

# North Clackamas School Board

Thursday, May 27, 2021 6:30 PM

Board Room/Zoom, 12400 SE Freeman Way, Milwaukie, OR 97222

## OPEN SESSION

6:30 Call to Order - Native Land  
Acknowledgement

### Minutes

May 6, 2021 - Governance Meeting

May 13, 2021 - Regular Meeting

### Consent Agenda

#### A. Employment Changes

6:35 Community Requests

6:50 1. NCEA Featured Educators

6:55 2. Lesbian, Gay, Bisexual, Transgender  
and Queer (+) Pride Month - Proclamation

7:00 3. Superintendent's Report

7:10 4. Board Reports

7:20 5. Comprehensive Sexuality Education  
Plan - Discussion

7:40 6. School Resource Officers (SRO) -  
Report

8:00 7. Student Success Act: Student  
Investment Account (SIA) 2021-2023 Plan - Report

8:30 8. Capital Projects Bond Update -  
Report

8:50 Adjourn

**NORTH CLACKAMAS SCHOOL DISTRICT 12  
CLACKAMAS COUNTY, OREGON  
MINUTES — BOARD OF DIRECTORS REGULAR MEETING  
May 6, 2021  
Zoom/Boardroom**

***Governance  
Session***

With due notice having been given and a quorum present, Chair Libra Forde convened open session at 6:07 p.m. with the following members present:

Libra Forde	–	Chair
Mitzi Bauer	–	Vice Chair
Jena Benologa	–	Director
Kathy Wai	–	Director
Orlando Perez	–	Director
Steven Schroedl	–	Director
Tory McVay	–	Director
Matt Utterback	–	Superintendent
Sandra Henderson	–	Board Secretary

Also present were Cindy Detchon, Shay James, and Tiffany Shireman. District employees and community members were provided a live stream on YouTube.

Vice Chair Mitzi Bauer read the Native Land Acknowledgement.

**Board Member Related Policies** – Director Steven Schroedl facilitated a review of the following policies and laws:

- BBAA – Individual Board Member’s Authority and Responsibilities
- BCB – Board Officers
- BH/BHA – Orientation of New Board Members
- BHB – Board Member Development
- ORS 332.005 Directors as district school board - oath
- Public Records and Public Meetings, Oregon Department of Justice

Recommendations for possible revisions to these policies were referred to the Policy Review Committee.

**Board Attendance at Graduation Ceremonies** – Superintendent Matt Utterback shared tentative dates for the 2021 graduation ceremonies. Board members will not be asked to participate in the ceremonies due to Covid-19 safety protocols, but are welcome to attend.

**Live Streaming in Person Board Meetings** – Superintendent Matt Utterback facilitated a discussion with the Board regarding live streaming Board meetings once Board meetings return to fully in person. Board members reached consensus agreement to continue live streaming meetings and to proceed with the installation of the needed technology.

There being no further business to come before the Board, the meeting adjourned at 7:30 p.m.

**Unapproved**

DRAFT

**NORTH CLACKAMAS SCHOOL DISTRICT 12**  
**CLACKAMAS COUNTY, OREGON**  
**MINUTES — BOARD OF DIRECTORS REGULAR MEETING**  
**May 13, 2021**  
**Zoom/Boardroom**

***Executive Session***

With due notice having been given and a quorum present, Chair Libra Forde convened executive session under ORS 192.660 (2)(e) at 6:02 p.m. with the following members present:

Libra Forde	–	Chair
Mitzi Bauer	–	Vice Chair
Jena Benologa	–	Director
Kathy Wai	–	Director
Steven Schroedl	–	Director
Tory McVay	–	Director
Matt Utterback	–	Superintendent
Sandra Henderson	–	Board Secretary

Also present were Cindy Detchon, Shay James, and Rhys Konrad.

**Real Estate** – Assistant Superintendent of Operations Cindy Detchon and Real Estate Broker Rhys Konrad from Macadam Forbes, Inc. discussed a real estate transaction with the Board.

Executive session recessed at 6:06 p.m.

***Open Session***

Chair Libra Forde convened open session at 6:30 p.m. Present, in addition to those at the executive session, were Derrick Brown, Gayellyn Jacobson, Khaliyah Williams-Rodriguez, Libby Miller, Mark Moser, Maureen Callahan, Petra Callin, Shelly Reggiani, and Vivian Garrison. District employees and community members were provided a live stream on YouTube.

Vice Chair Mitzi Bauer read the Native Land Acknowledgement.

R20/21-102

**Minutes** – Kathy Wai moved, Mitzi Bauer seconded the motion to approve the minutes of the regular Board meeting held April 22, 2021. Chair Libra Forde noted that the minutes under Asian Pacific American Heritage Month proclamation didn't have the work islander in it. Motion passed unanimously to approve the minutes.

R20/21-103

**Consent Agenda** – Tory McVay moved, Jena Benologa seconded the motion to adopt the consent agenda as recommended:

**Employment Changes** - Approve employment changes as listed, with a copy of the list made as part of the official minutes, as recommended by the Executive Director of Human Resources:

*Administrative* – appointments, transfer, terminations

*Licensed* – terminations

Motion passed unanimously.

**Community Requests** – None at this time.

**Superintendent's Report** – Superintendent Matt Utterback reported on the status of Covid-19 vaccinations, reopening of schools, and the 2021-2022 budget. Assistant Superintendent of Education Shay James provided a report on the planning for summer learning and enrichment programs. Questions and comments from the Board were addressed.

**Community Use and Rental of District Facilities** – Assistant Superintendent of Operations Cindy Detchon introduced Community Services Director Natalie Whisler who provided an overview of community field and facility use. Results from a field use fee comparison report were shared and facility use fee recommendations were presented for discussion. Chair Libra Forde proposed forming a Board committee to further address questions and interests of Board members.

**Property Easements** – Assistant Superintendent of Operations Cindy Detchon presented two easement resolutions for stormwater drainage and roadway access impacting the property sale of 14721 SE 172<sup>nd</sup> Happy Valley.

- R20/21-104 Tory McVay moved, Steven Schroedl seconded the motion to approve a resolution to grant an easement to allow HV Parklane LLC and future owners use of the 18-inch storm water line, agricultural pond, and other stormwater drainage facilities located adjacent to the property located at 14721 SE 172<sup>nd</sup> Happy Valley. Motion passed unanimously.
- R20/21-105 Tory McVay moved, Steven Schroedl seconded the motion to approve a resolution to grant an access easement to allow HV Parklane, LLC and future owners use of a portion of Stadium Way. Motion passed unanimously.

There being no further business to come before the Board, the meeting adjourned at 8:00 p.m.

**Unapproved**



Code: **BDDH**  
Adopted: 6/19/86  
Revised/Readopted: 1/20/11; 2/24/18  
Orig. Code(s): BDDH

## Public Comment at Board Meetings

All meetings of the Board, with the exception of executive sessions, will be open to the public. The Board invites community members of the district to attend Board meetings so that they may become acquainted with the program and operation of the district. Members of the public are also encouraged to share their ideas and opinions with the Board when appropriate.

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. Primary consideration will be given to requests of qualified individuals with disabilities in selecting appropriate auxiliary aids<sup>1</sup> and services.

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 at least 48 hour 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, alternative, equally effective means of communication will be used as determined by the district.

In order to assure that persons who wish to appear before the Board may be heard and, at the same time, conduct its meetings properly and efficiently, the Board adopts the following procedures and rules pertaining to public comment at Board meetings:

1. Anyone wishing to speak before the Board, either as an individual or as a member of a group, may do so by following the district's guidelines for public comment. These printed guidelines are available at each Board meeting;
2. Any individual desiring to speak will submit their name, address and the group, if any, that is represented; and
3. A speaker should give their name, and the group, if any, that is represented and should limit his/her presentation to three minutes. Time may be extended at the discretion of the Board chair.

### Comments

Speakers may offer objective criticisms of district operations and programs that are of a concern to them. The Board is restricted from hearing, and will not consider complaints regarding any individual district staff member or any person connected with the district.

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<sup>1</sup>Auxiliary aids include, but are not limited to, such services and devices as qualified interpreters, assistive listening systems, note takers, readers, taped texts, Brailled materials and large print.

The Board vests in its chair or other presiding officer authority to terminate the remarks of any individual when those remarks do not adhere to the rules established in this policy.

### **Petitions**

Petitions may be accepted at any Board meeting. No action will be taken in response to a petition before the next regular meeting. Petitions will be referred to the superintendent for consideration and recommendation.

END OF POLICY

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

[ORS 165.535](#)  
[ORS 165.540](#)

[ORS 192.610 to -192.690](#)

[ORS 332.057](#)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2017); 29 C.F.R. Part 1630 (2017); 28 C.F.R. Part 35 (2017).

Americans with Disabilities Act Amendments Act of 2008.

*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).

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

KC - Community Involvement in Decision Making

**PROCLAMATION:**  
**LESBIAN, GAY, BISEXUAL, TRANSGENDER, and**  
**QUEER (+) PRIDE MONTH**

**ACTION**  
Agenda Item #2  
May 27, 2021

**SUPERINTENDENT'S RECOMMENDATION:**

Adopt the proclamation recognizing June as Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) Pride Month in North Clackamas School District.

**ORIGINATED BY:**

Board request.

**BACKGROUND:**

Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) Pride Month is celebrated annually in June to honor the 1969 Stonewall riots. LGBTQ+ Pride Month strives to achieve equal justice and equal opportunity for lesbian, gay, bisexual, transgender, and queer Americans. In June of 1969, patrons and supporters of the Stonewall Inn in New York City staged an uprising to resist the police harassment and persecution to which LGBTQ+ Americans were commonly subjected. This uprising marks the beginning of a movement to outlaw discriminatory laws and practices against LGBTQ+ Americans.

In NCSD, we recognize LGBTQ+ community as more expansive, and as such have note the (+) in recognition of all in the community.

**ATTACHMENTS:**

Proclamation

**PRESENTER:**

Libra Forde, Board Chair



## Lesbian, Gay, Bisexual, Transgender, Queer+ (LGBTQ+) Pride Month in North Clackamas Schools

WHEREAS, North Clackamas Schools shares in the belief that diversity is our greatest strength and our lesbian, gay, bisexual, transgender, queer+ (LGBTQ+) students and staff have the same rights guaranteed to their peers; and

WHEREAS, each year, the month of June honors the 1969 Stonewall riots in Manhattan and the National Education Association has included LGBTQ+ Pride Month in its list of commemorative months since 1995; and

WHEREAS, we believe, like Jason Collins, the first openly gay major American sports athlete who said, "openness may not completely disarm prejudice, but it's a good place to start"; and

WHEREAS, LGBTQ+ youth are almost five times as likely to have attempted suicide compared to straight cis gender youth and each episode of LGBTQ+ victimization, such as physical or verbal harassment or abuse, increases the likelihood of self-harming behavior by 2.5 times on average; and

WHEREAS, a national study found that 40 percent of transgender adults reported having made a suicide attempt, with 92 percent of these individuals reported having attempted suicide before the age of 25; and

WHEREAS, having a gender sexuality alliance reduces a child's risk of attempting suicide by 50 percent and students at schools with gender sexuality alliances experience less bullying around gender non-conformity; and

WHEREAS, federal law guarantees students the right to form gender sexuality alliance clubs where other non-curricular clubs exist and our community is better because of the diversity of our population; and

WHEREAS, inclusion is a core value of our district and the school board is committed to helping end the crisis of suicide in our community by creating a safe and welcoming school district for all students;

NOW, THEREFORE, the North Clackamas School District Board of Directors proclaims June 2021 to be LGBTQ+ PRIDE MONTH and urges our community to join us in celebrating the diverse gender identity and sexual orientation that exists among our students, staff and community.

Adopted this 27th day of May, 2021.

Signed:

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Chair, Libra Forde, School District Board of Directors

<https://www.oregonsuicideprevention.org/community/lgbtq/>

## **COMPREHENSIVE SEXUALITY EDUCATION PLAN**

## **DISCUSSION**

Agenda Item #5

May 27, 2021

### **SUPERINTENDENT'S RECOMMENDATION:**

This data is presented for Board information, discussion and eventual approval of the District's Comprehensive Sexuality Education Plan.

### **REASON FOR BOARD CONSIDERATION:**

The Oregon State Board of Education states that; *each school district board shall provide an age-appropriate, comprehensive plan of instruction focusing on human sexuality education, HIV/AIDS and sexually transmitted infections and disease prevention in elementary and secondary schools as an integral part of the health education.* This Comprehensive Sexuality Education Plan (CSEP) includes the relevant Health legislation and methods NSCD will use to meet all health education requirements.

### **BUDGET IMPACT/SOURCE OF FUNDS:**

No budget impact.

### **BACKGROUND:**

In 2009, the Oregon Legislature passed ORS 336-455 requiring school districts to provide human sexuality education courses in all public elementary and secondary schools as part of health education curriculum. Since that time, Comprehensive Sexuality Education Plans have been required, and subsequently need to be reviewed every two years.

The North Clackamas School District Comprehensive Sexual Education Plan (CSEP) has been developed in accordance with a series of Oregon Senate Bills, Oregon Revised Statutes and Oregon Administrative Rules. This plan primarily encompasses:

- SB 856 (Sex Abuse Prevention Instruction),
- SB 790 (Domestic Violence Education),
- ORS 336.455 (Human Sexuality Education K-12),
- OAR 581-022-1140 (Equal Educational Opportunities),
- OAR 581-022-1440 (Human Sexuality Education),
- OAR 581-022-1210 (District Curriculum, instruction of infectious diseases, including HIV/AIDS and Hepatitis B/C).

There are additional secondary state sources also reflected in this plan, including:

- ORS 339.351-364 (Harassment, Bullying, Cyber-bullying and Intimidation),
- OAR 581-022-0413 (Prevention Education in Drugs and Alcohol),
- OAR 581-022-1510 (Comprehensive Guidance and Counseling),
- SB 79 (CPR Instruction for grades 7-12).

## **COMPREHENSIVE SEXUALITY EDUCATION PLAN:**

Effective health teaching and learning provides opportunities for each student to make sense and deepen their understanding of health, so they can identify, practice and maintain health enhancing behaviors. Content standards, adopted by the State Board of Education, include concepts, accessing information, self management, analyzing influences, interpersonal communication, goal setting, decision making and advocacy.

The Comprehensive Sexuality Education Plan provided here for review emphasizes abstinence, but not to the exclusion of a contraceptive skills-based education. The human sexuality information provided is comprehensive, complete, balanced, medically accurate, age-appropriate, not fear or shame-based, and inclusive as determined by the Oregon Department of Education.

Each grade level states specific content standards regarding human sexuality taken from grade level bands of standards from ODE (Grades K-2, 3-5, 6-8, 9-12). In North Clackamas, we have separated the grade bands into standards per individual grade level. Each grade level includes an introduction summarizing essential information for teachers and parents, which includes the opportunity to view materials prior to instruction and next steps.

The NCS D Comprehensive Sexuality Education Plan 2021-2023 (Draft) follows the adopted plan from May 2019. Our presented revisions include the addition of details to the course descriptions, guidelines for parent involvement, and training for staff along with additional language and school supports for communication with parents and families.

