Board of Directors is asked to approve the maximum number of interdistrict transfer requests for the 2025–26 school year. This annual action is required by June 30 and allows the district to establish limits for both students transferring into and out of the district. The Board may later revise these limits if no pending student transfer applications remain.

Legal and Procedural Context:

Interdistrict transfers allow students who live outside of 4J boundaries to enroll in the district, contingent upon consent from both their home district and 4J. Once an interdistrict transfer is approved, it remains valid through the duration of a student's enrollment at the same school or within a continuous K–12 language immersion program. Families are only required to reapply for a transfer if the student is changing schools or school levels (e.g., moving from elementary to middle school). Additionally, state law specifies that consent from the student's home district is required only once; it does not need to be renewed annually. Consistent with district policy, students who reside within 4J must be offered placement before space is made available to nonresident students.

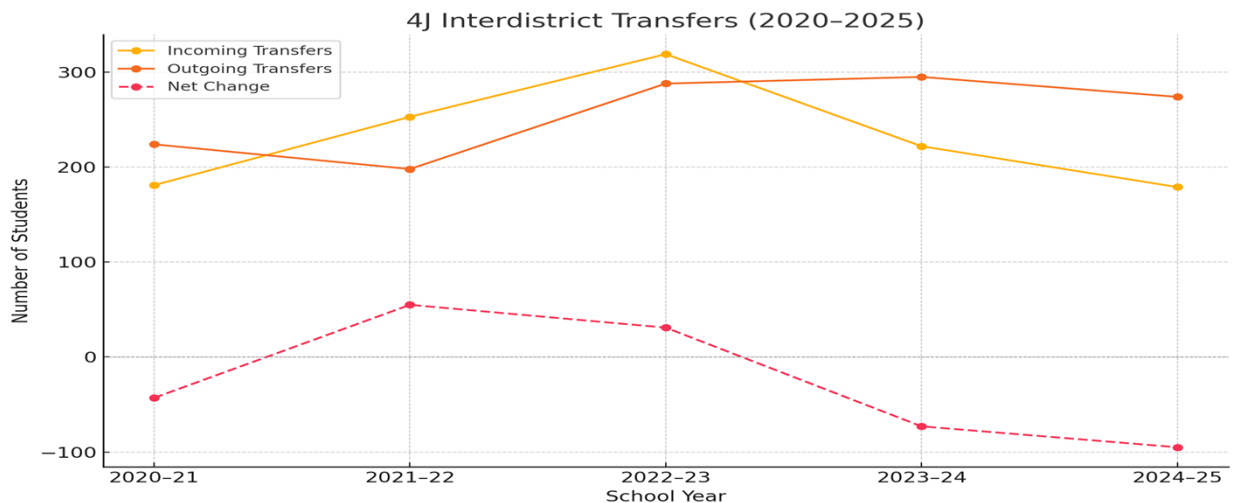
Historical Transfer Trends (2020–2025):

Over the past five years, Eugene School District 4J has seen a notable shift in interdistrict transfer patterns. From 2020–21 through 2022–23, the district experienced net gains in enrollment from interdistrict transfers. However, this trend reversed in the past two school years. In 2023–24, 4J recorded a net loss of 73 students through interdistrict transfers, and in 2024–25, the loss increased to 95 students. Notably, 2024–25 marked the lowest number of incoming transfers in five years, with only 179 students enrolling from outside the district despite strong demand.

Table: 4J Interdistrict Transfer Trends (2020–2025)

School Year	Incoming Transfers	Outgoing Transfers	Net Change
2020–21	181	224	–43
2021–22	253	198	+55
2022–23	319	288	+31
2023–24	222	295	–73
2024–25	179	274	–95

Graph: 4J Interdistrict Transfers (2020–2025)



(Displayed graph visualizing incoming, outgoing, and net transfers over five years)

Early Indicators for 2025–26:

As of March 2025, 464 —90 more than were received during the same time period in 2024. While final figures are still pending completion of the April 15th lottery, this early increase signals continued interest in 4J from families in surrounding districts. However, not all applicants will be offered enrollment.

Enrollment and Placement Process:

Families requesting interdistrict transfers are asked to list preferred schools from among those that may have available space. If space is available and there are no resident students on the waitlist, 4J uses an equitable lottery process to determine placement. The process includes priority for students returning to the same school and for siblings of current students. Oregon law prohibits the district from giving enrollment preference based on race, ability, or economic status.

Budget and Resource Implications:

Oregon’s school funding formula allocates resources based on enrollment. When students transfer into the district, the per-pupil funding they generate follows them, providing additional resources that support programming. In most cases, this results in a net neutral or positive impact. However, in some cases, particularly when a student requires specialized services such as special education or mental health support, the cost of providing services may exceed the funding received.

Equity Considerations:

The district uses a lottery system for both in-district school choice and interdistrict transfers to promote equitable access to schools, regardless of a family’s socioeconomic status or ability to monitor transfer windows. Despite these systems, access to transportation remains a major barrier for many families. The district does not provide transportation for students attending schools other than their neighborhood school, which disproportionately affects low-income and rural families. Additionally, although many students receive offers for transfer, a growing number of those offers are declined—113 in 2024–25 alone—often due to timing issues, lack of preferred school placement, or families securing alternatives before offers are made.

Strategic Questions for Future Consideration:

Since 2018, the district’s cap of 400 incoming and 400 outgoing transfers has provided a stable foundation for managing enrollment. As student needs and enrollment patterns evolve, this is a valuable moment to reflect on how well the current limits support our district’s goals, budget priorities, and commitment to serving all families equitably. There is also a promising opportunity to explore increased intra-district flexibility—one that could better respond to the preferences of resident families while potentially creating additional access for incoming students.

By building on the district’s strengths in school choice and family engagement, increasing transparency around placement timelines, waitlists, and school matching can further empower families to make informed decisions and deepen trust in the process. This approach not only enhances family experience but also aligns with our broader equity goals and strategic planning efforts to ensure access, consistency, and responsiveness across the system.

In addition, understanding the motivations of families who choose to leave—whether related to academic programming, extracurricular offerings, transportation access, housing costs, or changing family circumstances—offers a meaningful opportunity to listen, learn, and grow. These insights can help the district continue to adapt and improve, ensuring that every family feels supported and every student has access to high-quality educational opportunities.

Interdistrict Transfers: Where Are Our Students Going?

Each year, Eugene School District 4J sees students both transferring into the district from neighboring areas and transferring out to other districts or online schools. The following section provides a snapshot of interdistrict transfer patterns from 2022–23 through 2024–25, highlighting where students are coming from and where they are going. It also includes early data for 2025–26 transfer requests. These trends offer insight into family choices, program demand, and regional enrollment dynamics that may influence district planning and resource allocation.

Incoming Students to 4J (2024–25)

Students who transferred **into 4J** came primarily from:

- **Bethel** – 86 students
- **Springfield** – 54 students
- **Junction City** – 24 students
- **Fern Ridge** – 16 students
- **Crow-Applegate-Lorane** – 5 students
- **Pleasant Hill** – 5 students

Smaller numbers came from other nearby districts like Creswell, South Lane, Harrisburg, etc.