## **ATTACHMENTS:**

- A. [NCS D Comprehensive Sexuality Education Plan](#) (2021-23 Draft)
  - Communication Plan is included as Appendix E
  - Supporting documentation and sample letters are included in Appendix B
- B. [NCS D CSEP Crosswalk Document](#): This list identifies the areas of change from the previously adopted plan.
- C. [Presentation Slides](#) with additional linked artifacts and examples

## **PRESENTER / STAFF CONTACT:**

Maureen Callahan, Executive Director of Teaching and Learning  
Kara Mortimer, Associate Director of Teaching and Learning

Click on Page to Open Document

# K-12 Comprehensive Sexuality Education Plan

North Clackamas School District Guidelines



North Clackamas School District  
Milwaukie, Oregon 97222  
<http://www.nclack.k12.or.us/>

**Revised: May 2021**

**Adopted: November 17, 2016**

# APPENDIX E

## OVERVIEW OF CSEP

### COMMUNICATION PLAN



**Annual Comprehensive Sexuality Education Plan  
K-12 School Communication**

Key Documents:

- [Comprehensive Sexuality Education Plan \(CSEP\) 2021-23 \(DRAFT 4.4.21\)](#)
- District Spreadsheet to log Comprehensive Sexuality Education Plan implementation
  - [2021-22 Log](#)
  - [2022-23 Log](#)
- [Oregon Dept of Ed Letter and Frequently Asked Questions \(FAQs\) Spanish version](#)

2021-23 Timeline	What	Grade Levels	Responsibility
<b>September (Yearly)</b>	<ul style="list-style-type: none"> <li>• District updates beginning of the year communication letters (translated) to families about grade level Comprehensive Sexuality Education and quarterly opportunities for parents/guardians to hear about the CSEP related lessons and materials.</li> <li>• District Updates Opt-Out Form templates (translated) for K-5, 6-8, and 9-12.</li> <li>• District updates K-5 Flyer templates (translated).</li> <li>• District updates a K-5, 6-8, and 9-12 Google Form template for schools/teachers to use for electronic communication.</li> </ul>	<b>K-12</b>	<b>NCSD Office of Teaching and Learning</b>
<b>September (Yearly)</b>	<ul style="list-style-type: none"> <li>• Schools identify a date to share the CSEP information and their plan for communicating CSEP Unit Plan/lessons and materials information with parents/community.               <ul style="list-style-type: none"> <li>○ ***log date on <b>district spreadsheet</b> <a href="#">2021-22 Log</a>    <a href="#">2022-23 Log</a></li> </ul> </li> <li>• Schools/Principal sends out the beginning of the year communication letters, along with dates for reviewing materials and/or plans for how teachers will share CSEP content information.</li> </ul>	<b>K-12</b>	<b>Schools and School Administrators</b>

	<p><b>Methods for Communicating about the Comprehensive Sexuality Education can include:</b></p> <ul style="list-style-type: none"> <li>○ Back-to-School night review of The Great Body Shop materials for K-5.</li> <li>○ Back-to-School night process for sharing the course syllabus and CSEP unit plan for 6th grade science and Health courses.</li> <li>○ Instructions on how parents can review any online materials and online texts.</li> <li>○ Information on how parents/guardians can expect to receive on-going communication about content and lessons aligned to the sexuality education plan: Newsletters, District K-5 communication letters, Course Syllabus (gr 6-12), CSEP Unit Plans, teacher websites, teacher Google Classroom postings, etc.</li> </ul>		
<p><b>At the new Quarter/ Semester (whenever courses and health enrollment changes for grade 7-12) and prior to CSEP Lessons (all grades)</b></p>	<ul style="list-style-type: none"> <li>● K-5 schools send out letters or flyers about upcoming lessons from the Great Body Shop. This includes information about the content, how to opt out of lessons, and a note about the student booklets that are sent home with the associated content.</li> <li>● K-12, send communication reminders and opt out form/process information several weeks prior to any comprehensive sexual education instruction.</li> <li>● Teachers (grade 6-12) post their CSEP Unit Map and/or Health syllabus on their teacher website at the beginning of the year and send home communication through Synergy, Google Classroom, or other mode sharing their syllabus and unit plans each time a new course begins (quarter, semester, yearly).</li> </ul>	<p><b>K-12</b></p>	<p><b>School administrators and classroom teachers</b></p>
<p><b>After each K-5 Unit aligned to the CSEP</b></p>	<p>Log Opt-Out and additional information on the <b>district spreadsheet</b> <a href="#">2021-22 Log</a> <a href="#">2022-23 Log</a></p>	<p><b>K-5</b></p>	<p><b>Grade level teams/ classroom teachers</b></p>
<p><b>At the end of each quarter or semester for grades 6-12</b></p>	<p>Log Opt-Out and additional information on the <b>district spreadsheet</b> <a href="#">2021-22 Log</a> <a href="#">2022-23 Log</a></p>	<p><b>6-12</b></p>	<p><b>6th grade science and 7-12 Health Teachers</b></p>

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# APPENDIX B

## NCSD DOCUMENTATION AND EXAMPLE FORMS FOR CSEP COMMUNICATION

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- I. Beginning of the Year Letters (District Created, Distributed by Schools)
  - A. 2021-23 Beginning of the School Year Letter, K-8 ([EXAMPLE](#))
  - B. 2021-23 Beginning of the School Year Letter, High School
  - C. [2020 Letter examples and translation templates](#)
  
- II. Opt-Out Resources ([2020 K-12 Generic Example](#))
  - A. Specific to K-5, GBS Units (5,6,8) [Example from Unit 6 for 2020-21](#)
  - B. K-5: Units 5 and 6 Vocabulary and Image Overview Slides [SLIDES LINK](#)
  - C. [Generic K-12 Opt-out form- Printable](#)
  - D. [Generic K-5 Opt-Out Google Form](#) (Example)
  - E. Generic Google Form for grade 6 Opt-out
  - F. Generic Google Form for grade 7-8 Opt-out
  - G. Generic Google Form for grade 9-12 Opt-out
  - H. [Flyers used to share Google Link for Opt-Out in 2020-21](#)
  
- III. K-5 Family Communication Letters for The Great Body Shop lessons ([2020 Example](#) and a [Spanish Example](#))
  
- IV. Curriculum Maps and/or examples of course syllabi and CSEP Unit Plans
  - A. [K-5 CSEP Lessons \(2020-21\)](#)
  - B. [Grade 6 in Science](#)
  - C. [Grade 7 and 8 Health](#)
  - D. High School Health

## NCSD CSEP Crosswalk: **Changes for 2021-2023**

[Background Information:](#) What is the CSEP? Why do we need one? What was the process used to get feedback and revise the CSEP?  
[2019-2021 Adopted Comprehensive Sexuality Education Plan](#)

<a href="#">K-12 Comprehensive Sexuality Education Plan: NCSD 2021-23</a>	<u>What is this section?</u>	<u>Description of Changes (from the 2019-2021 Plan)</u>
➤ <b>EXECUTIVE SUMMARY</b>	This is the initial summary that lays out the laws (OARS, ORS, Senate Bills...) and ODE standards and the requirement for each district to have a school board adopted Comprehensive Sexuality Education Plan (CSEP). This section connects legislation to content and instruction.	<b>This section remains unchanged from the 2019 CSEP.</b>
➤ <b>STATE OF OREGON LEGISLATION REGARDING COMPREHENSIVE SEXUALITY EDUCATION</b>	Resources from ODE outlining the work completed at the state level that supports the Comprehensive Sexuality Education Plan	One link added
➤ <b>INTRODUCTION</b>	This section connects the ODE laws, standards, and expectations to the timeline and processes NCSD used to create, expand, and implement our CSEP.	Changes made to reflect the adoption date in 2019. Addendum added to describe the current CSEP revision process and what was shifted based on what we learned in Comprehensive Distance Learning (CDL)
➤ <b>NCSD IGAI POLICY: HUMAN SEXUALITY, HIV/AIDS, SEXUALLY TRANSMITTED INFECTIONS, HEALTH EDUCATION GUIDELINES</b>	Here is the list of Board approved plans of instruction, content, and skills for Health Education, specifically the health and sexuality aligned classroom content. Established the focus and intent for the sexuality education program in NCSD.	<b>This section remains unchanged from the 2019 CSEP.</b>

<p>➤ <b>NCSD COURSE DESCRIPTIONS AND ODE HEALTH SEXUALITY EDUCATION STANDARDS</b></p>	<p>Provides a list, by grade level, of the State Standards in Health that are connected sexuality education. Each grade level course description has an introduction to the standards and a description for how NCSD will communicate information with parents and provide access to the materials used for instruction. These course descriptions are available in the CSEP, with materials reviews, and are often paired with the beginning of the year District Letters that are shared with parents/guardians.</p>	<p><b>K-6</b> Course Descriptions were edited for general understanding and alignment with the 2021 plan. The correct link to the district webpage was added.</p> <p><b>7-8</b> The adopted text, <u>Glencoe Teen Health</u>, is called out specifically. The commonly used <u>My Future, My Choice</u> is added to the course description. The corrected NCSD webpage link is added. There are general edits for alignment with the 2021 plan.</p> <p><b>9-12</b> The adopted text, <u>Glencoe Teen Health and Healthy Relationships</u>, is called out specifically. The lesson resource from <u>Learning for Justice (formerly Teaching for Tolerance)</u> is added to the course description based on teacher feedback that the text does not have enough content to meet the standards. It has been common practice in high schools to have guest speakers, but that information is not included in previous course description. The update includes <u>Clackamas Women's Services</u> as a resource for guest speakers as it is already listed in the <u>Guidelines for Training</u>. The corrected NCSD webpage link is added. There are general edits for alignment with the 2021 plan.</p>
<p>➤ <b><u>COMMUNICATION AND GUIDELINES FOR OPT-OUT</u></b></p>	<p>This is an example of the Beginning of the Year letter that is translated at the district level and sent home by schools. This communication is often paired with the course descriptions and the standards in the same communication.</p>	<p>Updated links to websites Connections from this section to support materials in Appendix B and Appendix E.</p>

<p>➤ <a href="#"><u>GUIDELINES FOR PARENT/COMMUNITY INVOLVEMENT</u></a></p>	<p>This section is designed to outline 1) how schools can communicate to parents/guardians/community and 2) how community members can get information and communicate back to schools.</p>	<p>Edits here offer an increased list of methods to involve community and parents in discussions and giving feedback in the upcoming 2 year cycle.</p>
<p>➤ <a href="#"><u>GUIDELINES FOR TRAINING INDIVIDUALS WHO WILL BE TEACHING COMPREHENSIVE SEXUALITY EDUCATION</u></a></p>	<p>As the title indicates, this section is about who teaches what and how do they get the information and training in order to create the best possible learning environments for CSEP Lessons.</p>	<p>Professional Development specifies need for teacher support.</p> <p>For secondary Health, <a href="#"><u>Learning for Justice</u></a> (formerly Teaching for Tolerance) and <a href="#"><u>My Future, My Choice</u></a> are both listed to match the resources identified in the <a href="#"><u>NCSD Course Descriptions</u></a>.</p>
<p>→ <a href="#"><u>APPENDIX A: ODE SEXUALITY EDUCATION FREQUENTLY ASKED QUESTIONS</u></a></p>	<p>FAQ from ODE</p>	<p><b>This section remains unchanged from the 2019 CSEP.</b></p>
<p>→ <a href="#"><u>APPENDIX B: NCSD DOCUMENTATION AND EXAMPLE FORMS FOR CSEP COMMUNICATION</u></a></p>	<p>The goal is to update and create a section for documents, forms and templates so that they are all found in one place. With the shift in staff, the interim changes in the Assoc Director position, and the experiences from CDL, links and documents are found in TOO many places and this is an effort to organize and streamline resources.</p>	<p>This is a new section. The artifacts and links provided April/May 2021 are examples of documents and forms used 2019/21. The expectation is that these will be updated as the updated forms aligned to the 2021/23 plan come available.</p>
<p>→ <a href="#"><u>APPENDIX C: SEXUALITY EDUCATION INFORMATIONAL SHEETS</u></a></p>	<p>These are materials from Oregon Attorney General's Sexual Assault Task Force (SATF) and Oregon Department of Human Services.</p>	<p><b>This section remains unchanged from the 2019 CSEP.</b></p>
<p>→ <a href="#"><u>APPENDIX D: OVERVIEW OF ODE K-12 COMPREHENSIVE HEALTH STANDARDS</u></a></p>	<p>These are the standards as shared from the Oregon Department of Education.</p>	<p><b>This section remains unchanged from the 2019 CSEP.</b></p>

<p>→ <a href="#"><u>APPENDIX E: OVERVIEW OF NCSD CSEP COMMUNICATION PLAN</u></a></p>	<p>This is an outline of who does what, and when in terms of communication related to the Comprehensive Sexuality Education Plan and the aligned content and lessons that occur in the classroom.</p>	<p>The section is new in the table of contents while the document has been a part of the CSEP for at least 2 years.</p> <p>The communication plan has been reorganized by chronology and department/school responsibility. Some of the edits come from our learning during CDL and suggestions for how to make communication more efficient.</p>
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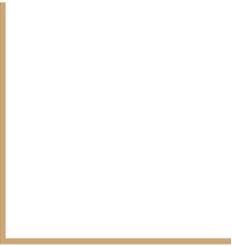
# Comprehensive Sexuality Education Plan

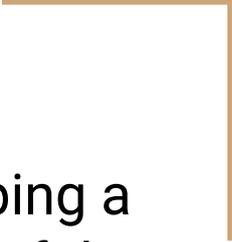
Presented to NCS D School Board  
for Renewal/ Approval  
May 27, 2021





# Background Information





Each school district in Oregon is responsible for developing a Comprehensive Sexual Education Plan (CSEP) as a part of the Kindergarten through 12th grade Health instructional program. The CSEP is reviewed and approved by each school district's local school board every two years.



The North Clackamas School District Comprehensive Sexual Education Plan (CSEP) has been developed in accordance with a series of Oregon Senate Bills, Oregon Revised Statutes and Oregon Administrative Rules.

# OARs and ODE Guidance that form the basis for the NCSD Comprehensive Sexuality Education Plan

## [The Human Sexuality Education Law](#) (2009)

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This act set the stage for Comprehensive Sexuality Education in Oregon.

## [The Healthy Teen Relationship Act](#) (2013)

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This act includes teen relationships and violence in teen relationships into health education and asks districts to include this violence as a part of any harassment and bullying policy.

## [The Child Sexual Abuse Prevention Law /Current Sexuality Education Law](#) (2015)

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Requires comprehensive, age-appropriate, medically accurate sexuality education. This includes instruction related to child abuse prevention, healthy relationships, gender identity, and goal setting.

## [Erin's Law](#)

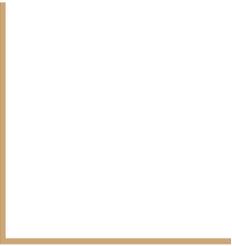
July of 2015 from SB 856

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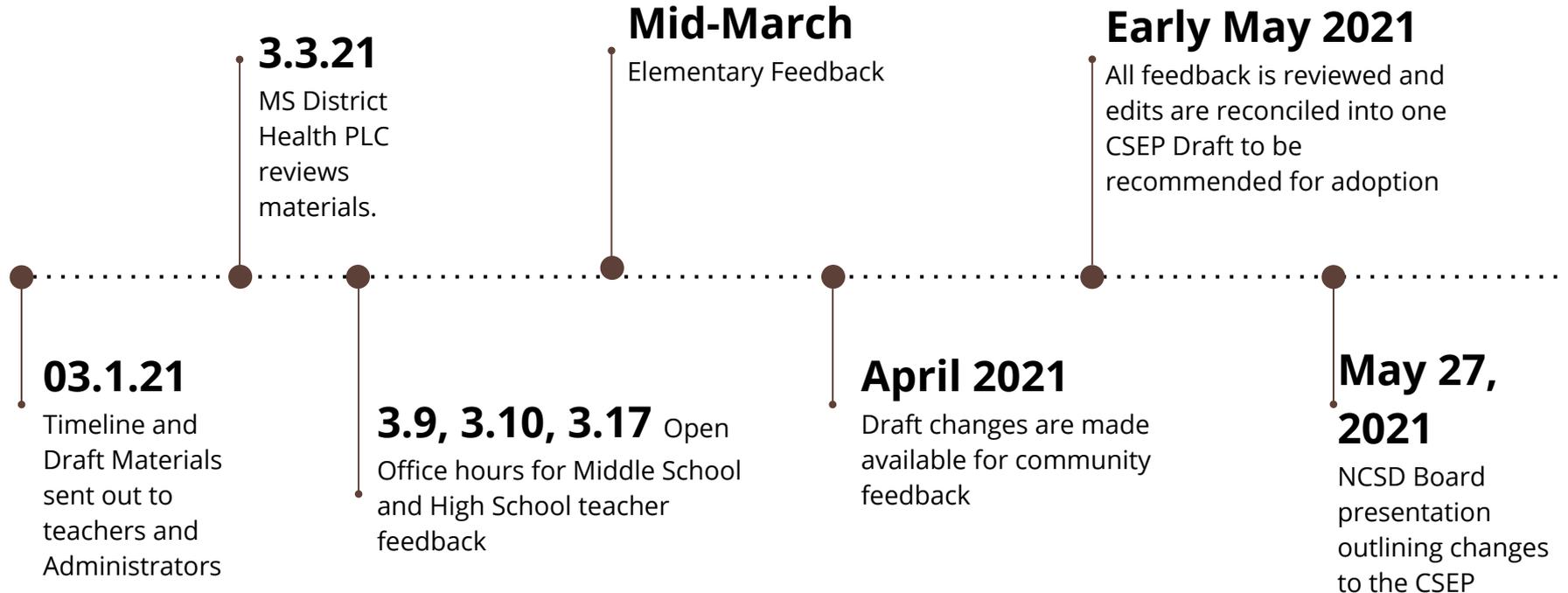
The focus of Erin's Law includes healthy relationships and consent. Requires every board to adopt child sexual abuse prevention instruction K-12.