Total Incoming Transfers: 204 students

Outgoing Students from 4J (2024–25)

Students who transferred **out of 4J** went most commonly to:

- **Bethel** – 110 students
- **Springfield** – 96 students
- **Online Schools (out-of-district)** – 31 students
- **Harrisburg** – 10 students
- **Lowell** – 10 students
- **Fern Ridge** – 9 students

Total Outgoing Transfers: 284 students

Early Requests for 2025–26 Transfers (as of April 3, 2025)

So far, **46 students** have requested to leave 4J in 2025–26:

- **Springfield** – 22 students
- **Online (Out-of-District, including Nyssa)** – 22 students
- **Fern Ridge** – 2 students

Key Takeaways:

- **4J continues to experience a net outflow** of students, with **more students transferring out than in** (284 out vs. 204 in for 2024–25).
- **Springfield and Bethel** remain the most common destinations and sources for interdistrict transfers.
- There is a growing interest in **online schools** based outside the district.
- Most **incoming students** live in **neighboring districts** and transfer into 4J likely for specific programs or personal preferences.

Conclusion and Recommendation

The Superintendent recommends that the Board approve the proposed interdistrict transfer limits for the 2025–26 school year—up to **400 students transferring into Eugene School District 4J** and up to **400 students transferring out to other school districts**. These limits have remained consistent in recent years and are set intentionally higher than the expected number of requests to ensure space is available for all students who may qualify under district policy.

This action ensures compliance with state law and supports the district’s efforts to manage enrollment responsibly. Additionally, the Superintendent recommends that the Board consider reviewing the 400-student cap in the future and direct staff to evaluate how current transfer practices align with 4J’s goals for equity, family satisfaction, and enrollment sustainability.

Set 2025–26 Interdistrict Transfer Limits



Board Item for Future Action | April 16, 2025

Presenter: Carmen Xiomara Urbina, Chief of Staff



Purpose of Action



- The annual Board action is required under state law and Board Policy JECB.
- This action sets enrollment limits for both incoming and outgoing interdistrict transfers.
- It also supports compliance, planning, and resource allocation for the 2025–26 school year.

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Legal & Procedural Context



Key points of legal process:

- Transfers require consent from both the student's home district and Eugene School District 4J.
- Once a transfer is approved, it remains valid through the student's current school level or language program.
- The home district is not required to provide re-consent each year once the initial transfer is approved.
- Students who reside within 4J boundaries are always prioritized before offers are extended to nonresident students.

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Historical Trends (2020–2025)

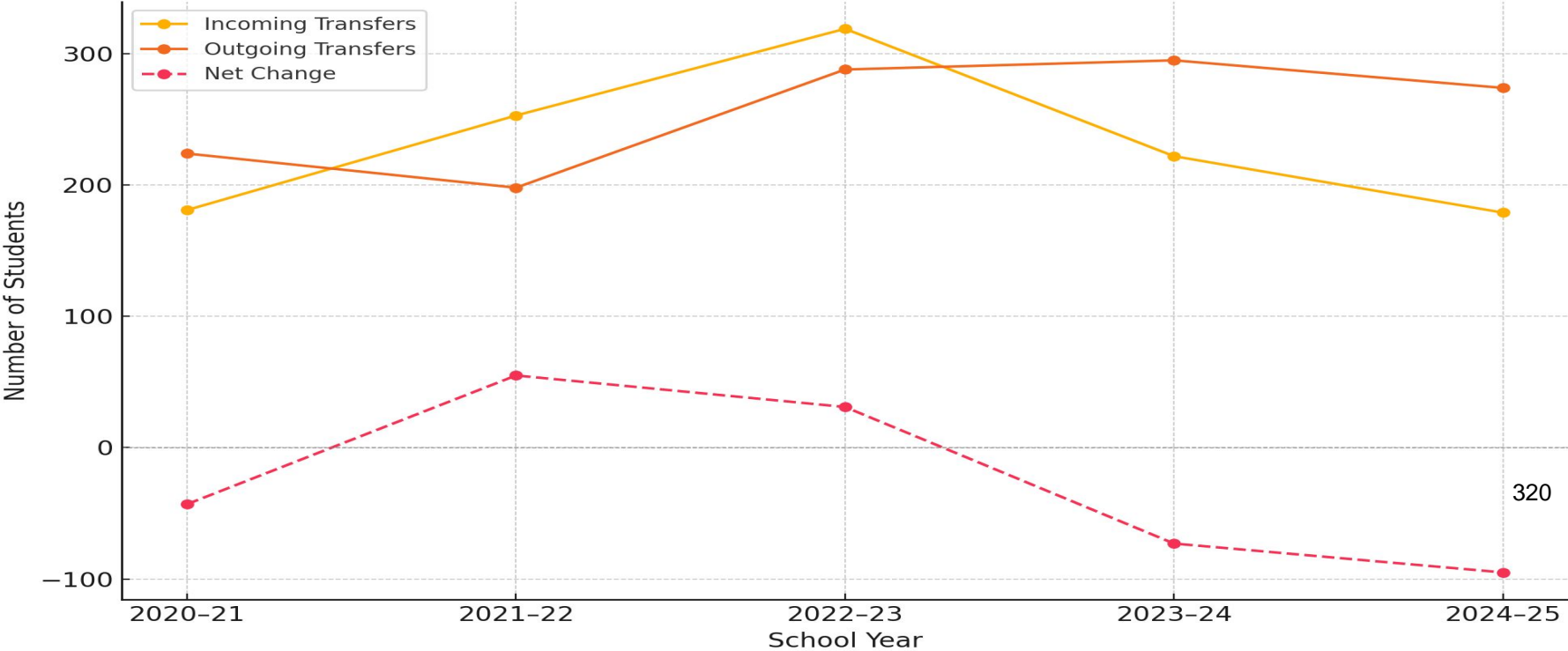


Transfer data over the past five years:

School Year	Incoming Transfers	Outgoing Transfers	Net Change
2020–21	181	224	-43
2021–22	253	198	+55
2022–23	319	288	+31
2023–24	222	295	-73
2024–25	179	274	-95

Transfer Trends Graph (2020–2025)

4j Interdistrict Transfers (2020–2025)



Early Indicators for 2025–26



Snapshot as of March 2025:

- As of March 2025, there have been 464 interdistrict transfer requests submitted.
- This represents an increase of 90 requests compared to the previous year.
- Final numbers will be determined following the April 15³²¹ lottery.

Enrollment & Placement Process



Transfer placement process:

- Families are asked to rank their preferred schools when submitting a transfer request.
- If space is available and there are no 4J resident students on the waiting list, a lottery is used to determine placement.
- The lottery prioritizes returning students and siblings of currently enrolled students.
- The process does not include preferences based on race, ability, or income.

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Budget & Resource Implications