# Timeline and Process for Revision



# Timeline for CSEP Revision and Approval



# Original Documents

This is the CURRENT NCSD CSEP and associated communication plan.

Please refer back to these documents to see the document as a whole. I did not include the Executive Summary and the supporting Documents from ODE in the parts to be revised (next slide) since the changes in those sections will be minimal.

2019-2021

[NCSD Adopted  
Comprehensive Sexuality  
Education Plan \(May 2019\)](#)

[Communication Plan- CSEP  
2020-2021 \(old format,  
some updates to  
accommodate CDL\)](#)

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# Draft Documents and Suggestions for Revision Process



## Edit

Teachers and administrators were asked to look over the sections of the CSEP that are most connected with their grade level. Use the comment feature to highlight sections and make suggestions.

Principals shared a letter with families regarding the CSEP along with information about how to review and provide feedback.

This information, along with a Google Form for Feedback can be found on the Teaching and Learning website.

[Draft 2021-2023 NCSD  
Comprehensive Sexuality  
Education Plan](#)

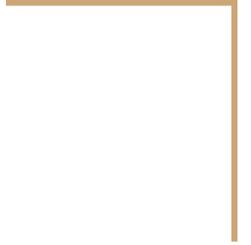
[Crosswalk document highlighting  
the areas in the draft that have  
the most revision or addition](#)

[Google Form for feedback](#)

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2021-2023

# Communication



# Example Communications Regarding CSEP and the lessons aligned to the NCSD Plan and ODE Standards

## District Letters (K-12)

Unit Flyers with Unit Letters, Content Information (K-5)

- [K-5 Health Curriculum Map, Unit 5 Flyers](#)

Upcoming Content in This Course (6-12)

- [Example Health Unit Map gr 6](#)
- [Example Health Map Gr 7 & 8](#)
- [6-12 Letter to Parents](#)

Parent Communication for Principals to Share

- [Letter about Health Units and previewing materials](#)

Feedback: So, What did we hear?



# Elementary

No Direct Comment on the Draft CSEP besides review team members.

Clear feedback on communication and content support for lessons:

- The content created this year for the website and and teacher-led lessons was very helpful.
- Need materials to share with parents so that they can make informed decisions about opting out of content: what do the pictures and videos look like? What vocabulary will be used?

# Middle School

Middle School teachers reported that CDL and quarterly classes had an impact on communication with students and parents.

- Need clarification on who is responsible for sending home letters and how we communicate with parents.
- Would like the option for a translated Google Form for opt-out like what was available for K-5 this year.

# High School

- Teachers report a good system for sharing the content of the class through their course syllabus and a unit outline and that will probably continue.
- HS Teachers would also like support in a translated Google Form to use as a way to get opt-out information.
- It was reported that our adopted text does not have the materials and content to meet all of the required standards called out in the CSEP and we need to include that we use community partners to help us with this.

# Parents

Overwhelmingly, parents report that there was SO much communication to keep track of this year that they did not pay much attention to the longer district letters.

- They want information from the teacher: What is being taught and when?
- Some clarification beyond a list of topics available on the Unit letters.

There were 2 questions about curriculum content in grade 1 not related to the revision of the CSEP. Teaching and Learning is examining materials and providing options to teachers as a result.



# Proposed Changes

# Course Descriptions

- For each Grade Level, this draft specifies the adopted curriculum material within the course description.
- For Grades 6, 7 and 8, and high school, the commonly used resources and materials are identified by name or source.
- Plan provides clarity and connection by informing parents that they are encouraged to connect with the classroom teacher and/or the school administrator to review resources and materials used to provide content instruction.

# Guidelines for Parent Involvement

- ADDED: NCSD will ask parents for feedback on Health education yearly. (This is common in adoption years.)
- ADDED: NCSD to develop a quarterly opportunity to discuss health lessons and content with K-5 parents. The Health and Wellness team would lead these informational sessions.

# Training Guidelines

- Maintain and support professional learning opportunities to share content materials and lesson implementation ideas.
- Create a system for materials review and guidance for new teachers and teachers new to a grade level.
- Continue to develop comprehensive curriculum maps for grades 7-12 and collaboratively refine and implement content.

# Communication

- Edited the Communication Plan (Appendix E) for clarity on roles and responsibilities.
- Created a library of resources related to the CSEP. Link any public facing documents into the CSEP (Appendix B)
- Builds on systems created in CDL and Hybrid learning to provide:
  - Multiple methods of communication
  - More than one system for collecting opt-out information
  - Provide content clarity to students and families

# Questions and Comments



## **SCHOOL RESOURCE OFFICERS (SRO)**

**REPORT**  
Agenda Item #6  
May 27, 2021

### **SUPERINTENDENT'S RECOMMENDATION:**

This data is presented for Board information.

### **BACKGROUND:**

School districts and local law enforcement agencies around the country have a variety of models for working together. North Clackamas School District Policy KN reads “The Board recognizes that districtwide cooperation with law enforcement agencies is essential for the protection of staff and students, for maintaining a safe environment in district schools and for safeguarding district property.”

For over two decades, each North Clackamas School neighborhood, comprehensive high school and its feeder middle and elementary schools have generally had access to a School Resource Officer (SRO).

Milwaukie High School's assigned SRO is a member of the Milwaukie Police Department. Rex Putnam High School's and Clackamas High School's SROs are members of the Clackamas County Sheriff's Department. (It should be noted that during the 2020-2021 school year this model was not entirely in place due to the COVID-19 pandemic, law enforcement staffing levels and students' primary instruction being delivered online and not in person for the majority of the school year.) A sample Intergovernmental Agreement between NCSD and its law enforcement agency partners is attached.

It has been a number of years since the school district has reviewed the SRO Program from a variety of stakeholders' viewpoints. Greater community understanding of racial and social justice issues and the intersectionality with law enforcement makes this an appropriate time to review the district's SRO Program and surface any recommended changes to North Clackamas School District's practices.

This presentation will review key components and analysis from an SRO program review conducted over the past five months. Education Through Engagement, LLC provided consulting services to NCSD and conducted community-based knowledge facilitation processes. Through multiple engagement processes, the consultant sought to collect data and analyze the information regarding the SRO Program in NCSD through an equity lens.

Interviews, Thought Exchange, and focus groups were conducted incorporating various viewpoints: students, parents, community groups and administrative, certified, and classified staff groups.

### **ATTACHMENTS:**

- A. NCSD School Resource Officer Programming Report, dated April 30, 2021
- B. NCSD School Resource Officer PowerPoint Presentation
- C. NCSD Sample Intergovernmental Agency Agreement, School Resource Officer

**PRESENTER / STAFF CONTACT:**

Shay James, Assistant Superintendent of Education

Tammy O'Neill, Associate Director of High School and Athletic Programs



**North Clackamas School District  
School Resource Officer  
Program Evaluation Report**

Prepared for: NCSD

Prepared by: Lisa Collins, Education Through Engagement, LLC

April 30, 2021

## SCHOOL RESOURCE OFFICER PROGRAM EVALUATION

### Program Evaluation Objectives

Education Through Engagement, LLC provided consultation services to North Clackamas School District (NCSD) to review the School Resource Officer (SRO) program through the NCSD equity lens. A variety of opportunities were provided to solicit information regarding the experiences and input of staff, students and families. Intentional outreach to members of historically underrepresented communities was conducted.

Questions sought information in regards to stakeholder understanding of the role of the School Resource Officer, as well as feedback and suggestions for their work in schools. Implications for school staff and officer training, structures to aid accountability and growth, and the need for on-going community engagement and feedback, surfaced through the exchanges.

### Process Utilized

This report relies on a multi-method approach to collecting and analyzing data relevant to the use of School Resource Officers in NCSD. The data sources include individual and focus group interviews, survey results, and document review.

### Interview Data

The evaluator conducted twenty-eight one-on-one interviews and eleven focus groups with North Clackamas School District stakeholders and one key informant interview with an SRO outside of NCSD. Interviews lasted between 45 and 90 minutes, included detailed notes taken in real time, and were supplemented by email correspondence.

Interviews with individuals and focus groups included a wide range of staff members identified by the district. These included: high school coordinators and engagement specialists at the district level; high school, middle school, and elementary school administrators; licensed elementary and secondary staff from across the district, and POC (People of Color) Educator Group. For licensed staff, the district provided a randomized list at the request of the evaluator; the evaluator invited staff on the list, and participation was voluntary. NCSD leadership, licensed staff, and support staff answered the following questions:

- Who calls an SRO when needed?
- Why is the SRO called?
- What is the role of the SRO?
- What helps an SRO to be successful?

Focus groups were conducted online with students and parents utilizing randomized lists stratified by race/ethnicity from across the district; participation was voluntary. Consistent themes of questioning, adjusted for age, were applied for each group.

Students answered the following questions:

- What is your experience with School Resource Officers?
- What role should School Resource Officers play in our schools? What would help or does help the success of School Resource Officers?

Parents answered the following questions:

- What role should School Resource Officers play in our schools?
- What would help or does help the success of School Resource Officers?

Finally, to provide context for the project, the evaluator conducted a key informant interview with an SRO from the state of Washington. This SRO was chosen because of his expertise and identified through personal relationships. The interview lasted 90 minutes.

### **Survey Data**

Survey data was solicited through the Thought Exchange analysis tool. The Thought Exchange asked the following question:

What aspects and impacts of having School Resource Officers (SROs) at our schools do you feel NCSD should consider? Please focus your responses on those impacts, such as student safety, student mental well-being or positive voice interactions and why they are important.

The Thought Exchange was sent district-wide and in multiple languages to staff, students, parents, and community stakeholders. A total of 1,752 people responded, 1948 thoughts and 53,485 ratings were collected.

### **Document Review**

Finally, the evaluator reviewed relevant NCSD and external documentation. This included the intergovernmental agreement between NSCD and the Clackamas County Sheriff's Office and relevant national research.

All data and analyses were used to address the following:

1. What are the considerations that surface when applying the NCSD Equity to the use of School Resource Officers in our schools?
  - Does this decision align with the District mission/vision?
  - What systems of oppression might exist within this situation?
  - Whom does this decision affect both positively and negatively?
  - Does the decision being made ignore or worsen existing disparities or produce other unintended consequences?
  - Are those being affected by the decision included in the process?
  - What other possibilities were explored?
  - Is the decision/outcome sustainable?

2. What is the level of understanding of the role of a School Resource Officer in the community?

3. What are the experiences of the NSCD community in regards to the School Resource Officers?

Session notes were analyzed within interview or participant type for themes and cross-analyzed across groups for confirmation and refinement.

## Summary of Results

Stakeholders recognized a successful School Resource Officer as being highly skilled at relationship building and trained in areas pertinent to childhood development, trauma informed care, de-escalation techniques and restorative justice practices. The selected officer has chosen to work with school age children, is empathic and approachable, and exhibits a commitment to anti-racist actions. Themes that emerged include:

- The importance of School Resource Officers in maintaining school safety, especially in regards to their involvement in threats of harm and violent situations.
- The need to acknowledge the overrepresentation of students of color in interactions with police and the resulting continuation of the school to prison pipeline.
- The School Resource Officer's role as a community member; pursuing relationships with staff, parents and students through outreach, support and educational opportunities.
- The need for clear delineation of roles of school staff and the school resource officer.
- The various training needs of school resource officers and school staff.
- The role of School Resource Officer as a social service referral source and provider.
- Concerns regarding the potential for unsafe police behavior in schools.
- School Resource Officers interactions as an invitation for positive interactions, leading to improved relationships between police and the community.

## Application of the North Clackamas Equity Lens

The following are in consideration of current and pending policy, services, and practices:

- Does the utilization of School Resource Officers in schools align with the District mission/vision?
- The NCSD recently revised the intergovernmental agency agreement with the Clackamas County Sheriff's office and City of Milwaukie Police Department. This vital step provides for learning environments that articulate relationships with partnering agencies and affords the tools, structures and support needed to meet the district's mission and vision.
- "We pursue strong relationships with families and volunteers, and we work to form strategic partnerships with local organizations and businesses. Together, we remove barriers to student achievement and build bridges for a stronger community." -NCSD District Mission & Strategic Direction

The intergovernmental agreement includes the following language:

- The characteristics of an NSCD SRO: The SRO is empathetic and knowledgeable in equity and diversity issues, juvenile restorative justice principles, and trauma-informed investigatory practices.

The purpose of the NSCD School Resource Officer, including:

- Promoting safety in and around the school by using crime prevention strategies geared toward positive student behavior;
- Building trust and respect between law enforcement and students by mentoring and providing guidance, and connects students to resources to resolve concerns affecting youth safety and security;
- Working collaboratively with school staff and administrators, and community stakeholder groups;
- Supporting school in emergency management.

The role of SROs in student management: School administrators and teachers are solely responsible for school discipline. The SRO is not involved with enforcement of school rules or disciplinary infractions unless they are also violations of law.

**SRO Duties, including:**

- Establishing rapport and relationships with students;
- Working closely with school staff and administrators to identify and provide preventive assistance and services to students and families;
- Presenting information on law enforcement and related criminal justice topics to relevant classes, student assemblies, and clubs;
- Making presentations to stakeholder groups regarding the operations of the Sheriff's Office and the School Resource Officer Program.

NCSD staff, including school administrators, Deans of Students, and counselors, will benefit from training and support structures aligned to the expectations, guidelines and procedures in regards to the engagement with law enforcement agencies.

In addition to the intergovernmental agreement, this work will align with and utilize:

- [KN-AR1 Relations with Law Enforcement Agencies](#)
- [KN-AR2 Investigations Conducted on District Premises](#)

What systems of oppression might exist within NCSD SRO Programming?

- SRO Programming in NCSD has made positive steps by creating the current intergovernmental agency agreement with Clackamas County and the City of Milwaukie. Additional agreements are needed for all law enforcement agencies that collaborate within the school district to articulate their role clearly.

Whom does NCSD SRO Programming affect both positively and negatively?

- School Resource Officer utilization, without clear intergovernmental agency agreements, systems for collecting SRO interaction data, and district guidelines, procedures and training has the potential to negatively affect marginalized students, including special education and lower socioeconomic status groups.
- The development of guidelines for the utilization of SRO services will serve to provide support for school staff as well as accurate, transparent, and consistent safety information for parents, students, and other stakeholders.

Does the NCSD SRO Programming ignore or worsen existing disparities or produce other unintended consequences?

- NCSD's utilization of School Resource Officers, as it currently exists, does not provide clear guidelines and accountability tools and review structures for agency and school leadership. These practices are concerning and, if unattended, will continue to worsen and produce unintended consequences.

Are those being affected by NCSD SRO Programming included in the process?

- The NCSD SRO review project included NCSD students, parents, staff and stakeholders. The NCSD SRO Program would benefit from regular input from stakeholders including empathy interviews of students interacting with officers, a committee of advising community members, and recurring feedback collection.
- This information should be used to measure and articulate the connections of NSCD staff with law enforcement. Further, a designated NCSD staff liaison should be assigned to assist collaboration with partner agencies. This additional district support will enhance relationships and encourage coordinated problem solving while improving practices and strengthening interagency relationships. Maintenance

## EDUCATION THROUGH ENGAGEMENT, LLC

of promising practices should be done utilizing an equity based analysis of student achievement and discipline data.

What other possibilities were explored?