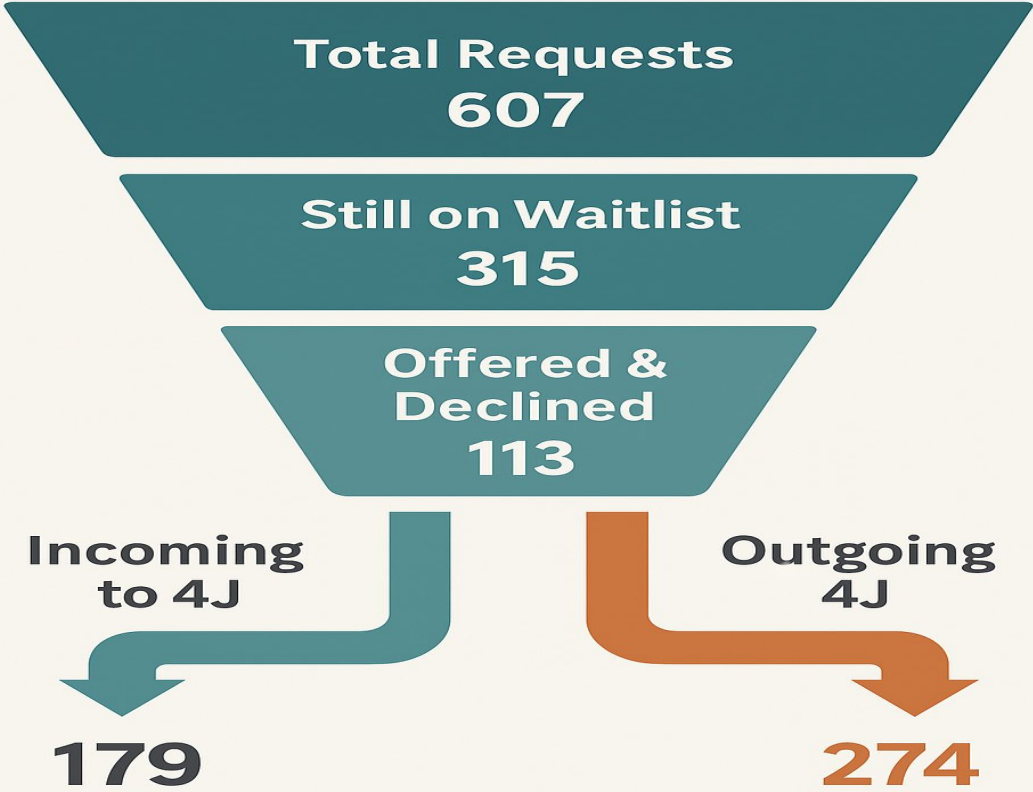
- State funding follows the student to the district in which they enroll.
- In most cases, the financial impact of transfer students is net neutral or positive for the district.
- In some cases, the cost of providing high-need services may exceed the revenue generated by the student.

Equity Considerations



- The lottery system is designed to promote fairness and equity for families seeking transfers.
- A significant barrier for many families is the lack of district-provided transportation for transfer students.
- In the 2024–25 school year, 113 families declined transfer offers due to factors such as timing, school mismatch, or alternative options.³²⁴

Student Choice Funnel



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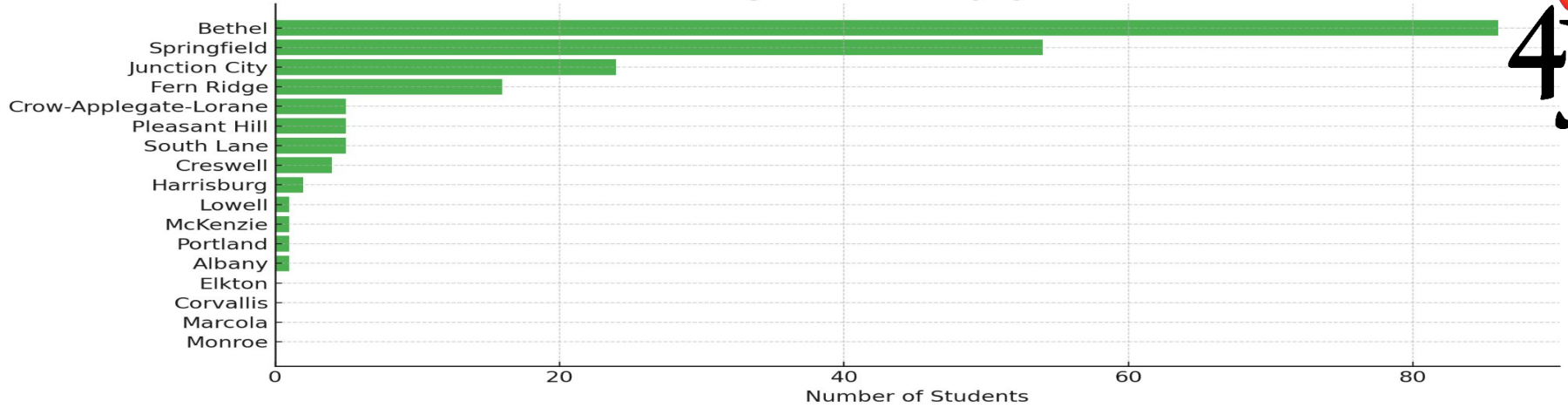
2024–25 Transfer Snapshot



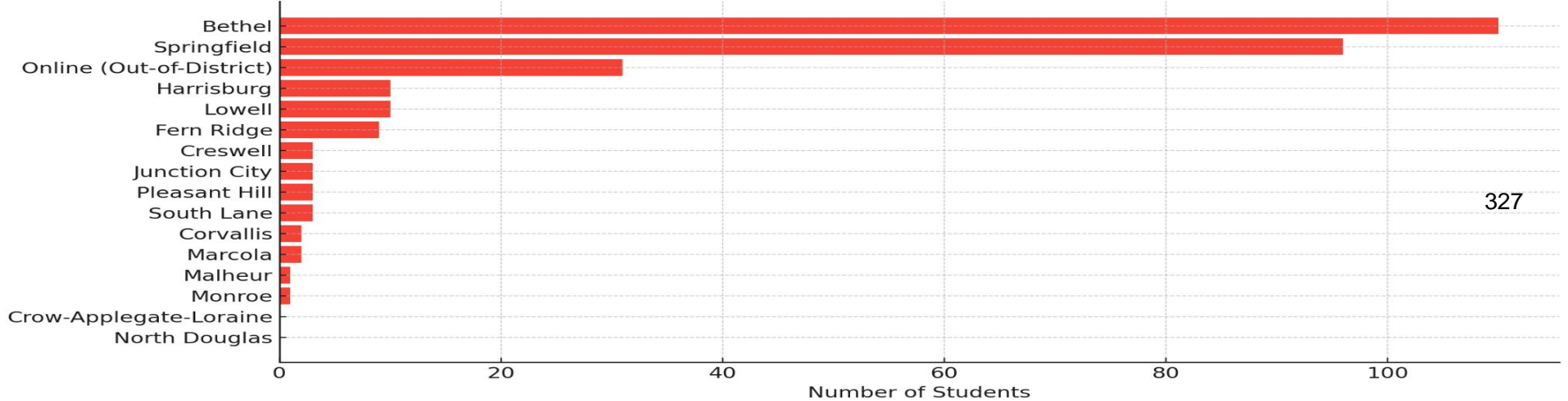
Top sending and receiving districts:

- Incoming: Bethel (86), Springfield (54), Junction City (24)
- Outgoing: Bethel (110), Springfield (96), Online (31)

2024-25 Incoming Transfers to 4J by District of Residence



2024-25 Outgoing Transfers from 4J by Receiving District



Early Outgoing Transfer Request Snapshot



As of March 2025

- **Total Requests:** 464 (an increase of 90 compared to the same time last year)
- **Final Numbers:** To be confirmed following the April 15 lottery
- **Top Destinations Requested So Far:**
 - Springfield – 22 requests
 - Online (Out-of-District) – 22 requests
 - Fern Ridge – 2 requests

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Strategic Questions for Future



Areas for reflection and review:

- The district may need to reflect on whether the current cap of 400 transfers is still appropriate.
- There is an opportunity to consider whether increased flexibility within the district could better support student and family needs.
- Improving family trust and transparency should remain a key area of focus.
- It is important to understand the reasons why some families are choosing to leave the district.

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Conclusion & Recommendation



Superintendent's recommendation:

- Approve 400 transfers INTO and 400 transfers OUT OF 4J for 2025–26
- Allows flexibility and legal compliance
- Recommend future cap review and alignment with district goals
- This approval supports equity, enrollment strategy, and legal requirements while keeping space open for those who need it.

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Gratitude

With Deep Appreciation

- Thank you to **Tamar Moyse** and **Oscar Loureiro** for your ongoing dedication, insight, and care in supporting students and families across 4J.
- And to our Board—thank you for your leadership and unwavering commitment to every child, every day.