- NCSD continues to enhance supports for students including:
  - Mental Health Provider Support (Measure 98: Western Psychological Services);
  - Drug/Alcohol Counselors and Support (Measure 98: Western Psychological Services);
  - Behaviorists with extensive mental health training (special education department);
  - Social Workers (Student Investment Account addition pending);
  - Partnerships with Community-Based Organizations (various providers).

Is the NCSD SRO Programming sustainable?

- Improvement recommendations can ensure equitable steps toward creating an organizational culture that meet the needs of all students and learning communities.

### Recommendations

- Create an intergovernmental agreement with each SRO entity.
  - An Intergovernmental Agreement between NSCD and all law enforcement agencies is needed. This has been completed for City of Milwaukie Police Department (Milwaukie High School), Clackamas County Sheriff's Office (Rex Putnam High School and Clackamas High School) and is being developed with the City of Happy Valley (Adrienne C. Nelson High School).
- Enhanced community, staff, and student education regarding the School Resource Officer program including their roles, the goals for community engagement and support, and available services for families.
  - The NCSD community, staff, students, and parents would benefit from public educational information regarding the SRO's role. The definition of the SRO role inside the school district's boundaries should be transparent to all stakeholders. This branding of the position from the school district can diminish inaccurate narratives and set expectations for school climate.
- Outline SRO guidelines and provide advanced training for NCSD staff and officers.
  - The newly revised intergovernmental agreements have addressed the need to provide clear, consistent guidelines, structures, and accountability for NCSD leadership and staff. Additional gaps should be addressed through staff and officer training, application of systematic communication and intervention systems, and frequent review of stakeholder feedback and student involved data.

Provide additional resources available on the school campus.

- A clearly defined law enforcement scope of work should be understood and utilized across schools and departments. Systems of support should be used to address student challenges outside these designated roles.
- Increased mental health services, including treatment for drug and alcohol addiction, are available to students. Placement of school based social workers across the K-12 system is pending. As a comprehensive system is built, it is important to evaluate all current and new academic and behavioral supports for efficacy.

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Create a NCSD SRO committee that includes student engagement.

- NCSD would benefit from accountability systems including a community advising committee composed of students, parents, staff and stakeholders.

Ensure data collection on SRO engagement.

- NCSD would benefit from data collection and analysis of SRO engagement within the school district, disaggregated by school, race/ethnicity, sexual identity, special education and age.

Facilitate NCSD leadership and school staff engagement in collaboration on the interagency relationship and management of the system.

- Policies and practices operationalizing the intergovernmental agreement expectations and the derived relationship between school resource officers, school staff and students should be clearly communicated and supported in each school. Leadership development should include collaborative application of guiding documents, implementation practice utilizing equity based, anti-racist problem solving approaches, and reflective analysis of situation resulting in SRO involvement.

All school resource officers should receive basic and advanced training to safely support the learning environment.

- The NCSD should provide training for the NCSD SRO for successful understanding of district initiatives and organizational approaches to the following:
  - District culture, mission, and strategic plan overview;
  - Equity Training;
  - Mental Health;
  - Students with disabilities needs;
  - Trauma Informed Practices.

In conclusion, the NCSD School Resource Officer program evaluation can be utilized to ensure equitable steps toward creating organizational culture that meets the needs of all students and learning communities.

Lisa Collins

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Lisa Collins, Evaluator

Education Through Engagement, LLC

<https://www.educationthroughengagement.com>



# North Clackamas School District

## School Resource Officer (SRO) Program Evaluation Report

# Objective and Overview

Education Through Engagement, LLC provided consultation services to North Clackamas School District (NCSD) to review the School Resource Officer (SRO) program through the NCSD equity lens.

A variety of opportunities were provided to solicit information regarding the experiences and input of staff, students and families. Intentional outreach to members of historically underrepresented communities was conducted.



Dr. Lisa Collins

Owner and Director of Education  
Education Through Engagement, LLC

# Feedback Collected

## Data sources:

- 28 Individual Interviews
- 11 Focus Groups
- 1752 participants in a Thought Exchange

## Feedback collected from:

- Staff, students, families
- Special education services
- Student leadership and affinity groups
- Parent leadership organizations
  - Including culturally specific
- Classified and certified staff

## **THOUGHT EXCHANGE**

*What aspects and impacts of having School Resource Officers (SROs) at our schools do you feel NCSD should consider? Please focus your responses on those impacts, such as student safety, student mental well-being, or positive police interactions, and why they are important.*

# Stakeholder Feedback

A *successful* School Resource Officer is highly skilled at:

- Relationship building
- Understanding of childhood development
- Trauma informed care
- De-escalation techniques
- Restorative justice practices.
- Empathic and approachable
- Commitment to anti-racist actions.

# Themes

Themes emerged around several topics:

- School violence prevention
- The impact of police presence on our communities of color
- Clear communication regarding the SRO roles
- SRO support in the context of a larger system of support
- Training, professional development, protocols, and process

# Recommendations

- Intergovernmental Agreements
- Communication regarding SRO roles, goals of the program.
- Training for SROs
- Resources for students and families.
- Committee, with feedback loop
- On-going community input
- Continuous data collection and review
- Guidance regarding SRO roles and involvement for schools

# Revised Intergovernmental Agreement

The agreements with the City of Milwaukie Police and Clackamas County Sheriff now identifies:

- The characteristics of an NSCD SRO
- The purpose of the NSCD School Resource Officer
- The role of SROs in student management
- SRO Duties
- Professional Development & Training required
- Refers to our NCSD policies as the primary driver

# Next Steps

Increased services available to schools, students, and families

- Mental Health Provider Support
- Drug/ Alcohol Counselors and Support
- Social Workers, Engagement Specialist, and Community Liaisons

Defined process and roles across schools

Data collection and review process

Community outreach expectations for officers

# Professional Development & Alignment

Training for School Resource Officers including:

- District culture, mission, and strategic plan overview;
- Equity Training
- Mental Health
- Special Education Student Needs
- Trauma Informed Practices

Student Management Committee

- Review and align practices and protocols

# Questions



**INTERGOVERNMENTAL AGREEMENT  
BETWEEN CLACKAMAS COUNTY  
AND THE NORTH CLACKAMAS SCHOOL DISTRICT**

THIS AGREEMENT (this "Agreement") is entered into and between Clackamas County ("County"), a political subdivision of the State of Oregon, on behalf of the Clackamas County Sheriff's Office ("CCSO"), and the North Clackamas School District ("Agency"), an Oregon municipal corporation, collectively referred to as the "Parties" and each a "Party."

**RECITALS**

Oregon Revised Statutes Chapter 190.010 confers authority upon local governments to enter into agreements for the performance of any and all functions and activities that a party to the agreement, its officers or agencies have authority to perform.

The Agency has requested, and the County has agreed, that the County provide sheriff deputies ("Deputy") who will act as a school resource officer ("SRO") to work in Clackamas and Rex Putnam High Schools. SRO's fulfill a vital role in promoting communication and cooperation between the school district and law enforcement to support safe school communities and contribute to the learning process.

In consideration of the mutual promises set forth below and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereby agree as follows:

**TERMS**

1. **Term.** This Agreement shall be effective as of January 1, 2021, upon execution, and shall expire upon the completion of each and every obligation of the Parties set forth herein, or December 31, 2024, whichever is sooner.
2. **Scope of Work.** The County agrees to provide the services ("Work") further identified in the Scope of Work and Additional Terms and Conditions, attached hereto as Exhibit A and incorporated herein. Parties will meet prior to the start of each school year to discuss anticipated needs, within the Scope of Work, in the upcoming school year.
3. **Consideration.** The Agency agrees to pay County, from available and authorized funds, the amount set forth on the schedule attached hereto as Exhibit B for accomplishing the Work required by this Agreement.
4. **Payment.** Unless otherwise specified, the County shall submit monthly invoices for Work performed and shall include the total amount billed to date by the County prior to the current invoice. Invoices shall describe all Work performed with particularity, by whom it was performed, and shall itemize and explain all expenses for which reimbursement is claimed. Payments shall be made to County following the Agency's review and approval of invoices submitted by County. County shall not submit invoices for, and the Agency will not pay, any amount in excess of the maximum compensation amount set forth above.
5. **Representations and Warranties.**
  - A. *Agency Representations and Warranties:* Agency represents and warrants to County that Agency has the power and authority to enter into and perform this Agreement, and this Agreement, when executed and delivered, shall be a valid and binding obligation of Agency enforceable in accordance with its terms.

- B. *County Representations and Warranties*: County represents and warrants to Agency that County has the power and authority to enter into and perform this Agreement, and this Agreement, when executed and delivered, shall be a valid and binding obligation of County enforceable in accordance with its terms.
  - C. The warranties set forth in this section are in addition to, and not in lieu of, any other warranties provided.
6. **Termination.**
- A. Either the County or the Agency may terminate this Agreement at any time upon thirty (30) days written notice to the other party.
  - B. Either the County or the Agency may terminate this Agreement in the event of a breach of the Agreement by the other. Prior to such termination however, the Party seeking the termination shall give the other Party written notice of the breach and of the Party's intent to terminate. If the breaching Party has not entirely cured the breach within fifteen (15) days of deemed or actual receipt of the notice, then the Party giving notice may terminate the Agreement at any time thereafter by giving written notice of termination stating the effective date of the termination. If the default is of such a nature that it cannot be completely remedied within such fifteen (15) day period, this provision shall be complied with if the breaching Party begins correction of the default within the fifteen (15) day period and thereafter proceeds with reasonable diligence and in good faith to effect the remedy as soon as practicable. The Party giving notice shall not be required to give more than one (1) notice for a similar default in any twelve (12) month period.
  - C. The County or the Agency shall not be deemed to have waived any breach of this Agreement by the other Party except by an express waiver in writing. An express written waiver as to one breach shall not be deemed a waiver of any other breach not expressly identified, even though the other breach is of the same nature as that waived.
  - D. Either Party may terminate this Agreement in the event it fails to receive expenditure authority sufficient to allow the Party, in the exercise of its reasonable administrative discretion, to continue to make payments for performance of this Agreement, or if federal or state laws, regulations or guidelines are modified or interpreted in such a way that either the Work to be performed under this Agreement is prohibited or the Party is prohibited from paying for such work from the planned funding source.
  - E. Any termination of this Agreement shall not prejudice any rights or obligations accrued to the Parties prior to termination.
7. **Indemnification.** Subject to the limits of the Oregon Constitution and the Oregon Tort Claims Act or successor statute, the County agrees to indemnify, save harmless and defend the Agency, its officers, elected officials, agents and employees from and against all costs, losses, damages, claims or actions and all expenses incidental to the investigation and defense thereof arising out of or based upon damages or injuries to persons or property caused by the negligent or willful acts of the County or its officers, elected officials, owners, employees, agents, or its subcontractors or anyone over which the County has a right to control.

Subject to the limits of the Oregon Constitution and the Oregon Tort Claims Act or successor statute, the Agency agrees to indemnify, save harmless and defend the

County, its officers, elected officials, agents and employees from and against all costs, losses, damages, claims or actions and all expenses incidental to the investigation and defense thereof arising out of or based upon damages or injuries to persons or property caused by the negligent or willful acts of the Agency or its officers, elected officials, owners, employees, agents, or its subcontractors or anyone over which the Agency has a right to control.

However, neither Agency nor any attorney engaged by Agency shall defend the claim in the name of County or any department of County, nor purport to act as legal representative of County or any of its departments, without first receiving from the Clackamas County Counsel's Office authority to act as legal counsel for County, nor shall Agency settle any claim on behalf of County without the approval of the Clackamas County Counsel's Office. County may, at its election and expense, assume its own defense and settlement.

8. **Insurance.** The Parties agree to maintain levels of insurance, or self-insurance, sufficient to satisfy their obligations under this Agreement and all requirements under applicable law.
9. **Notices; Contacts.** Legal notice provided under this Agreement shall be delivered personally, by email or by certified mail to the individuals identified below. Any communication or notice so addressed and mailed shall be deemed to be given upon receipt. Any communication or notice sent by electronic mail to an address indicated herein is deemed to be received 2 hours after the time sent (as recorded on the device from which the sender sent the email), unless the sender receives an automated message or other indication that the email has not been delivered. Any communication or notice by personal delivery shall be deemed to be given when actually delivered. Either Party may change the Party contact information, or the invoice or payment addresses by giving prior written notice thereof to the other Party at its then current notice address.

The CCSO Finance Manager or their designee will act as liaison for the County.

**Contact Information:**

Nancy Artmann, Finance Manager Clackamas County Sheriff's Office  
 Desk: 503.785.5012  
 Email: [nartmann@clackamas.us](mailto:nartmann@clackamas.us)  
 Mail: 2223 Kaen Rd, Oregon City, OR 97045

The Agency's Risk Manager or their designee will act as liaison for the Agency.

**Contact Information:**

David Kruse  
 Phone: 503.353.1909  
 Email: [krused@nclack.k12.or.us](mailto:krused@nclack.k12.or.us)  
 12400 SE Freeman Way  
 Milwaukie OR 97222

10. **Control of Personnel.** The SRO is solely the employee of the County. Control of personnel, supervision, standards of performance, discipline, and all other aspects of performance shall be governed entirely by the County and the Clackamas County Sheriff's Office. Allegations of misconduct shall be investigated in accordance with Clackamas County Sheriff's Office Policy and Procedures. All liabilities for salaries, wages, any other compensation, injury, or sickness arising from performance of the law enforcement services provided by the SRO shall be that of the County.

11. **General Provisions.**

- A. **Oregon Law and Forum.** This Agreement, and all rights, obligations, and disputes arising out of it will be governed by and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without giving effect to the conflict of law provisions thereof. Any claim between County and Agency that arises from or relates to this Agreement shall be brought and conducted solely and exclusively within the Circuit Court of Clackamas County for the State of Oregon; provided, however, if a claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by the County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the Constitution of the United States or otherwise, from any claim or from the jurisdiction of any court. Agency, by execution of this Agreement, hereby consents to the in personam jurisdiction of the courts referenced in this section.
- B. **Compliance with Applicable Law.** Both Parties shall comply with all applicable local, state and federal ordinances, statutes, laws and regulations. All provisions of law required to be a part of this Agreement, whether listed or otherwise, are hereby integrated and adopted herein. Failure to comply with such obligations is a material breach of this Agreement.
- C. **Non-Exclusive Rights and Remedies.** Except as otherwise expressly provided herein, the rights and remedies expressly afforded under the provisions of this Agreement shall not be deemed exclusive, and shall be in addition to and cumulative with any and all rights and remedies otherwise available at law or in equity. The exercise by either Party of any one or more of such remedies shall not preclude the exercise by it, at the same or different times, of any other remedies for the same default or breach, or for any other default or breach, by the other Party.
- D. **Access to Records.** Agency shall retain, maintain, and keep accessible all records relevant to this Agreement ("Records") for a minimum of six (6) years, following Agreement termination or full performance or any longer period as may be required by applicable law, or until the conclusion of an audit, controversy or litigation arising out of or related to this Agreement, whichever is later. Agency shall maintain all financial records in accordance with generally accepted accounting principles. All other Records shall be maintained to the extent necessary to clearly reflect actions taken. During this record retention period, Agency shall permit the County's authorized representatives' access to the Records at reasonable times and places for purposes of examining and copying.
- E. **Debt Limitation.** This Agreement is expressly subject to the limitations of the Oregon Constitution and Oregon Tort Claims Act, and is contingent upon appropriation of funds. Any provisions herein that conflict with the above referenced laws are deemed

inoperative to that extent.