QUESTIONS





ITEM FOR ACTION AT A FUTURE MEETING (First Read)

Date of Meeting

April 16, 2025

Title

Consider for approval revisions to Policy KBA – Public Records**

Presenter

Christine Nesbit, General Counsel

Background:

To foster transparency and provide an accurate accounting of how the district carries out the public’s business, staff are to ensure that district records be disclosed courteously and consistent with state and federal law.

A “public record” includes any writing that contains information relating to the conduct of the public’s business, prepared, owned, used or retained by the district regardless of physical form or characteristics, unless otherwise exempted by law. “Writing” means handwriting, typewriting, printing, photographing and every means of recording, including letters, words, pictures, sounds, or symbols or combination thereof and all papers, maps, files, facsimiles or electronic recordings. Public record does not include any writing that does not relate to the conduct of the public’s business and that is contained on a privately owned computer.

There have been some minor changes to the definition of public records under [ORS 192.005](#), which describes any information generated by the school in course of business “necessary to satisfy the legal, administrative, fiscal, tribal cultural or historical policies, requirements or needs of the state agency or political subdivision.” (ORS 192.005 (5) as amended by House Bill 2112 (2023)) Other changes made in ORS 192, specifically [ORS 192.050](#) include updating terminology to how terms are used in today’s public operations, e.g., analog or digital audio and video tape technology changing to *audio or video technology or audio recording and video recording*. Additionally, in [ORS 192.060](#), any records made under ORS 192.040 and 192.050 “*shall be properly indexed and filed so as to facilitate access and retrieval.*” (ORS 192.060 as amended by [House Bill 2112](#) (2023))

Summary:

The revisions to Policy KBA-Public Records align closely to the revisions recommended by the Oregon School Board Association (OSBA), including its legal counsel. These proposed revisions have been reviewed by 4J General Counsel and discussed with the Policy Work Group.

Code:	KBA
Adopted:	12/19/18
Revised/Readopted:	XX/XX/XX

Proposed Revisions Format:

Revised content presented in **RED Font**;
Deleted content presented in **GREEN Font**;
Continuing policy content in **BLACK Font**

Options and Alternatives:

The Board may choose to accept proposed revisions to Policy KBA – Public Records. The Board may wish to direct staff to make further revisions.

The Board has the authority to approve a policy on the “First Read” should they choose to do so

Recommendation: The superintendent recommends the Board approve revisions to Policy KBA – Public Records

Eugene School District 4J

Code: KBA
Adopted: 12/19/18; XX/XX/XX

Public Records**

~~“Public record” means any information that:~~

- ~~1. Is prepared, owned, used or retained by the district;~~
- ~~2. Is related to an activity, Transaction or function of the district; and~~
- ~~3. Is necessary to satisfy the fiscal, legal, administrative or historical policies, requirements or needs of the district.~~

~~Public record does not include messages on voice mail or on other telephone message storage and retrieval systems, or spoken communication that is not recorded.~~

To foster transparency and provide an accurate accounting of how the district carries out the public’s business, it is the intent of the Board that district records should be disclosed courteously and consistent with state and federal law.

A request to inspect or receive a copy of a public record shall be in writing and will be presented to the ~~superintendent’s districts public records~~ office.

A “public record” includes any writing that contains information relating to the conduct of the public’s business, prepared, owned, used or retained by the district regardless of physical form or characteristics, unless otherwise exempted by law.¹ “Writing” means handwriting, typewriting, printing, photographing and every means of recording, including letters, words, pictures, sounds, or symbols or combination thereof and all papers, maps, files, facsimiles or electronic recordings. Public record does not include any writing that does not relate to the conduct of the public’s business and that is contained on a privately owned computer.²

All such information will be made available to individuals with disabilities in an accessible format, upon request and with appropriate advanced notice. Auxiliary aids and services available to ensure equally effective communications to qualified persons with disabilities may include large print, Braille, audio recordings, readers, assistance in locating materials or other equally effective accommodations.

The Board supports the right of the people to know about programs and services of their schools and will make reasonable efforts to disseminate information. Each principal is authorized to use available means to keep parents and others in the particular school’s community informed about the school’s program and activities.

¹ There are multiple definitions for “public record” in ORS 192. This definition comes from ORS 192.311 and applies to the inspection of records.

² In accordance with Bialostosky v. Cummings, 319 Or. App. 352 (2022), an individual board member may be considered a public body for public record purposes. Consequently, records created and retained solely by individual board members may be considered public records.

~~Board meetings and records will be matters of public information subject to such restrictions as are set by federal law or regulation, by state statute or by pertinent court rulings.~~

~~No records will be released for inspection by the public or any unauthorized persons either by the superintendent or any other person designated as a custodian for district records if such disclosure would be contrary to the public interest, as described in state law.~~

The Board ~~reserves~~ ~~directs~~ the ~~right~~ ~~superintendent~~ to establish a fee schedule which will reasonably reimburse the district for the actual cost of making public records available pursuant to law. The district will not be obligated to complete a request for which the requester has not paid the fee as permitted by state law. There will be no additional charge for auxiliary aids and services provided for ~~qualified~~ persons with disabilities.

Employee and volunteer ~~personal residential~~ addresses, ~~personal~~ electronic and mail address, ~~(other than district electronic mail addresses assigned by the district to district employees)~~, social security numbers, dates of birth ~~and personal telephone or cellular numbers, and other information listed in Oregon Revised Statute(ORS)192.355 as exempt~~, contained in personnel records maintained by the district are exempt from public disclosure pursuant to ~~Oregon Revised Statute~~ ORS 192.363-369 ~~455~~ and ORS 192.355 ~~502~~(3). ~~District electronic mail addresses assigned~~ ~~Such information may be released only upon the written request of the employee or volunteer or as otherwise provided by the district to district employees are not exempt law.~~ This exemption does not apply to a substitute teacher, as defined in ORS 342.815, when requested by a professional education association of which the substitute teacher may be a member. ~~District electronic mail addresses assigned by the district to district employees are not exempt.~~

The district will not disclose the identification badge or card of an employee without the employee's written consent if the badge or card contains the employee's photograph and the badge or card was prepared solely for internal use by the district to identify district employees. A duplicate of the photograph used on the badge or card shall not be disclosed.

The district shall not, in accordance with state law, disclose personal information for the purpose of enforcement of federal immigration laws.

The district shall retain and maintain its public records in accordance with Oregon Administrative Rule (OAR) 166-005-0010 ~~and Chapter 166, Division 400 and ORS Chapter 192.~~

END OF POLICY

Legal Reference(s):

~~ORS 180.805~~

[OAR 137-004-0800\(1\)](#)

[OAR 166-400](#)

~~ORS Chapter 192~~

[OAR 166-005-0010](#)

~~SB 481 (2017)~~

~~HB 3464 (2017)~~

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2021); 28 C.F.R. Part 35 (2021).

OREGON DEP'T OF JUSTICE, OREGON ATTORNEY GENERAL, *Public Records and Meetings Manual*.

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018).

[Bialostosky v. Cummings](#), 319 Or. App. 352 (2022).



ITEM FOR ACTION AT A FUTURE MEETING (First Read)

Date of Meeting

April 16, 2025

Title

Consider for approval revisions to Policy GBEA – Workplace Harassment

Presenters

Christine Nesbit, General Counsel

Background:

School Board Policies are statements which set forth the purpose and prescribe in general terms the organization and program of a school system. They create a framework within which the superintendent and staff can discharge their assigned duties with positive direction.

Policy GBEA – Workplace Harassment was last updated in 2022.

Summary:

It has become necessary to make some changes to Policy GBEA for two reasons.

The primary change is to add clarity to the section of the policy relating to agreements with employees containing nondisparagement, nondisclosure, or other provisions that have the purpose or effect of preventing the employee from disclosing or discussing workplace harassment. Generally, such provisions are illegal, but they are permitted when the employee who has made the allegation of workplace harassment voluntarily requests.

The other change is to clarify that when a board member is found to be in violation of the workplace harassment policy, the Board will determine the sanctions.

It is the intent of the Board that appropriate corrective action will be taken by the district to stop workplace harassment, prevent its recurrence and address negative consequences. Staff members in violation of this policy shall be subject to discipline, up to and including dismissal and/or additional workplace harassment awareness training, as appropriate. Other individuals (e.g., board members, witnesses, and volunteers) whose behavior is found to be in violation of this policy shall be subject to appropriate sanctions as determined and imposed by the superintendent or, **where a board member is the responding party**, the Board.

Policy GBEA was most recently revised in 2022.

Code:	GBEA
Adopted:	12/14/22
Revised/Readopted	XX/XX/XX

Proposed Revisions Format:

Revised content presented in **RED Font**;

Deleted content presented in **GREEN Font**;

Continuing policy content in **BLACK Font**

Options and Alternatives:

The Board may choose to adopt Policy GBEA – Workplace Harassment or the Board may wish to direct staff to make revisions to the proposed policy.

The Board has the authority to approve a policy on the “First Read” should they choose to do so

Recommendation

The superintendent recommends the Board adopt revisions to Policy GBEA – Workplace Harassment.

Eugene School District 4J

Code: GBEA
Adopted: 12/14/22; XX/XX/XX

Workplace Harassment

Workplace harassment is prohibited and shall not be tolerated. This includes workplace harassment that occurs between district employees or between a district employee and the district in the workplace or at a work-related event that is off district premises and coordinated by or through the district, or between a the district and a district employee off district premises. Elected school board members, volunteers and interns are subject to this policy.

Any district employee who believes they have been a victim of workplace harassment may file a report with the district employee designated in the administrative regulation GBEA-AR - Workplace Harassment Reporting and Procedure, may file a report through the Bureau of Labor and Industries' (BOLI) complaint resolution process or under any other available law. The reporting of such information is voluntary. The district employee making the report is advised to document any incidents of workplace harassment.

“Workplace harassment” means conduct that constitutes discrimination prohibited by Oregon Revised Statute (ORS) 659A.030 (discrimination in employment based on race, color, religion, sex, sexual orientation, gender identity, national origin, marital status, age, or expunged juvenile record), including conduct that constitutes sexual assault¹ or that constitutes conduct prohibited by ORS 659A.082 (discrimination against person in uniformed service) or 659A.112 (discrimination in employment based on disability).

The district, upon receipt of a report from a district employee who believes they are a victim of workplace harassment, shall provide information about legal resources and counseling and support services, including any available employee assistance services. The district employee receiving the report, whether a supervisor of the employer or the district employee designated to receive reports, is advised to document any incidents of workplace harassment, and shall provide a copy of this policy and accompanying administrative regulation to the victim upon their disclosure about alleged workplace harassment.

All incidents of behavior that may violate this policy shall be promptly investigated. Any person who reports workplace harassment has the right to be protected from retaliation. The district may not require or coerce a district employee to enter into a non-disclosure² or non-disparagement³ agreement.

The district may not enter into an agreement with an a former, current employee or prospective employee, as a condition of employment, continued employment, promotion, compensation, or the receipt of benefits, that contains a nondisclosure provision, a nondisparagement provision or any other provision that has the purpose or effect of preventing the employee from disclosing or discussing workplace harassment that occurred between district employees or between a district employee and the district, in the workplace or at a work-

¹ “Sexual assault” means unwanted conduct of a sexual nature that is inflicted upon a person or compelled through the use of physical force, manipulation, threat or intimidation.

² A “nondisclosure” agreement or provision prevents either party from disclosing the contents of or circumstances surrounding the agreement.

³ A “nondisparagement” agreement or provision prevents either party from making disparaging statements about the other party.

related event that is off district premises and coordinated by or through the district, or **that occurred** between a district employee and **the district employer** off district premises.

The district may enter into a settlement **or agreement**, separation **or severance** agreement that includes one or more of the following provisions only when **the employee alleging a district employee claiming to be aggrieved by** workplace harassment **voluntarily** requests **their inclusion to enter into the agreement**:

- 1) a nondisclosure or nondisparagement provision **or other provision that has the purpose or effect of preventing the employee from disclosing or discussing workplace harassment**;
- 2) a provision that prevents **the disclosure of the amount of or fact of any settlement factual information relating to the claim of workplace harassment**; or
- 3) a no-rehire provision that prohibits the employee from seeking reemployment with the district as a term or condition of the agreement. The agreement must provide the district employee at least seven days after signing the agreement to revoke it, **and may not be effective until after the revocation period has expired**.

If the district determines in good faith that an employee has engaged in workplace harassment, the district may enter into a settlement, separation or severance agreement that includes one or more of the provisions described in the previous paragraph, **with that employee**.

It is the intent of the Board that appropriate corrective action will be taken by the district to stop workplace harassment, prevent its recurrence and address negative consequences. Staff members in violation of this policy shall be subject to discipline, up to and including dismissal and/or additional workplace harassment awareness training, as appropriate. Other individuals (e.g., board members, witnesses, and volunteers) whose behavior is found to be in violation of this policy shall be subject to appropriate sanctions as determined and imposed by the superintendent or, **where the superintendent is the responding party**, the Board.

The district shall make this policy available to all district employees and shall be made a part of district orientation materials provided and copied to new district employees at the time of hire.

The superintendent will establish a process of reporting incidents of workplace harassment and the prompt investigation.

END OF POLICY

Legal Reference(s):

ORS 174.100	ORS 659A.029	ORS 659A.820
ORS 243.317 - 243.323	ORS 659A.030	ORS 659A.875
ORS 659A.001	ORS 659A.082	ORS 659A.885
ORS 659A.003	ORS 659A.112	OAR 584-020-0040
ORS 659A.006	ORS 659A.370	OAR 584-020-0041

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018). Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018). Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2020). Bartsch v. Elkton School District, FDA-13-011 (March 27, 2014).

Cross Reference(s):

AC - Nondiscrimination
ACA - Americans with Disabilities Act ACB -
Hate Symbols and Bias Incidents GBA -



ITEM FOR ACTION AT A FUTURE MEETING (First Read)

Date of Meeting

April 16, 2025

Title

Consider for Adoption Policy JGA – Corporal Punishment

Presenter

Larry Williams, Assistant Superintendent for Instruction and Access

Background:

A change to [ORS 161.205](#) on issues of corporal punishment was put into effect by Senate Bill 577. The procedures for responding to an incident of restraint or seclusion are found in [ORS 339.294](#) and were amended by [Senate Bill 1024](#) (2023; see Section 3 which begins on page 5 of the SB). These amended procedures are also represented in the changes to policy JGAB – Use of Restraint or Seclusion ([Link](#)), which the board approved on January 15, 2025.

Policy language states:

The use of corporal punishment in any form is strictly prohibited in the district. No student will be subject to the infliction of corporal punishment.

No teacher, administrator, other school personnel or school volunteer will subject a student to corporal punishment or condone the use of corporal punishment by any person under their supervision or control. Permission to administer corporal punishment will not be sought or accepted from any parent or school official.

There are several changes to highlight of which two are:

- Addition of immediate notice to the parent or guardian of any existing record, including audio or video, of the incident (which will be preserved in the original format without alternation), and
- Such record shall be reviewed at the debriefing meeting, to which parents shall be invited.