- F. **Severability.** If any provision of this Agreement is found to be unconstitutional, illegal or unenforceable, this Agreement nevertheless shall remain in full force and effect and the offending provision shall be stricken. The Court or other authorized body finding such provision unconstitutional, illegal or unenforceable shall construe this Agreement without such provision to give effect to the maximum extent possible the intentions of the Parties.
- G. **Integration, Amendment and Waiver.** Except as otherwise set forth herein, this Agreement constitutes the entire agreement between the Parties. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Agreement. No waiver, consent, modification or change of terms of this Agreement shall bind either Party unless in writing and signed by both Parties and all necessary approvals have been obtained. Such waiver, consent, modification or change, if made, shall be effective only in the specific instance and for the specific purpose given. The failure of either Party to enforce any provision of this Agreement shall not constitute a waiver by such Party of that or any other provision.
- H. **Interpretation.** The titles of the sections of this Agreement are inserted for convenience of reference only and shall be disregarded in construing or interpreting any of its provisions.
- I. **Independent Contractor.** Each of the Parties hereto shall be deemed an independent contractor for purposes of this Agreement. No representative, agent, employee or contractor of one Party shall be deemed to be a representative, agent, employee or contractor of the other Party for any purpose, except to the extent specifically provided herein. Nothing herein is intended, nor shall it be construed, to create between the Parties any relationship of principal and agent, partnership, joint venture or any similar relationship, and each Party hereby specifically disclaims any such relationship.
- J. **No Third-Party Beneficiary.** Agency and County are the only parties to this Agreement and are the only parties entitled to enforce its terms. Nothing in this Agreement gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Agreement.
- K. **Counterparts.** This Agreement may be executed in several counterparts (electronic or otherwise), each of which shall be an original, all of which shall constitute the same instrument.
- L. **Survival.** All provisions in Sections 5, 7, and 11 (A), (C), (D), (E), (F), (G), (I), (J), (L), (Q), and (R) shall survive the termination of this Agreement, together with all other rights and obligations herein which by their context are intended to survive.
- M. **Necessary Acts.** Each Party shall execute and deliver to the others all such further instruments and documents as may be reasonably necessary to carry out this Agreement.
- N. **Time is of the Essence.** Agency agrees that time is of the essence in the performance this Agreement.
- O. **Successors in Interest.** The provisions of this Agreement shall be binding upon

and shall inure to the benefit of the parties hereto, and their respective authorized successors and assigns.

- P. **Force Majeure.** Neither Agency nor County shall be held responsible for delay or default caused by events outside of the Agency or County’s reasonable control including, but not limited to, fire, terrorism, riot, acts of God, or war. However, Agency shall make all reasonable efforts to remove or eliminate such a cause of delay or default and shall upon the cessation of the cause, diligently pursue performance of its obligations under this Agreement.
- Q. **Confidentiality.** County acknowledges that it and its employees or agents may, in the course of performing their responsibilities under this Agreement, be exposed to or acquire confidential information. Any and all information of any form obtained by County or its employees or agents in the performance of this Agreement shall be deemed confidential information of the Agency (“Confidential Information”). County agrees to hold Confidential Information in strict confidence, using at least the same degree of care that County uses in maintaining the confidentiality of its own confidential information, and not to copy, reproduce, sell, assign, license, market, transfer or otherwise dispose of, give, or disclose Confidential Information to third parties or use Confidential Information for any purpose unless specifically authorized in writing under this Agreement.
- R. **No Attorney Fees.** In the event any arbitration, action or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Agreement, each party shall be responsible for its own attorneys’ fees and expenses.

**IN WITNESS HEREOF**, the Parties have executed this Agreement by the date set forth opposite their names below.

**Clackamas County**

**North Clackamas School District**

\_\_\_\_\_  
Chair, Board of County Commissioners

\_\_\_\_\_

By: \_\_\_\_\_

Its: \_\_\_\_\_

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**Clackamas County Sheriff’s Department**

\_\_\_\_\_  
Craig Roberts, Sheriff

\_\_\_\_\_  
Date

Exhibit A  
SCOPE OF WORK & ADDITIONAL TERMS AND CONDITIONS

**Section 1. RESPONSIBILITIES OF SCHOOL RESOURCE OFFICER (SRO)**

1. **Role.** The assigned SRO provides law enforcement expertise and resources to assist school administrators and staff in providing a safe school environment. The SRO is empathetic and knowledgeable in equity and diversity issues, juvenile restorative justice principles, and trauma-informed investigatory practices. In this role the School Resource Officer:
  - 1.1 Promotes safety in and around the school by using crime prevention strategies geared toward positive student behavior;
  - 1.2 Builds trust and respect between law enforcement and students by mentoring and providing guidance, and connects students to resources to resolve concerns affecting youth safety and security;
  - 1.3 Provides schools with additional educational resources about law enforcement related topics;
  - 1.4 Works collaboratively with school staff and administrators, and community stakeholder groups;
  - 1.5 Support school in emergency management.
2. **School Discipline.** Agency's school administrators and teachers are solely responsible for school discipline. The SRO is not involved with enforcement of school rules or disciplinary infractions unless they are also violations of law.
3. **Agency Policies & Training**
  - 3.1 **Training.** The SRO will participate in training as identified by the Agency which may include the same, "Public School Work" courses (30-40 minutes in duration) required of Agency staff, along with training covering equity, trauma-informed care, and restorative justice.
  - 3.2 **Agency Policy.** The SRO will have a working knowledge of Agency policies and procedures as identified by the Agency in Exhibit A, Appendix I. The SRO will comply with Agency policies and procedures to the extent consistent with applicable law. If at any time the SRO believes an Agency policy or

procedure cannot be complied with, the SRO will promptly advise the Agency and the CCSO. The parties will confer and strive to attain a mutually agreeable understanding. Agency will promptly provide the CCSO with any changes to policies or administrative regulations that may impact SRO responsibilities.

4. **School Work Schedule.** When school is in session, the SRO will work a schedule determined by the CCSO and the Agency. The SRO will attend faculty meetings and PTA meetings that are related to SRO responsibilities, and will assist in providing security at certain evening or weekend school functions, such as athletic events, dances, field trips, and/or special events.
5. **Communication.** A cooperative relationship and collaborative communication between the SRO and school administration is central to the role. The SRO will meet with school administrators regularly in the coordination of SRO activities, and to exchange information to address safety, student conflicts, and/or situations that may cause disorder at the school or in the community.
6. **Scope of Work.** The duties of the SRO involve the following activities in addition to other duties as assigned:
  - 6.1 Establishes rapport and builds relationships with students;
  - 6.2 Works to support effective communication between law enforcement officials, school staff and students;
  - 6.3 Works closely with school staff and administrators to identify and provide preventive assistance and services to students and families;
  - 6.4 In collaboration with school administrators helps parents and students, which may involve referral to an appropriate agency;
  - 6.5 Refers student violations of Agency policy to school administration;
  - 6.6 Notifies the building principal as soon as practicable of any significant law enforcement event or public safety threat;
  - 6.7 Investigates and takes appropriate action in consultation with school administration regarding suspected law violations that occur within the school and/or in association with school activities;
  - 6.8 Assists school administration in the proper collection and disposal of illegal substances, weapons and other prohibited items recovered by the school, when they are not needed for criminal prosecution;

- 6.9 Presents information on law enforcement and related criminal justice topics to relevant classes, student assemblies, and clubs;
- 6.10 Makes presentations to stakeholder groups regarding the operations of the Sheriff's Office and the School Resource Officer Program.

## Section 2. SEARCH AND SEIZURE

### 2.1 Student Conduct Occurring Under Agency Jurisdiction

- 2.1.1 **School Administrative Search.** Unless assistance is specifically requested by school administration the SRO is not involved in Agency's administrative searches. Administrative searches are at the exclusive direction and control of the Agency. (Reference: NCSD Policy, JFG; JFG-AR)
  - 2.1.2 **School Resource Officer Search.** In accordance with Agency policy, students may be searched by law enforcement officials on school property, or when the student is under the jurisdiction of the Agency. This authority is balanced by collaboration between the SRO and school administration as they work cooperatively to protect staff and students, maintain a safe environment in the school, and safeguard Agency property. In furtherance of these objectives, and as permitted by law, the SRO may search students and property, seize evidence, conduct interviews and engage in other law enforcement actions. In the exercise of duties, the SRO will confer with school administration unless circumstances do not allow
- 2.2 **Student Conduct Occurring Outside of Agency Jurisdiction.** When requests by law enforcement are made to the SRO to interview a student or to conduct an investigation for conduct occurring outside Agency jurisdiction, the SRO will promptly contact school administration with the request and refer the requesting agency to school administration. Interviews may be permitted upon request and with administrator approval in accordance with Agency Policy. (NCSD Policy: JFG, JFG-AR; KN; KN-AR)
- 2.3 **Exigent Circumstances.** In the event of an emergency, as determined by the CCSO/SRO in its reasonable discretion, the CCSO/SRO will perform such searches consistent solely with applicable law and not in accordance with Agency's policies and regulations JFG, KN, and KN-AR.

## Section 3. STUDENT INFORMATION ACCESS & DISCLOSURE

- 3.1 **Privacy Restrictions.** The access to and release of student information by the SRO under this Agreement is governed by ORS 336.187 and ORS 326.565 – 326.580, and the Family Education Rights and Privacy Act ("FERPA"), 20 U.S.C. § 1232g,

and its implementing regulations. For purposes of access to student records, the SRO is considered a “school official”. In accordance with FERPA, “school officials” may access and disclose student records only as authorized by FERPA. Subject to any exceptions under applicable law, the SRO will not disclose records, or information contained within those records, without permission from Agency administration.

- 3.1.1 For purposes of access to student records, the SRO as a “school official” may be provided students’ personally identifiable information (“PII”) on an as-needed basis in the performance of SRO duties for legitimate educational purposes, and to promote school safety and physical security. *The SRO may only use PII for the purpose for which the disclosure was made.*
- 3.1.2 Without prior consent by an Agency administrator, the SRO acting as a school official, may not disclose PII obtained from student records, to others including other law enforcement officials who are not acting in the capacity as school officials, unless the disclosure fits within one of the exceptions to consent in FERPA and/or ORS 336.187 and ORS 326.565 – 326.580.
- 3.2 **FERPA Training.** Agency will provide SRO training necessary to comply with applicable Agency policies, and state and federal student privacy laws.
- 3.3 **Student Directory Information.** Information that is designated as student “directory information” is identified by Agency policy, and is generally information that would not be considered harmful or an invasion of privacy if disclosed. Administration may disclose directory information unless a parent has opted-out of disclosure. The SRO or other law enforcement officials seeking access to student directory information may request access from the school building principal. (Reference: NCSD policy, JOA)
- 3.4 **Security Cameras.** The SRO may access campus security cameras and recordings for purposes of school safety and other law enforcement purposes with prior Agency consent, or upon execution of a search warrant. Consent is not required in the event of an active violent crisis or other exigent circumstances. (Reference: NCSD policy, ECAC; ECAC-AR)
- 3.5 **Law Violations Exchange of Information.** The SRO and the building principal will promptly exchange information regarding any possible law violation that may have occurred on and around school grounds, or during school activities. (Reference: NCSD policy, KN & KN-AR, “Relations with Law Enforcement Agencies”)

EXHIBIT A – Appendix I  
North Clackamas School District Policies  
Relating to SRO Scope of Work

**Law Enforcement Interactions:**

- [KN-AR1 Relations with Law Enforcement Agencies](#)
- [KN-AR2 Relations with Law Enforcement Agencies](#)
- [GHFE/JHFE-AR\(2\) - Abuse of a Child Investigations Conducted on School Premises](#)
- [GBJ - Weapons in Schools–Staff](#)
- [JFCJ - Weapons - Students](#)
- [JFG - Student Searches\\*\\*](#)
- [JFG-AR - Student Searches\\*\\*](#)

**Staff/Students:**

- [GCCB/GDCB/IKAAA - District Equity Policy](#)
- [GHFE/JHFE Reporting of Suspected Abuse of a Child](#)
- [GHFE/JHFE-AR\(1\) Reporting of Suspected Abuse of a Child](#)
- [GHFF/JHFF - Reporting Requirements Regarding Sexual Conduct with Students](#)
- [JBA/GBN - Sexual Harassment\\*\\*](#)
- [JBA/GBN-AR\(1\) - Sexual Harassment Complaint Procedure\\*\\*](#)
- [JBA/GBN-AR\(2\) - Sexual Harassment Complaint Form](#)
- [GBEC Drug-Free Workplace](#)
- [GBH/JECAC - School and Custodial/Noncustodial Parent Relations\\*\\*](#)
- [GBK/KGC - Prohibited Use, Distribution or Sale of Tobacco Products or Inhalant Delivery Systems\\*\\*](#)
- [GBNA - Hazing/Harassment/Intimidation/Bullying/Menacing - Staff\\*\\*](#)
- [GBNA-AR - Hazing/Harassment/Intimidation/Bullying/Menacing Complaint Procedures - Staff](#)
- [GBNA/JFCF-AR - Hazing/Harassment/Intimidation/Bullying/Menacing/Cyberbullying/Teen Dating Violence/Domestic Violence Complaint Procedures\\*\\*](#)
- [GBNAA/JHFF - Reporting Requirements for Suspected Sexual Conduct with Students](#)
- [GBNAA/JHFF-AR Suspected Sexual Conduct Report Procedures and Form](#)
- [GBO - Staff and Volunteer - Student Relations\\*\\*](#)
- [JEA - Compulsory Attendance\\*\\* JEDA - Truancy](#)
- [JFCG/JFCH/JFCI - Use of Tobacco Products, Alcohol, Unlawful Drugs, Inhalant Delivery Systems or Mind-Altering Substances](#)
- [JFCG/JFCH/JFCI-AR - Student Use, Possession, Sale or Distribution of Tobacco Products, Alcohol, Unlawful Drugs, Inhalant Delivery Systems or Mind-Altering Substances](#)
- [JFCJ - Weapons - Students](#)
- [JFCM - Threats of Violence\\*\\*](#)

- [JOA - Directory Information\\*\\*](#)
- [JOB - Personally Identifiable Information\\*\\*](#)

**District-Community Relations/Facility Use & Access:**

- [KAB - Parental Rights\\*\\*](#)
- [KAB-AR - Parental Rights\\*\\*](#)
- [KG - Community Use of District Facilities](#)
- [KG-AR\(1\) - Community Use and Rental of District Facilities](#)
- [KG-AR\(2\) - District Facility Use Fee Schedule](#)
- [KGB - Public Conduct on District Property](#)
- [KK - Visitors to District Facilities\\*\\*](#)
- [KK-AR - Procedures in Dealing with Disruptive Visitors\\*\\*](#)

**STUDENT SUCCESS ACT: STUDENT INVESTMENT ACCOUNT**  
**2021-2023 PLAN**

**REPORT**  
Agenda Item #7  
May 27, 2021

**SUPERINTENDENT'S RECOMMENDATION:**

This item is presented for Board information.

**ORIGINATED BY:**

Grant recipients are encouraged to share their 2021-2023 Student Investment Plan at an open public meeting with the opportunity for public comment.

**BUDGET IMPACT/SOURCE OF FUNDS:**

The preliminary allocation for 2021-2022 from the Student Investment Account to North Clackamas School District and its eligible charter schools is \$10,972,066.07.

**BACKGROUND:**

The purpose of the Student Investment Account funds are to:

1. Meet students' mental and behavioral health needs.
2. Increase academic achievement & reduce academic disparities for students of color; students with disabilities; emerging bilingual students; and students navigating poverty, homelessness, and foster care; and other student groups that have historically experienced academic disparities.

The North Clackamas School District participated in an extensive need assessment (2019-20) which included a data review and community, staff, student engagement processes. Key themes that emerged from the district's need assessment identified as most urgent were:

- Increase Mental Health Supports
- Retain/Recruit Diverse Staff
- Lower Class Size/Caseload
- Strengthen Culturally Relevant Practices Throughout System
- Develop Community Partnerships
- Increase Proficiency in Literacy (Grades K-3rd)
- Expand Social Services to Students and Families

These themes of the most urgent needs informed the development of the three-year proposal for the Student Investment Account funds which was approved by the Oregon Department of Education and the North Clackamas School Board on October 8, 2020.

The North Clackamas School District three-year Student Investment Plan (2020-2023) established five strategies along with activities to meet the goals and outcomes established.

**Strategy 1:** Invest in targeted class size reduction/case load in secondary English Language Arts, science, and math classes, special education, English Language Development and elementary schools with an emphasis on grades K-2.

**Activities:**

- Maintaining Counselor Positions
- Maintaining Special Education Positions
- Increasing Special Education Staffing, Increasing English Language Development Staffing, and targeted K-2 literacy supports

**Strategy 2:** Expand and invest in teams of professionals to support the behavioral health and wellness needs of students and families.

**Activities:**

- Contracted Mental Health Services
- Maintaining Elementary School Wellness Teachers
- Maintaining Social Workers
- Financial Support of Student Based Health Centers
- Increasing Nurse Staffing
- Maintaining and increasing Family Advocates

**Strategy 3:** Develop and support collaborative partnerships with families and community organizations using culturally relevant and linguistically specific practices.

**Activities:**

- Maintaining Black/African American & Native Hawaiian-Pacific Islander Community Outreach Facilitator
- Maintain Ready, Set, Go Program at Bilquist Elementary School and Wichita Family Center
- Promoting Partnerships with Early Learning Providers and Collaborative Envisioning
- Maintaining Early Learning Coordinator
- Exploration and expansion of community partnerships

**Strategy 4:** Invest in job embedded and periodic professional learning aimed at relevant practices and effective instructional techniques and hiring practices.

**Activities:**

- Professional Development of staff (e.g. grading practices, best practices in early literacy, equity training)
- Equity Coordination Facilitation
- Hiring Workshops for Administrators

**Strategy 5:** Reduce barriers for accessing academic interventions.

**Activities:**

- Hiring Bilingual Help Desk Positions (Technology)
- Academic Intervention/Leadership Development/Tutorial Support at Milwaukie High School/Milwaukie Academy of the Arts
- Multi-Tiered System of Support/Social Emotional Instructional Coach for Elementary Schools

**ATTACHMENT:**  
Presentation Slides

**PRESENTER / STAFF CONTACT:**  
Joel Stuart, Student Success Act - Lead Administrator

Student Investment Account  
2021-23 Plan/Summary  
North Clackamas School District  
May 27, 2021



**Our Students. Our Success.**



# Student Investment Account

## What is the Purpose of the Student Investment Account?

1. Meet students' mental and behavioral health needs.
2. Increase academic achievement and reduce academic disparities for:
  - Students of color;
  - Students with disabilities;
  - Emerging bilingual students; and
  - Students navigating poverty, homelessness, and foster care; and other students who have historically experienced disparities in our schools.

# Results of Engagement

## Most Urgent Needs -

- Increase Mental Health Supports
- Retain/Recruit Diverse Staff
- Lower Class Size/Caseload
- Strengthen Culturally Relevant Practices Throughout System
- Develop Community Partnerships
- Increase Proficiency in Literacy (K-3)
- Expand Social Services to Students and Families

# What does being successful in school mean to you?

- Acceptance/Feeling Valued/Relationship (4.6)
- Critical Thinking (4.6)
- Promote Growth/Development with High Expectations (4.5)
- Love of Learning (4.5)
- Well Rounded Education (4.5)
- Academic Foundation(4.4)
- Safety/Support/Accessibility (4.4)

# Proposed Funding - \$10,972,066.07



Original Allocation: \$13,594,925.98

**2020-21** Allocation: \$4,313,087.74

Proposed **2021-22** Allocation:  
\$10,972,066.07

# Strategy 1

Invest in targeted class size reduction/case load in secondary English Language Arts, science, and math classes, special education, English Language Development and elementary schools with an emphasis on grades K-2.

## **Activities:**

- Maintaining Counselor Positions
- Maintaining Special Education Positions
- Increasing Special Education Staffing, Increasing English Language Development Staffing, and targeted K-2 literacy supports

# Strategy 2

Expand and invest in teams of professionals to support the behavioral health and wellness needs of students and families.

**Activities:**

- Contracted Mental Health Services
- Maintaining Elementary School Wellness Teachers
- Maintaining Social Workers
- Financial Support of Student Based Health Centers
- Increasing Nurse Staffing
- Maintain and increase family advocates

# Strategy 3

Develop and support collaborative partnerships with families and community organizations using culturally relevant and linguistically specific practices.

## **Activities:**

- Maintaining Black/African American & Native Hawaiian-Pacific Islander Community Outreach Facilitator
- Maintain Ready, Set, Go Program at Bilquist and Wichita Family Center
- Promoting Partnerships with Early Learning Providers and Collaborative Envisioning
- Maintaining Early Learning Coordinator
- Exploration and expansion of community partnerships

# Strategy 4

Invest in job embedded and periodic professional learning aimed at relevant practices and effective instructional techniques and hiring practices.

**Activities:**

- Professional Development of staff (e.g. grading practices, best practices in early literacy, equity training)
- Equity Coordination Facilitation
- Hiring Workshops for Administrators

# Strategy 5

Reduce barriers for accessing academic interventions.

**Activities:**

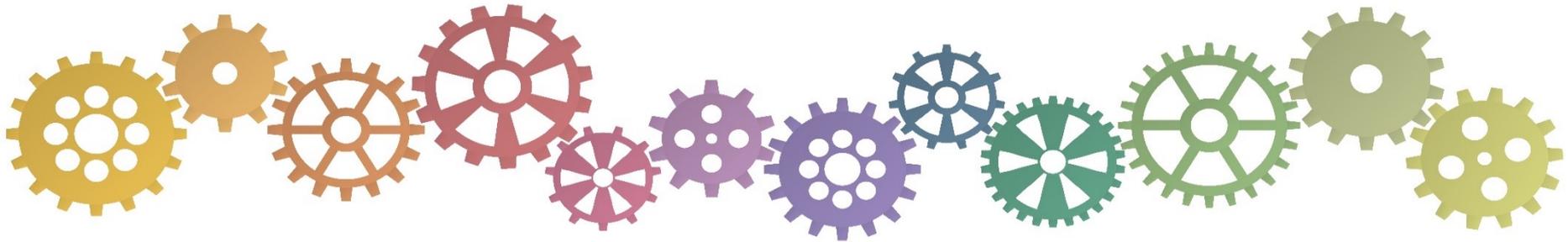
- Hiring Bilingual Help Desk Positions (Technology)
- Academic Intervention/Leadership Development/Tutorial Support at MHS/MAA
- Multi-Tiered System of Support/Social Emotional Coach for (Elementary Schools)

# Outcomes

Outcome	Cultivating a safe, caring and inclusive learning environment where the success of each student is not be predicted by race, ethnicity, language, gender, gender identity, country of origin, disability, sexual orientation, socio economics, religion, marital status, or initial proficiencies.
Outcome	Attract, hire and retain high-quality staff that reflect the student demographics of the school district while elevating the professional capacity of our workforce to meet the needs of today's learners.
Outcome	Each adult in the system addresses and responds to each student's academic, social, emotional, and physical needs.
Outcome	Support student learning with rigorous, culturally relevant, consistent curriculum and clear expectations for teaching and learning while providing instructional supports and systems to meet the needs of all students.
Outcome	Strengthen connections between our students, our schools and our community.

# Next Steps

grades time  
person academic classes  
things engaged help good education  
work community feel future  
social think support  
new skills + real safe best  
teach kids critical world trying children  
want life interact learning  
means challenged successful  
participating happy important  
day politics



# Questions?

## Our Students. Our Success.



## **CAPITAL CONSTRUCTION BOND UPDATE**

**REPORT**  
Agenda Item #8  
May 27, 2021

### **SUPERINTENDENT'S RECOMMENDATION:**

Board to receive informational report on progress being made in the implementation of the capital construction bond levy approved November 2016.

### **BACKGROUND:**

On November 8 2016, voters in North Clackamas approved up-to \$433 million in general obligation capital projects bonds. These general obligation bonds will:

- Renovate/remodel schools, some as old as 100 years
- Address security, safety, seismic needs
- Address unfunded maintenance
- Improve the student learning experience
- Increase access to technology
- Relieve overcrowding
- Provide a new additional elementary school
- Provide an additional comprehensive high school
- Provide property for future middle school and future transportation center
- Estimated not to exceed the 2015 NCS D tax rate

The bond program implementation is on month 55 of 65+ months (~85 % through the bond).

The bond program has spent approximately 88% of the revised bond budget.

The bond program has spent and committed approximately 96% of the revised bond budget.

The bond program has 30 projects completed, 7 in construction, 4 in design, and zero projects remaining to start design.

The project counts do not include all projects. For example, the project counts do not include the bus maintenance shop, secure entry project, emergency generator project, security fencing project, and classroom monitors project.

District staff will update the Board on bond finances, schedules and project updates.

### **ATTACHMENTS:**

- A. Presentation Slides
- B. Inclusion in Diversity and Contracting
- C. Project Schedule Update
- D. Program Reserve Budget

**PRESENTERS / STAFF CONTACT:**

Cindy Detchon, Assistant Superintendent of Operations

Gayellyn Jacobson, Chief Financial Officer

Ron Stewart, Senior Director of Capital Projects



# **2016 Capital Construction Bond Update**

May 27, 2021

# Bond Program Status

## North Clackamas School District Bond Program Status Report May 19, 2021

Total Bond Budget	\$518,782,614	100% of total bond budget
Total Spent	\$454,854,937	88% of total bond budget spent
Total Spent & Committed	\$500,508,449	96% of total bond budget spent & committed
Total Budget Remaining (unspent and uncommitted)	\$18,274,165	4% of total bond budget unspent & uncommitted
Time Completed of Bond Program	55 of 65+ months of Bond Program	85% of total time of bond program completed
Projects Completed	30 of 41	73.2% of total number of projects completed
Percent of Commitments Fulfilled with Completed Projects	100%	100% of commitments completed on projects
Projects in Construction	7 of 41	17.1% of total number of projects currently in construction
Projects in Design	4 of 41	9.8% of total number of projects in design
Projects Remaining to Start Design	0 of 41	0% of total number of projects remaining to start design
Properties Purchased	4 of 4	100% of properties to be purchased are purchased

\* Budget as of 4/30/2021

Completed Projects section does not include Phase II Transportation project and Emergency Power Connectivity Project

Projects in Design section does not include the Secure Entry Project

# Inclusion and Diversity in Contracting

## May 19, 2021

	Previous Report 2/17/21	Current Report 5/19/21	Difference from previous Report (Current-Previous)
<b>Consultant's Summary</b>			
# of COBID Consultants	39	47	8
Total # of Consultants	174	210	36
% COBID Consultants ( <b>Aspirational Goal: 15% Participation</b> )	22.41%	<b>22.38%</b>	-0.03%
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	Previous Report 2/17/21	Current Report 5/19/21	Difference from previous Report (Current-Previous)
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	Previous Report 2/17/21	Current Report 5/19/21	Difference from previous Report (Current-Previous)
<b>Bond Program Summary (Consultants and Contractors Combined)</b>			
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% COBID Consultants & Contractors Contract Value	10.30%	9.15%	-1.15%

**COBID - Certification Office for Business Inclusion and Diversity**  
 WBE - Women Business Enterprise  
 ESB - Emerging Small Business  
 MBE - Minority Business Enterprise  
 SDVBE - Service Disabled Veteran Business Enterprise  
 DBE - Disadvantaged Business Enterprise

# Project Milestone Schedule Update

North Clackamas School District November 2016 Bond Measure Project Schedule Update May 19, 2021 <small>(Red font indicates changes since the February 17, 2021 Community Bond Oversight Committee report)</small>				
School / Project	Design Start	Construction Start	Construction Completion	Comments
<b>Projects Completed</b>				
1 Alder Creek Middle School Improvements	February 2017	April 2018	September 2019	
2 Athletic Fields / Clackamas High School Improvements	June 2017	June 2018	Fall 2018	
3 Athletic Fields / Rex Putnam High School Improvements	June 2017	June 2018	Fall 2018	
4 Beatrice Morrow Cannady Elementary School	January 2017	April 2018	August 2019	
5 Biquist Elementary School Improvements	June 2018	June 2019	September 2019	
6 Clackamas High School East / Phase One Classroom Addition	January 2017	August 2017	May 2018	
7 Clackamas High School -West Canopy Repair	June 2018	June 2019	September 2021	
8 District Stadium at Alder Creek Middle School Replacement	Winter 2017	Spring 2018	Fall 2018	
9 Facility Operations (Fire Restoration) Phase 1 & 2 Improvements	March 2017	March 2017	January 2018	
10 Happy Valley Middle School Classroom Addition	September 2016	June 2017	March 2018	
11 Linwood / Soloumer Elementary Schools Improvements	May 2016	May 2019	September 2019	
12 Lot Whitcomb Elementary School Improvements and Additions	January 2017	January 2018	September 2018	
13 Milwaukie / El Puente Elementary Schools	June 2018	June 2019	October 2020	<del>Phased substantial completion - October. Building interior. <del>Completed - covered play structure. <del>Completed - added seats + additional parking lot. Schedule impacted by covid-19, wildfire, and smoke.</del></del></del>
14 Milwaukie High School/Milwaukie Academy of The Arts	December 2016	March 2018	Summer 2020	
15 Milwaukie High School / Lake Road Athletic Fields Renovations	June 2017	June 2018	Winter 2019	
16 Mount Scott Elementary School Classroom and Cafeteria Addition	September 2016	June 2017	January 2018	
17 Mount Scott Elementary School Improvements	May 2017	May 2018	December 2018	
18 Oak Grove Elementary School Improvements	April 2017	June 2018	December 2018	
19 Oregon Trail Elementary School improvements	June 2019	May 2020	September 2020	
20 Owen Sabih/Ben Scheinberg Professional Technical Center and Lab Improvements/Technology Information Services	January 2018	March 2019	Winter 2020	
21 Rex Putnam High School Improvements (Stadium Field & Track 2021)	January 2018	June 2019	September 2019	
22 Rex Putnam High School Health Center Addition	September 2016	May 2017	November 2017	
23 Riverside Elementary School Improvements	June 2019	June 2020	December 2020	
24 Seth Lewelling Elementary School Improvements and Addition	April 2017	June 2018	February 2019	
25 Sunnyside Elementary School Improvements	January 2017	April 2018	February 2019	
26 Transportation Facility Improvements Phase 1	Winter 2017	Winter 2018	October 2018	
27 Transportation Facility Phase 3A (Site work & new driveway)	March 2018	Spring 2020	Summer 2020	
28 Verne A. Duncan Elementary School Improvements	June 2018	October 2018	March 2019	
29 Wilbur D. Rowe Middle School and Field Improvements	May 2017	June 2018	October 2019	
* Transportation Facility Improvements Phase 2 (Elevator)	March 2018	May 2019	Winter 2020	
30 View Acres Elementary School Improvements	June 2019	June 2020	September 2020	<del>Building substantially complete. Field work and walk path remaining.</del>
<b>Projects In Construction</b>				
31 Adrienne C. Nelson High School	June 2017	June 2019	August 2021	Substantial Completion expected Spring 2021
32 Clackamas High School Improvements - Phase 2 - East	May 2020	May 2021	September 2021	Moved from Projects in Design section.
33 Clackamas High School Improvements - West	May 2020	May 2021	September 2021	Moved from Projects in Design section.
34 Clackamas High School Student Health Center Addition - West	May 2020	May 2021	September 2021	Moved from Projects in Design section.
35 Happy Valley Elementary School Improvements	May 2020	May 2021	September 2021	Moved from Projects in Design section.
36 Happy Valley Middle School Improvements	May 2020	May 2021	September 2021	Moved from Projects in Design section.
37 New Urban High School Replacement	December 2018	May 2020	September 2021	Moved from Projects in Design section.
* Transportation Facility Phase 3B (Site work & new shop)	March 2018	Spring 2021	Fall 2021	Moved from Projects in Design section.
<b>Projects In Design</b>				
38 Ardenwald Elementary School Improvements	June 2020	June 2021	September 2021	
<del>Clackamas High School Improvements - Phase 2 - East</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects in Construction section.
<del>Clackamas High School Improvements - West</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects in Construction section.
<del>Clackamas High School Student Health Center Addition - West</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects in Construction section.
<del>Happy Valley Elementary School Improvements</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects in Construction section.
<del>Happy Valley Middle School Improvements</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects in Construction section.
39 Hector Campbell Elementary School Improvements	June 2020	June 2021	September 2021	
40 Scouters Mountain Elementary School Improvements	June 2020	June 2021	September 2021	
41 Spring Mountain Elementary School Improvements	May 2020	June 2021	September 2021	
1. <del>Transportation Facility Phase 3B (Site work &amp; new shop)</del>	<del>March 2018</del>	<del>Spring 2021</del>	<del>Fall 2021</del>	Moved to projects in Construction section. -Project in phase- to accommodate school bus services.
<b>Future Projects</b>				
Miscellaneous small projects (TBD)	TBD	TBD	TBD	
Warranty phase / work				Until 12 months after substantial completion
Project and program closeout process and documentation				