Additional information regarding the preservation and disclosure of such records, which have record retention and disclosure implications, are outlined in the new SB, subsection 9 and 10.

Summary:

The district’s responsibility is to update the current board policies and comply with the new procedural requirements.

Staff respectfully ask that the Board approve the revisions made to Policy JGA – Corporal Punishment.

Code:	JGA
Adopted:	5/01/14
Revised/Readopted:	11/28/28; 9/01/21; XX/XX/XX
Orig. Code:	JGA

Proposed Revisions Format:

Revised content presented in **RED Font**;
Deleted content presented in **GREEN Font**;
Continuing policy content in **BLACK Font**

Options and Alternatives:

The Board may choose to adopt Policy JGA – Corporal Punishment. The Board may wish to direct staff to make further revisions.

The Board has the authority to approve a policy on the “First Read” should they choose to do so

Recommendation: The superintendent recommends the Board approve revisions to Policy JGA – Corporal Punishment.

Eugene School District 4J

Code: JGA
Adopted: 5/07/14
Revised/Readopted: 11/28/18; 9/01/21; ~~XX/XX/XX~~
Orig. Code: JGA

Corporal Punishment**

The use of corporal punishment in any form is strictly prohibited **in the district**. No student will be subject to the infliction of corporal punishment.

“Corporal punishment” is defined as the willful infliction of, or willfully causing the infliction of, physical pain. **Corporal punishment does not include the use of physical force authorized in ORS 161.205 (2), (4) or (5) for the reasons specified therein, or physical pain or discomfort resulting from or caused by participation in athletic competition or other such recreational activity, voluntarily engaged in by a student.**

No teacher, administrator, other school personnel or school volunteer will subject a student to corporal punishment or condone the use of corporal punishment by any person under their supervision or control. Permission to administer corporal punishment will not be sought or accepted from any parent or school official.

A parent or legal guardian of a minor child may use reasonable physical force upon the minor child when and to the extent the person reasonably believes the physical force is necessary to maintain discipline or promote the welfare of the minor child, unless the physical force constitutes abuse as defined in ORS 418.257 or 419B.005.

A staff member is authorized to employ reasonable physical force upon a student only ~~when and~~ to the extent that the application of physical force is consistent with ORS 339.285 - 339.303 and **is not corporal punishment as defined in ORS 339.250(9).** ~~board policy JGAB Use of Restraint or Seclusion.~~ Physical force shall not be used to discipline or punish a student.

A staff member found in violation of this policy may be subject to discipline up to and including dismissal. A volunteer found in violation of this policy by administration may be subject to sanctions and/or prohibited from volunteer service in the district.

The superintendent **or designee** shall inform all staff members and volunteers of this policy.

END OF POLICY

Legal Reference(s):

[ORS 161.205](#)

[ORS 332.107](#)

[ORS 339.240](#)

[ORS 339.250](#)

[OAR 581-021-0050 – 0075](#)

[OAR 584-020-0040](#)



ITEM FOR ACTION AT A FUTURE MEETING (First Read)

Date of Meeting

April 16, 2025

Title

Consider for Adoption Policy EBC – Emergency Plan and First Aid**

Presenter

Jen Bills, Director of School Safety and Emergency Management

Background:

[House Bill 3584](#) was passed in the 2023 legislative session. The bill requires districts to adopt policy language about using electronic communication to notify parents, guardians and employees within 24 hours of a safety threat action that was not a drill. The bill states the communication should be “provided in a manner that communicates relevant facts and details as necessary and useful.” (HB 3584, Section 1., (3)(b)).

The Oregon School Board Association (OSBA) recommends the Board adopt this new policy EBC – Emergency Plan and First Aid** and delete existing policy EBC/EBCA – Emergency Procedures and Disaster Plans.

Policy EBC – Emergency Plan and First Aid** is the third policy in series of policies recommend for revisions. At the March 5, 2025 meeting, the Board approved revisions to Policy EBCA – Safety Threats** and Policy EBCB – Emergency Procedure Drills and Instruction.

Summary:

Policy EBC – Emergency Plan and First Aid** was reviewed with the Policy Work Group on February 19, 2024 where content experts Jen Bills, Director of School Safety and Emergency Management and Joy Maxwell, Student Health Services Supervisor shared the proposed revisions and provided information on current practice.

Staff respectfully ask that the Board adopt Policy EBC and Delete Policy EBC/EBCA.

Code: EBC
Adopted: XX/XX/XX

Proposed Revisions Format:

Revised content presented in **RED Font**;
Deleted content presented in **GREEN Font**;
Continuing policy content in **BLACK Font**

Options and Alternatives:

The Board may choose to adopt Policy EBC – Emergency Plan and First Aid. The Board may wish to direct staff to make further revisions.

The Board has the authority to approve a policy on the “First Read” should they choose to do so

Recommendation: The superintendent recommends the Board adopt to EBC – Emergency Plan and First Aid** and delete Policy EBC/EBCA – Emergency Procedures and Disaster Plans.

Eugene School District 4J

Code: EBC
Adopted: XX/XX/XX

Emergency Plan and First Aid**

The district will maintain a comprehensive safety program for all employees and students. This program will include a plan for responding to emergency situations. The superintendent will consult with community and county agencies while developing this plan. The district's emergency plan will meet any requirements of the State Board of Education.

Copies of the emergency plan will be available in every school office and other strategic locations throughout the district. Parents or guardians will be informed of the district's plan.

In each district facility, procedures for handling health emergencies will be established and made known to staff. Each district facility and district vehicle will be equipped with first-aid supplies and equipment. All employees are expected to know where first-aid supplies and equipment are kept in their work areas.

Each school in the district shall have, at a minimum, at least one staff member with a current first-aid/CPR/AED card for every 60 students enrolled and who are trained annually on the district and building emergency plans. Emergency planning will include the presence of at least one staff member with a current first-aid/CPR/AED card for every 60 students for school-sponsored activities where students are present.

The district shall provide instruction to staff and students in the emergency plan and safety program.

END OF POLICY

Legal Reference(s):

<u>ORS 30.800</u>	<u>OAR 437-002-0042</u>	<u>OAR 581-022-2220</u>
<u>ORS 192.660(2)(k)</u>	<u>OAR 437-002-0120 - 0139</u>	<u>OAR 581-022-2225</u>
<u>ORS 332.107</u>	<u>OAR 437-002-0161</u>	<u>OAR 581-053-0003(40)</u>
<u>ORS 433.260</u>	<u>OAR 437-002-0360</u>	<u>OAR 581-053-0220(3)(e)(B)(iii)</u>
<u>ORS 433.441</u>	<u>OAR 437-002-0377</u>	<u>OAR 581-053-0320(5)(b)</u>
	<u>OAR 581-022-2030(3)(c)</u>	<u>OAR 581-053-0420(2)(f)(B)</u>

Every Student Succeeds Act, 20 U.S.C. § 7928 (2018).
Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g (2018).

Eugene School District 4J

Code: EBC/EBCA
Adopted: 6/17/20
Orig. Code: EBC/EBCA

Emergency Procedures and Disaster Plans

See NEW Policy EBC

The superintendent will develop and maintain a plan specifying procedures to be used in such emergencies as disorderly conduct, unlawful assembly, disturbances at school activities, natural disasters, fire, illness or injury of a student or staff member, and safety threats on district property. The superintendent will consult with community and county agencies while developing this plan.

The district's Emergency Procedures Plan will meet the standards of the State Board of Education.