# 2016 Bond Financial Summary

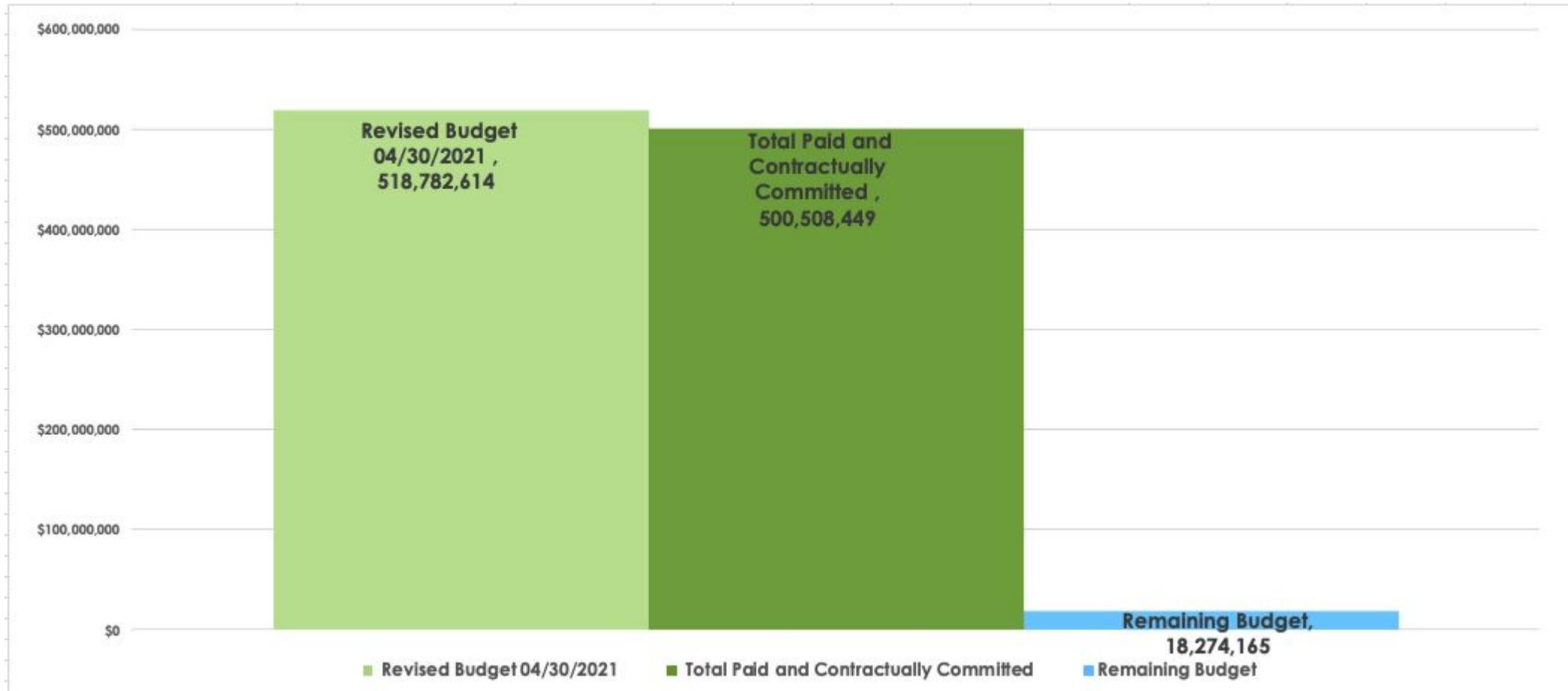
**Period Ending:** April 30, 2021

**Prepared By:** Gayellyn Jacobson, Chief Financial Officer

## Presentation Summary

- ❑ Bond Budget Summary
- ❑ Project Spend to Date
- ❑ Financial Statements
- ❑ Financial Forecast

# Bond Budget Summary



# Budget, Expenditures, Encumbrances & Remaining to Date by Project

Expenditure & Encumbrance To Date; North Clackamas School District; 2016 Bond					
April 30, 2021					
SITE	Original Funds Available 3/17/2017	Revised Budget 04/30/2021	Total Paid and Contractually Committed	Remaining Budget	
1	Adrienne C. Nelson High School	74,555,962	97,455,962	94,156,350	3,299,612
2	Adrienne C. Nelson High School Site Acquisition	15,780,000	14,168,081	14,163,303	4,778
3	Americans with Disabilities Act	4,000,000	-	-	-
4	Alder Creek Middle School	21,500,000	23,900,000	23,880,327	19,673
5	Ardenwald Elementary School	80,718	330,718	295,412	35,306
6	Athletic Fields Clackamas High School West & Rex Putnam High School	4,932,467	4,932,467	4,393,524	538,943
7	Beatrice Morrow Cannady Elementary School	36,855,001	32,321,574	32,366,125	(44,551)
8	Bilquist Elementary School	1,452,519	996,519	971,911	24,608
9	Bond Management	13,993,313	18,802,171	13,202,687	5,599,484
10	Campbell Elementary School	1,768,346	1,768,346	769,627	998,719
11	Clackamas High School East Phase I	2,000,000	3,076,480	3,051,480	25,000
12	Clackamas High School East Phase II	2,147,682	3,522,682	2,631,548	891,134
13	Clackamas High School West	3,093,235	6,184,132	5,774,228	409,904
14	Clackamas High School West Student Health Center	990,897	-	-	-
15	District Stadium Project	-	5,200,000	5,196,606	3,394
16	District Wide Projects	1,141,000	708,000	541,648	166,352
17	Energy Efficient Measures	2,500,000	-	-	-
18	Facility Operations Bond	2,300,818	1,800,818	1,784,375	16,443
19	Happy Valley Elementary School	121,118	121,118	123,775	(2,657)
20	Happy Valley Middle School Addition	5,309,612	4,833,162	4,815,533	17,629
21	Happy Valley Middle School Covered Play/Improvements	981,991	981,991	779,852	202,139
22	Linwood/Sojourner Elementary School	3,457,817	2,437,817	2,345,834	91,983
23	Lot Whitcomb Elementary & Seismic	15,000,000	16,200,000	16,126,942	73,058
24	Middle School Covered Play	2,000,000	-	-	-
25	Middle School Land Acquisition	9,000,000	6,730,531	6,730,531	0

# Budget, Expenditures, Encumbrances & Remaining to Date by Project (continued)

Expenditure & Encumbrance To Date; North Clackamas School District; 2016 Bond					
April 30, 2021					
SITE	Original Funds Available 3/17/2017	Revised Budget 04/30/2021	Total Paid and Contractually Committed	Remaining Budget	
26	Milwaukie High School/Milwaukie Academy of the Arts	77,272,331	96,642,331	96,180,135	462,196
27	Milwaukie/El Puente Elementary Schools	12,000,000	13,125,000	12,819,851	305,149
28	Mt. Scott Elementary School Improvements	2,111,616	2,111,616	2,079,975	31,641
29	Mt. Scott Elementary School Addition Funding Obtained from Clackamas County)	-	3,349,000	3,212,866	136,134
30	New Urban High School	10,918,823	26,080,000	23,936,916	2,143,084
31	Oak Grove Elementary School	3,245,138	3,955,138	3,933,080	22,058
32	Oregon Trail Elementary School	1,203,369	3,484,041	3,452,395	31,646
33	Owen Sabin/Ben Schellenberg Professional Technical Center/Land Lab/Technology and Information Services	30,150,012	40,844,012	40,049,852	794,160
34	Property Debt	2,000,000	2,002,121	2,002,121	-
35	Rex Putnam High School	5,287,468	5,287,468	5,213,478	73,990
36	Rex Putnam High School Student Health Center	1,020,982	1,381,982	1,343,050	38,932
37	Riverside Elementary School	2,400,376	4,455,376	4,259,722	195,654
38	Scouters Mountain Elementary	193,094	193,094	42,576	150,518
39	Security Cameras & Fencing	3,500,000	3,300,000	2,818,579	481,421
40	Seth Lewelling Elementary School	3,389,006	4,939,006	4,858,217	80,789
41	Spring Mountain Elementary School	1,165,843	1,165,843	1,168,005	(2,162)
42	Structured Learning Centers	500,000	-	-	-
43	Sunnyside Elementary & Seismic	12,000,000	16,225,000	16,192,518	32,482
44	Technology	2,200,000	4,650,000	3,608,125	1,041,875
45	Transportation Site and Facility Improvements	7,000,000	21,036,100	16,843,027	4,193,073
46	Verne Duncan Elementary Bond	126,555	126,555	85,333	41,222
47	View Acres Elementary School	3,224,886	3,859,886	3,713,244	146,642
48	Wichita Family Support Center	4,107,603	-	-	-
49	Wilbur D. Rowe Middle School	17,500,001	19,340,001	18,593,767	746,234
50	Contingency	38,310,402	(5,243,524)	-	(5,243,524)
<b>TOTAL</b>	<b>465,790,000</b>	<b>518,782,614</b>	<b>500,508,449</b>	<b>18,274,165</b>	

# Financial Statement

<b>BOND PROCEEDS FUND</b>		
<b>Income Statement</b>		
<b>4/30/21</b>		
<b>REVENUE</b>		
Bond Proceeds (2017 & 2018 Sales)	479,956,514	
Oregon School Capital Improvement Matching Program	2,700,000	
Clackamas County Development Agency	2,500,000	
State of Oregon Seismic Grant (Sunnyside and Whitcomb)	3,000,000	
State of Oregon Seismic Grant (Owen Sabin)	2,043,500	
Community Development Block Grant	90,000	
Transportation Financing	11,036,100	
Investment Interest Earnings	17,437,838	
<b>TOTAL REVENUE</b>		518,763,952
<b>EXPENDITURES TO DATE</b>		
Salaries & Associated Payroll Benefits	4,634,064	
Land - Acquisition	29,626,857	
Buildings - Improvement	397,576,420	
Improvements Other Than Buildings	23,017,596	
<b>TOTAL EXPENDITURES</b>		454,854,937
<b>Bond Cash Balance</b>		<b>63,909,015</b>

# Financial Forecast

<b>BOND PROCEEDS FUND</b> <b>Financial Revenue Forecast</b> <b>4/30/21</b>	
<b>Voters Passed bond levy November 2016</b>	433,000,000
First Bond Sale March 2017	322,642,626
First Bond Sale Premiums	30,870,341
<b>Total First Bond Sale</b>	<u>353,512,967</u>
Second Bond Sale December 2018	110,357,000
Second Bond Sale Premiums	16,086,546
<b>Total Second Bond Sale</b>	<u>126,443,546</u>
<b>Other Sources of Revenue:</b>	
State of Oregon Seismic Grant (Sunnyside and Whitcomb)	3,000,000
State of Oregon Seismic Grant (Owen Sabin)	2,500,000
Oregon School Capital Improvement Matching Program	2,700,000
Clackamas County Development Agency	2,500,000
Community Development Block Grant	90,000
Transporation Financing	11,036,100
<b>Total Other Sources of Revenue</b>	<u>21,826,100</u>
<b>Other "Forecasted" Sources of Revenue</b>	
Total Interest Earnings "Forecasted"	17,000,000
Transfer from Capital Projects Fund "Forecasted"	-
<b>Total Other "Forecasted" Sources of Revenue</b>	<u>17,000,000</u>
<b>Grand Total "Forecasted" Bond Funds</b>	<u><u>518,782,614</u></u>

# Corporate Activity Tax

# Bond Program Reserve Projections

North Clackamas School District Bond Program Program Reserve Budget May 19, 2021			
This document tracks and forecasts the bond program reserve (AKA program contingency). The program reserve provides funds for added scope of work, unknown and unforeseen conditions, and costs that exceed estimates. It is anticipated that most projects will receive an allocation from the reserve. It accounts for: (1) Actual transfers to and from the reserve to projects (2) Projected potential transfers to and from the reserve (3) Projected potential additional resources to the reserve. In general, forecasts are only on projects in the planning or construction phases, so the list of Projected transfers will grow in the future. The information on this document will change frequently as more information is known. <b>RED FONT INDICATES A REVISION FROM THE FEBRUARY 17, 2021 PROGRAM RESERVE DOCUMENT PROVIDED TO THE COMMUNITY BOND OVERSIGHT COMMITTEE.</b>			
	Project / Item	Total	Comments
1	Original Program Reserve (May 21, 2018 Budget)	\$38,310,402	
2	<b>Program Reserve Transfers:</b>		
3	Additional Premiums not Captured from First Bond Sale	\$870,341	
4	Adrienne C. Nelson High School	-\$22,900,000	Construction cost estimates exceed the budget as a result of increased material costs, labor shortages and the general demand for construction resources in the Portland Metro area. Amount reduced from \$23.5 million to \$22.9 million based on positive bid results and Green Energy Technology requirement completed at Sabin Schellenberg project.
5	Adrienne C. Nelson High School Site Acquisition	\$1,611,919	Property was purchased for less than budget amount
6	Alder Creek Middle School	-\$2,400,000	For additional scope (e.g. gym painting, wall pads, replacing classroom projectors with monitors). Guaranteed Maximum Price exceeds budget due to scope increases and unforeseen conditions.
7	Americans with Disabilities Act	\$4,000,000	Transferring funds to central reserve for distribution if / as needed versus transferring to individual projects. Accounting for improvements separately.
8	Ardenwald Elementary School	-\$250,000	Moved -\$200,000 from Projected Transfer section and added \$50,000 for costs exceeding estimates
9	Beatrice Morrow Cannady Elementary School	\$4,533,427	Moved -\$220,000 (plus additional -\$20,000) from Projected Transfer section. Surplus reduced for parking lot and added site work. Surplus includes a savings of \$3,073,427 from bid results and a \$2,000,000 savings associated with a reduction in Project contingencies. Moved additional -\$300,000 from Projected Potential Transfer section.
10	Bilquist Elementary School	\$456,000	Moved from Projected Transfer section and reduced \$44,000
11	Bond Management Budget	-\$4,808,858	Insurance program and bond sales costs not in previous budget
12	Bond Premiums Associated with Second Bond Sale	\$16,086,546	
13	Clackamas High School East / Phase One	-\$1,076,480	Amount reduced \$271,520 from Projected Transfer amount (with \$21,520 increase). Addition of two classrooms, toilet room and corridor.
14	Clackamas High School East / Phase Two Additional Scope	-\$1,375,000	Moved from Projected Transfer section. Anticipated scope of work exceeds budget. Added \$625,000 for additional renovation scope

## Bond Program Reserve Projections (continued)

74	Wilbur D. Rowe Middle School	\$400,000	Forecasted balance after audit is completed
75	<b>Subtotal Projected Potential Program Reserve Transfers</b>	<b>\$9,981,000</b>	Total of Line 53 to Line 74
76	<b>Total Program Reserve Transfers and Projected Potential Transfers</b>	<b>-\$33,572,926</b>	Total of Line 50 + Line 75
77	<b>Program Reserve Balance</b>	<b>\$4,737,476</b>	Total of Line 1 + Line 76

Reasons for projects budget increases are typically categorized as: Unknowns, Unforeseens, Increased Scope, Agency Requirements, actual bids exceeded estimates, initial estimates exceed initial budgets.

The following are examples:

Unknowns / Unforeseens: Discovered hazard materials, poor soil conditions, dry rot, bad pipes, or as-built conditions are not as originally designed or specified.

Increased Scope: Additional roofing, asphalt, flooring, painting, door replacements, and/or additional improvements determined by the Bond Steering Committee as a priority and appropriate to complete as part of the project.