Copies of the Emergency Procedures Plan will be available in every school office and other strategic locations throughout the district. Parents will be informed of the district's plan for the care of students during an emergency situation. The Board may use Oregon Revised Statute (ORS) 192.660(2)(k) to conduct an executive session to consider matters related to school safety or a plan that responds to safety threats made toward a school in the district.

In the case of long-term disruption to district operations as a result of a pandemic flu, declared public health emergency or other catastrophe, the district emergency plan shall at a minimum include the following:

1. Who is in charge of the district plan;
2. What steps the district will take to stop the spread of disease;
3. How sick students will be identified;
4. Transportation plan for sick students;
5. Disease containment measures for the district;
6. Communication plan for staff, students and parents;
7. Continuing education plan for students;
8. Procedures for dealing with student privacy rights;
9. Employee leave procedures during a pandemic flu or other catastrophe;
10. Employee pay and benefit plan and procedures;
11. Facility utilization by other agencies procedures;

12.—Business operations plan for offsite operation or alternative measures.

END OF POLICY

Legal Reference(s):

ORS 192.660(2)(k)
ORS 332.107
ORS 433.260

ORS 433.441

OAR 437-002-0161

OAR 581-022-2030(3)(e)
OAR 581-022-2220
OAR 581-022-2225

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ITEM FOR ACTION AT A FUTURE MEETING (First Read)

Date of Meeting

April 16, 2025

Title

Approve revisions to Board Policy BDDH – Public Comments at Board Meetings

Presenter

Colt Gill, Interim Superintendent

Background:

The proposed revisions to Board Policy BDDH Public Comment at Board Meetings has been placed on the agenda as an Item For Action At A Future Meeting (First Read).

Summary:

Board Meeting Participation & Public Comment: Although board meetings are held in public, *they are not meetings of the public*. The laws governing boards of education require their work be done where the public can observe their actions.

Members of the school board are elected officials entrusted with governing the community's schools. The role of the school board is to ensure that the district is responsive to the values, beliefs and priorities of the community they serve.

The Board may allow public comment at the regular board meeting, but is not legally required to do so.

The Eugene School District 4J Board of Directors has long held the tradition of providing public comment time at their regular board meetings. Receiving comments from the community helps to inform the Board in their deliberations and decision making process. The Board receives and listens to comments from the public, however, the Board does not engage in conversation with members of the public during the course of their board meeting and public comment time.

The COVID 19 pandemic required local elected officials and public bodies to assess how to provide access to public meetings while adhering to local health guidelines. While the Eugene School District 4J Board of Directors has historically included live radio broadcast on KRVM Radio, and provided live stream as part of their board meetings, video access via Zoom webinars was added during the 2020-21 school year. The district website provides information about scheduled board meetings, how to attend board meetings and how to sign up to give public comments. ([Link to district website](#))

House Bill 2560 (2021) updated law governing public attendance and comment at public meetings of the board. When public meetings are held and access is made available in-person, the board must provide, to the extent reasonably possible, an opportunity to access and attend meetings by telephone, video or other electronic or virtual means; if in-person oral testimony is allowed during a meeting, allow

the public to submit oral testimony by telephone, video or other electronic or virtual means; and if in-person written testimony is allowed, written testimony must be allowed by email or other electronic means.

The Oregon School Board Association ([OSBA](#)) provides resources, trainings and guidance to school boards across the state of Oregon. Public Meetings Law is one of the areas that OSBA offers annual training to board members and district leadership. OSBA works closely with the Oregon Government Ethics Commission, Oregon Attorney General’s Office, Oregon Legislature and the Oregon Department of Education. A one-page document provided by OSBA entitled Public Comments at Board Meetings has been attached to this agenda item for reference. In addition, the following links can be a resource for useful information regarding rules for public meetings.

- [Oregon Administrative Rules Chapter 199, Division 50 – Public Meetings Law](#)
- [Oregon Government Ethics Commission – Public Meetings Law](#)
- [Oregon Attorney General’s Public Records and Meetings Manual 2024](#)

OSBA also provides guidance for policy updates. OSBA considers Policy BDDH – Public Comments at Board Meetings a “*Highly Recommended*” policy and the Board is encouraged to review and approve the proposed recommended changes.

Code:	BDDH
Adopted:	10/03/18
Orig. Code:	BBAA

Proposed Revisions Format:

Revised content presented in **RED Font**;
Deleted content presented in **GREEN Font**;
Continuing policy content in **BLACK Font**

Options and Alternatives:

The Board may choose to accept revisions to Policy BDDH as proposed and readopt the policy. The Board may wish to direct staff to make further revisions. The Board has the authority to approve a policy on the “First Read” should they choose to do so

Recommendation

The superintendent recommends the board approve revisions to board Policy BDDH – Public Comment at Board Meetings

Eugene School District 4J

Code: BDDH
Adopted: 10/03/18; XX/XX/XX
Orig. Code: BDDH

Public Comment at Board Meetings

All Board meetings, with the exception of executive sessions, will be open to the public. The Board invites the district's community members to attend Board meetings to become acquainted with the programs and operation of the district. ~~Members of~~ The public ~~also are encouraged to share their ideas and opinions with the Board when appropriate~~ has a right to attend public meetings held in open session. The Board welcomes and encourages the members of the public, including students, staff, families, and community, to share comments, ideas and opinions with the Board during designated times on the agenda.

The Board may conduct meetings without public comment. Oregon's public meeting law is not a public participation law. However, the Board deeply appreciates public input to improve the district's efforts on behalf of students and staff. While the Board will not typically engage in deliberations or answer questions of the public while in session, the Board directors consider all input in their decision making.

~~It is the intent of the Board to ensure communications with individuals with disabilities are as effective as communications with others.~~ Individuals with hearing, vision or speech impairments will be given an equal opportunity to participate in Board meetings and submit written comments to the Board. ~~Primary consideration will be given to requests of qualified individuals with disabilities in selecting appropriate auxiliary aids¹ and services~~ Individuals requesting assistance, aids or accommodations are encouraged to notify the district at least 48 hours prior to the Board meeting with the request, consistent with Board policy BD/BDA – Board Meetings.

~~Auxiliary aids and services for persons with disabilities will be available at no charge to the individual. All auxiliary aids and/or service requests must be made with appropriate advance notice. Should the Board demonstrate such requests would result in a fundamental alteration in the service, program or activity or in undue financial and administrative burdens, an alternative, equally effective means of communication will be used.~~

Audience

~~During a session of a Board meeting open to the public, members of the public may be invited to present comments during the designation portion of the agenda. At the discretion of the Board chair, further public comment may be allowed.~~

Request for an Item on the Agenda

~~A member of the public may request an item for the superintendent's consideration for the agenda of a regular Board meeting.~~

Procedures for Public Comment at Meetings **Procedures for Oral Public Comment**

~~The Board will establish procedures for public comment in open meetings~~ establishes the following procedures for public comment at regular meetings held in open session. ~~The purpose of these~~

~~procedures will be to inform the public how to effectively participate in Board meetings for the best interests of the individual, the district and the patrons. Information will be easily accessible and available to all patrons attending accessing or attending a public such a Board meeting.~~

- ~~1. Discussion or presentation concerning a published agenda item is limited to its designated place on the agenda, unless otherwise authorized by the Board chair. Public comment is limited to its designated place on the agenda as time allows for that agenda item.~~
- ~~2. A person wishing to provide public comment at a board meeting, should submit a request form online by a deadline set by the district administration 48 hours before the meeting. Request forms can be accessed on the district website via this ([Link to district website](#)). Public comment, like meeting attendance, is available either virtually or in person. Up to 10 community members will be scheduled to provide public comment at each meeting, with a 3-minute time limit per speaker. If more than 10 people request to speak, priority will be given to residents who did not provide public comment during the previous two meetings, then the selection of speakers will be determined randomly.¹ A request to give public comment in-person or electronically does not guarantee time will be available.~~
- ~~3. A person speaking during the public comment portion of the meeting may comment on an agenda item or other topic not on the published agenda.~~
- ~~4. A person speaking during the public comment portion of the 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 comments for a common purpose.~~
- ~~5. A person giving public comment is limited to an established time limit of three minutes. Statements should be brief and concise. The Board chair has discretion to waive time limits or extend the overall time allotted for public comment. Additional time will be allocated in a fair and equitable manner across all speakers, giving each an equivalent amount of time. Time limits will be determined based on the number of commenters and the amount of time available for public comment. If a person has more comments than time allows or is unable to comment due to time constraints, the person is encouraged to submit additional written comments to the Board through the district office as directed.~~
- ~~6. Comments and inquiries from the public during the designated portion of the agenda are taken into consideration by all Board directors, but will not typically be responded to by the Board chair or other directors. Inquiries may be referred to the superintendent for reply at a later date.~~
- ~~7. The Board will not typically hear public comment at Board work sessions. However, on occasion the Board may seek public comment on a specific topic of a work session agenda.~~

Procedures for Written Comment

Members of the public may submit written comments or materials to the Board at any time at the district office, by mail or by email to board@4j.lane.edu. Materials or comments submitted at least 48 hours in advance of a Board meeting will be provided to the Board before the Board meeting, but will not be read at the Board meeting.

¹ When in-person attendees are allowed to provide oral comment, virtual attendees will be afforded the same opportunity.

All oral and written public comment will be considered by the Board. The Board Chair or designee may acknowledge written comments, however the Board generally does not respond directly to the public comments and cannot deliberate with the public.

Comments Regarding Staff Members

A person speaking during the designated portion of the agenda for public comment may offer objective comments or criticism about district operations and programs. For complaints about individuals, the district has a board policy (KL-Public Complaints) and complaint process. A commendation involving a staff member should be sent to the superintendent's office.

END OF POLICY

Legal Reference(s):

[ORS 165.535](#)

[ORS 192.610 - 192.690](#)

[ORS 332.107](#)

[ORS 165.540](#)

[ORS 332.057](#)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2020); 28 C.F.R. Part 35 (2020).

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018).

Baca v. Moreno Valley Unified Sch. Dist., 936 F. Supp. 719 (C.D. Cal. 1996).

Leventhal v. Vista Unified Sch. Dist., 973 F. Supp. 951 (S.D. Cal. 1997).

Oregon House Bill 2560 (2021).



Public Comments at Board Meetings

Although Board meetings are held in public, they are not meetings of the public. The board may allow public comment and questions during the meeting but is not legally required to do so.

Best Practices:

- Establish a set time for public comments; for example, the first 10 minutes of every regular meeting (as opposed to special meetings/work sessions). Be consistent in having this on the agenda for every meeting.
- List public comment on the agenda.
- Keep a sign in sheet of speakers. Ask all speakers to sign in. The sign in list is then given to the board chair to call speakers in order of sign up. Alternatively, the chair may group speakers by topic.
- Remind all speakers at the beginning of the public comment period that all comments are expected to be respectful and directed to the board as a whole.
- If the speaker begins to complain about a district employee, the chair should immediately stop the speaker and remind them that such comments are not appropriate and should be addressed through the district's normal complaint process. If the speaker persists, the chair should end their period of comment.
- Set a time limit per speaker; perhaps 3 minutes per individual. Keep time and enforce consistently.
- Decide in advance whether speakers can concede their time to another.
- Board members should not respond to public comments. This is a time for members of the public to express their views.
- Post the district's guidelines for public comment on the district website.

Sample Public Comment Guidelines (District website or printed)

PUBLIC COMMENT SIGN UP (SAMPLE 1)

Public Comment time provides an opportunity for constituents to address the ____ Public Schools Board of Education. We encourage public comments at business meetings and ask that you respectfully follow the meeting guidelines below:

- Public Comment occurs from 5:30 to 6:15 p.m. at the beginning of monthly Board business meetings, which occur on the second Tuesday of each month.
- Each person who signs up to speak should arrive at approximately 5:20 PM.
- During the 45-minute Public Comment period, each registered speaker will have up to 3 minutes in which to address the Board.

- Up to 5 people can register to speak on a specific topic, which allows a diversity of opinions to be presented while being mindful of time. If a large group of people wishes to come to discuss a specific topic, please designate one person to sign up and speak.
- If you have hand-outs or materials for the Board, please present them to the Board's Executive Assistant who will distribute them to the Board members after the meeting.
- Members of the public should remain seated during comments and not approach the dais.
- The Board Chair has full discretion over the Public Comment period, including the ability to manage speaking time to allow for additional comments.

No inappropriate comments or behavior will be tolerated. Inappropriate behavior is defined as attempting to engage individual board members in conversation, insults, obscenities or profanity, attacks against any person in their personal capacity, and/or physical violence or threat thereof.

PUBLIC COMMENT AT BOARD MEETINGS (SAMPLE 2)

Guidelines for communicating with the school board during public comment sessions.

The board generally meets on Monday twice a month, except for the month of July. The meeting calendar is provided to local newspapers. They are held at _____. Public comment periods are held only during the first meeting of each month. That meeting begins at 7:00 p.m.

Tips on preparing to speak to the board:

Your goal for providing a comment should be to raise a specific topic or issue with the school board. Their goal is to listen and learn from the community. They will not respond to testimony that evening. If you would like to speak before the school board, please follow these guidelines:

- Try to resolve any issues with teachers, school principals, or other district personnel before bringing the issue to the board.
- Recognize that the board does not discuss personnel matters at board meetings. Do your homework and understand the basic facts of the issue before addressing the board.
- Prepare an outline of your testimony so that it is well organized and avoids repetition.
- Plan to keep your remarks to three minutes.

Process at the meeting

- Members of the community who wish to speak to the board during the public comment period should sign up before the meeting starts. A sign-up sheet is available at the front-left of the boardroom, usually by 6:45 p.m.
- Please print your name and complete address legibly on the sign-up sheet.
- Pick up an agenda to learn when the public comment period will take place. Listen for any changes in the agenda announced by the board president.
- When the board is ready, the chair will refer to the sign-up sheet and call out the names.
- If a number of people are signed up to speak on the same topic, the board limits the time devoted to a single topic to XX minutes.

Addressing the board

When your name is called, approach the podium. Speak into the microphone, giving your full name and the school attendance area where you live for the record.

Please limit your comments to three minutes.

Be respectful of the board when speaking.

Be ready to respond to questions from the board if asked.

Address your testimony to the board members, not the audience.

Do not address questions to the board. The board's goal for the public comment period is to hear your concerns, comments and opinions.

Example Script for the Chair

The chair should read a passage such as this at the beginning of the public comment period to explain the procedure and establish the expectations of the board:

“Public Comment time provides an opportunity for constituents to address the Acme Public Schools Board of Education. The board has set aside 30 minutes for public comment. The chair will call on individuals who have signed up to provide comment. When your name is called, be seated at the desk and state your name and community of residence for the record. Speakers may offer objective criticism of District operations and programs, but the Board will not hear complaints concerning individual District personnel. Copies of the district complaint Policy KL will be provided on request. Undue interruption or other interference with the orderly conduct of Board business cannot be allowed. Defamatory or abusive remarks are always out of order. The Board Chair may terminate a speaker's privilege of address if, after being called to order, the speaker persists in improper conduct or remarks.”