Agency Requirements: Often the agency having jurisdiction will require additional improvements after the project has started. These could include adding or changing sidewalks, adding landscaping, adding or changing other electrical, plumbing, carpentry, safety components to the building

## Completed Projects Update (30 of 41 Projects)

1. Alder Creek Middle School Renovation (stadium field and track replacement scheduled 2021)
2. Athletic Field Improvements: Clackamas High School
3. Athletic Field Improvements: Rex Putnam High School
4. Beatrice Morrow Cannady Elementary School (new)
5. Bilquist Elementary School Improvements
6. Clackamas High School East - Phase 1 Classroom Addition
7. Clackamas High School West - Front Canopy Repair
8. District Stadium at Alder Creek Middle School Replacement
9. Facility Operations Phase 1 & Phase 2 Improvements
10. Happy Valley Middle School Addition
11. Linwood / Sojourner Elementary Schools Improvements
12. Lot Whitcomb Elementary School Renovation
13. Milwaukie El Puente Elementary School
14. Milwaukie High School/Milwaukie Academy of the Arts Replacement & Renovation
15. Milwaukie High School Field Improvements (Includes Lake Road Fields and Rowe Middle School Field)
16. Mount Scott Elementary Classroom and Cafeteria Addition
17. Mount Scott Elementary School Improvements
18. Oak Grove Elementary School Improvements
19. Oregon Trail Elementary School Improvements
20. Owen Sabin/Ben Schellenberg Professional Technical Center/Land Lab Improvements/Technology Information Services
21. Rex Putnam High School Improvements (stadium field and track replacement scheduled 2021)
22. Rex Putnam Student Health Center
23. Riverside Elementary School Improvements
24. Seth Lewelling Elementary School Improvements
25. Sunnyside Elementary School Renovation
26. Transportation Facility Improvements Phase 1
27. Transportation Facility Phase 3A (Site work & new driveway)
28. Verne Duncan Elementary School Improvements
29. Wilbur Rowe Middle School Renovation
30. View Acres Elementary School Improvements

## Completed Projects Update - continued (30 of 41 Projects)

Clackamas High School Stadium Field Turf and Track Replacement

Transportation Facility Improvements Phase 2 (Elevator)

Security Fencing

Security Door Hardware (for Lockdowns)

Property Acquisition:

1. Future Middle School Property near Rock Creek Middle School
2. Hood View Park (for Adrienne C. Nelson High School)
3. Transportation Properties (phase 1 and phase 2)



Technology Warehouse

## Progress on Projects in Construction (7 of 41 Projects)

1. Adrienne C. Nelson High School
2. **Clackamas High School Improvements  
Phase 2 - East**
3. **Clackamas High School Improvements -  
West**
4. **Clackamas High Student Health Center  
Addition - West**
5. **Happy Valley Elementary School  
Improvements**
6. **Happy Valley Middle School Improvements**
7. New Urban High School Replacement  
**\*Transportation Facility Phase 3B (site work &  
new shop)**

# Milwaukie High - welcoming students back



# Adrienne C. Nelson - almost ready!



# New Urban High School - coming soon!



## Progress on 2020/2021 Projects in Design (4 of 41 Projects)

1. Ardenwald Elementary School Improvements
2. Hector Campbell Elementary School Improvements
3. Scouters Mountain Elementary School Improvements
4. Spring Mountain Elementary School Improvements

## Future Projects 2021/2022

1. Miscellaneous small projects (TBD)
2. Warranty phase / work
3. Project and program closeout process and documentation

# Questions

North Clackamas School District  
Inclusion & Diversity in Contracting Report  
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November 2016 Bond Measure  
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11	Linwood / Sojourner Elementary Schools Improvements	May 2018	May 2019	September 2019	
12	Lot Whitcomb Elementary School Improvements and Additions	January 2017	January 2018	September 2018	
13	Milwaukie / El Puente Elementary Schools	June 2018	June 2019	October 2020	Phased-substantial completion: <del>October: Building interior. November: Covered play structure. December: Added scope -additional parking lot. Schedules impacted by Covid-19, wildfires, and smoke.</del>
14	Milwaukie High School/Milwaukie Academy of The Arts	December 2016	March 2018	Summer 2020	
15	Milwaukie High School / Lake Road Athletic Fields Renovations	June 2017	June 2018	Winter 2019	
16	Mount Scott Elementary School Classroom and Cafeteria Addition	September 2016	June 2017	January 2018	
17	Mount Scott Elementary School Improvements	May 2017	May 2018	December 2018	
18	Oak Grove Elementary School Improvements	April 2017	June 2018	December 2018	
19	Oregon Trail Elementary School Improvements	June 2019	May 2020	September 2020	
20	Owen Sabin/Ben Schellenberg Professional Technical Center/Land Lab Improvements/Technology Information Services	January 2018	March 2019	Winter 2020	
21	Rex Putnam High School Improvements (Stadium field & Track 2021)	January 2018	June 2019	September 2019	
22	Rex Putnam High School Health Center Addition	September 2016	May 2017	November 2017	
23	Riverside Elementary School Improvements	June 2019	June 2020	December 2020	
24	Seth Lewelling Elementary School Improvements and Addition	April 2017	June 2018	February 2019	
25	Sunnyside Elementary School Improvements	January 2017	April 2018	February 2019	
26	Transportation Facility Improvements Phase 1	Winter 2017	Winter 2018	October 2018	
27	Transportation Facility Phase 3A (Site work & new driveway)	March 2018	Spring 2020	Summer 2020	
28	Verne A. Duncan Elementary School Improvements	June 2018	October 2018	March 2019	
29	Wilbur D. Rowe Middle School and Field Improvements	May 2017	June 2018	October 2019	
*	Transportation Facility Improvements Phase 2 (Elevator)	March 2018	May 2019	Winter 2020	
30	View Acres Elementary School Improvements	June 2019	June 2020	September 2020	Building-substantially complete. Field work and walk path-remaining.
<b>Projects In Construction</b>					
31	Adrienne C. Nelson High School	June 2017	June 2019	August 2021	Substantial Completion expected Spring 2021
32	Clackamas High School Improvements: Phase 2 - East	May 2020	May 2021	September 2021	Moved from Projects In Design section.
33	Clackamas High School Improvements - West	May 2020	May 2021	September 2021	Moved from Projects In Design section.
34	Clackamas High School Student Health Center Addition - West	May 2020	May 2021	September 2021	Moved from Projects In Design section.
35	Happy Valley Elementary School Improvements	May 2020	May 2021	September 2021	Moved from Projects In Design section.
36	Happy Valley Middle School Improvements	May 2020	May 2021	September 2021	Moved from Projects In Design section.
37	New Urban High School Replacement	December 2018	May 2020	September 2021	Moved from Projects In Design section.
*	Transportation Facility Phase 3B (Site work & new shop)	March 2018	Spring 2021	Fall 2021	Moved from Projects In Design section.
<b>Projects In Design</b>					
38	Ardenwald Elementary School Improvements	June 2020	June 2021	September 2021	
	<del>Clackamas High School Improvements: Phase 2 - East</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects In Construction section.
	<del>Clackamas High School Improvements - West</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects In Construction section.
	<del>Clackamas High School Student Health Center Addition - West</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects In Construction section.
	<del>Happy Valley Elementary School Improvements</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects In Construction section.
	<del>Happy Valley Middle School Improvements</del>	<del>May 2020</del>	<del>May 2021</del>	<del>September 2021</del>	Moved to projects In Construction section.
39	Hector Campbell Elementary School Improvements	June 2020	June 2021	September 2021	
40	Scouters Mountain Elementary School Improvements	June 2020	June 2021	September 2021	
41	Spring Mountain Elementary School Improvements	May 2020	June 2021	September 2021	
*	Transportation Facility Phase 3B (Site work & new shop)	March 2018	Spring 2021	Fall 2021	Moved to projects In Construction section. -Project in phases-to accommodate school bus services
<b>Future Projects</b>					
	Miscellaneous small projects (TBD)	TBD	TBD	TBD	
	Warranty phase / work				Until 12 months after substantial completion
	Project and program closeout process and documentation				

North Clackamas School District  
Bond Program  
Program Reserve Budget  
May 19, 2021

This document tracks and forecasts the bond program reserve (AKA program contingency). The program reserve provides funds for added scope of work, unknown and unforeseen conditions, and costs that exceed estimates. It is anticipated that most projects will receive an allocation from the reserve. It accounts for: (1) Actual transfers to and from the reserve to projects (2) Projected potential transfers to and from the reserve (3) Projected potential additional resources to the reserve. In general, forecasts are only on projects in the planning or construction phases, so the list of Projected transfers will grow in the future. The information on this document will change frequently as more information is known. **RED FONT INDICATES A REVISION FROM THE FEBRUARY 17, 2021 PROGRAM RESERVE DOCUMENT PROVIDED TO THE COMMUNITY BOND OVERSIGHT COMMITTEE.**

	Project / Item	Total	Comments
1	Original Program Reserve (May 21, 2018 Budget)	\$38,310,402	
2	<b>Program Reserve Transfers:</b>		
3	Additional Premiums not Captured from First Bond Sale	\$870,341	
4	Adrienne C. Nelson High School	-\$22,900,000	Construction cost estimates exceed the budget as a result of increased material costs, labor shortages and the general demand for construction resources in the Portland Metro area. Amount reduced from \$23.5 million to \$22.9 million based on positive bid results and Green Energy Technology requirement completed at Sabin Schellenberg project.
5	Adrienne C. Nelson High School Site Acquisition	\$1,611,919	Property was purchased for less than budget amount
6	Alder Creek Middle School	-\$2,400,000	For additional scope (e.g. gym painting, wall pads, replacing classroom projectors with monitors). Guaranteed Maximum Price exceeds budget due to scope increases and unforeseen conditions.
7	Americans with Disabilities Act	\$4,000,000	Transferring funds to central reserve for distribution if / as needed versus transferring to individual projects. Accounting for improvements separately.
8	Ardenwald Elementary School	-\$250,000	Moved -\$200,000 from Projected Transfer section and added \$50,000 for costs exceeding estimates
9	Beatrice Morrow Cannady Elementary School	\$4,533,427	Moved -\$220,000 (plus additional -\$20,000) from Projected Transfer section. Surplus reduced for parking lot and added site work. Surplus includes a savings of \$3,073,427 from bid results and a \$2,000,000 savings associated with a reduction in Project contingencies. Moved additional -\$300,000 from Projected Potential Transfer section.
10	Bilquist Elementary School	\$456,000	Moved from Projected Transfer section and reduced \$44,000
11	Bond Management Budget	-\$4,808,858	Insurance program and bond sales costs not in previous budget
12	Bond Premiums Associated with Second Bond Sale	\$16,086,546	
13	Clackamas High School East / Phase One	-\$1,076,480	Amount reduced \$271,520 from Projected Transfer amount (with \$21,520 increase). Addition of two classrooms, toilet room and corridor.
14	Clackamas High School East / Phase Two Additional Scope	-\$1,375,000	Moved from Projected Transfer section. Anticipated scope of work exceeds budget. Added \$625,000 for additional renovation scope

15	Clackamas High School - West	-\$2,100,000	Moved from Projected Transfer section and consolidated health center projected transfer on one line. Remodel spaces for Adult Transition Program & Life Enrichment Education Program (LEEP). In addition, base scope forecasted expenses exceeding budget.
16	District Stadium at Alder Creek Middle School	-\$5,200,000	Not an original Bond commitment. Moved additional -\$200,000 from Projected Potential Transfer section
17	District-wide projects	\$433,000	Moved from Project Transfer section. Expenses for district-wide projects less than budgeted
18	Energy Efficient Measures	\$2,500,000	Transferring funds to central reserve for distribution if / as needed versus transferring to individual projects. Accounting for improvements separately.
19	Estimated Interest Income Associated with both Bond Sales	\$15,000,000	Interest earned on bond funds prior to being expended.
20	Facility Operations Phases One and Two	\$500,000	Forecasted balance increased due to fire insurance reconciliation, audit, and prices less than estimates.
21	Happy Valley Middle School Addition	\$476,450	Expenses more than budget
22	Linwood / Sojourner Elementary Schools	\$1,020,000	Expenses more than budget
23	Lot Whitcomb Elementary School	\$300,000	Expenses less than budget
24	Middle School Covered Play	\$2,000,000	Moved remainder balance into reserves for distribution to schools as needed.
25	Middle School Site Purchase Budget Balance	\$2,269,469	Property was purchased for less than budget amount.
26	Milwaukie/El Puente Elementary Schools Additional Classroom	-\$1,125,000	Moved -\$350,000 from Projected Transfer section for added scope: E.g. Playground improvements, additional drainage, parking lot modifications, water intrusion abated, HVAC changes, and increased -\$10,000 for costs exceeding estimates. Additional scope of work associated with renovations to add a 25th classroom, added scope: e.g. Intercom replacement and replacement of majority of furnishing throughout, added \$300,000 for unknowns/unforeseens and expenses exceeding estimates for additional parking lot and furnishings
27	Milwaukie High School/Milwaukie Academy of The Arts	-\$19,370,000	Construction cost estimates exceed the budget as a result of increased material costs, labor shortages and the general demand for construction resources in the Portland Metro area
28	Mount Scott Elementary School Classroom and Cafeteria Addition / Initial Transfer	-\$524,000	Bid results exceeded budget.
29	Mount Scott Elementary School Classroom and Cafeteria Addition / Second Transfer	-\$325,000	Unknown / unforeseen conditions - Underground utilities, agency requirements.
30	New Urban High School	-\$15,161,177	Construction cost estimates exceed the budget as a result of an increase in scope of work to replace the main building and material costs, labor shortages and the general demand for construction resources in the Portland Metro area. Additional funds added to replace the gym bldg. as part of main bldg. replacement.
31	Oak Grove Elementary School	-\$710,000	Moved \$120,000 from projected transfer section (after reduction of \$110,000 for expenses exceeding estimates). Bid results exceeded budget.
32	Oregon Trail Elementary School Playground Equipment Replacement	-\$2,280,672	For additional roof replacement, ceiling tiles, misc. maintenance items, generator, intercom, and misc. improvements.

33	Owen Sabin / Ben Schellenberg Professional Technical Centers / Land Lab / Technology Information Services	-\$8,194,000	Moved -\$1,100,000 from Project Transfer section plus -\$120,000 for added scope. Added scope: Technology and Information Services replacement warehouse, ADA elevator, and equipment, furnishings, structural unknowns/unforeseens. Construction cost estimates exceed the budget as a result of an increase in scope of work and material costs, labor shortages and the general demand for construction resources in the Portland Metro area.
34	Property Debt	-\$2,121	Additional unforeseen expenses
35	Reconciliation of initial Bond Sale Amount	-\$373	Adjustment for actual amount of first bond sale in March 2017
36	Rex Putnam High School Student Health Center	-\$361,000	Bid results exceeded budget.
37	Riverside Elementary School	-\$2,055,000	Move -\$500,000 from Projected Transfer section and added -\$50,000 for forecasted expenses exceeding estimates. Added scope in office renovation, separate office entrance, kitchen and misc. maintenance items. Added \$450,000 for additional required fire sprinkler work
38	Security, Cameras and Fencing	\$200,000	Net positive transfer into reserves from Security, Cameras & Fencing line item. Moved -\$1.1 million from Projected Potential Transfer, plus -\$700,000 for Security Task force recommendations, secured entries, and emergency power to essential systems (security, card access, fire, data, cameras, intercom, phones, shelter areas, office power)
39	Seth Lewelling Elementary School	-\$1,550,000	Addition of classroom, consolidation of offices, increased secured pathway scope and modular removed to accommodate Bond requirements
40	Structured Learning Centers	\$500,000	Transferring funds to central reserve for distribution if / as needed vs. transferring to individual projects. Accounting for improvements separately.
41	Sunnyside Elementary School	-\$2,725,000	Guaranteed Maximum Price exceeds budget. Increase resulted from unforeseen conditions and an increase in project scope.
42	Technology	-\$2,450,000	Added -\$1,950,000 district-wide replacing projectors with classroom monitors project. Includes funds to purchase and install District wide emergency radio system
43	Transfer additional interest earnings	\$2,000,000	Interest earnings exceeded initial estimates
44	Transportation Financed Funding	\$11,036,100	Funds financed and repaid with State reimbursements
45	Transportation Site and Facility Improvements	-\$11,036,100	Transfer financed funding to the Transportation project
46	Transportation Site Acquisition and Facility Improvements	-\$3,000,000	Site Acquisition Budget: \$7 million plus projected \$3 million transfer provides the following: Initial property acquisition (6.1 acres), additional acquisition (2 acres), site improvements to 6.1 acre lot, improvements to building on site and a new modular building.
47	View Acres Elementary School	-\$635,000	\$500,000 previously transferred from Structured Learning Centers Budget for View Acres Learning Center remodel, plus \$135,000 remaining funds needed for second classroom (added scope).
48	Wichita Family Support Center	\$4,107,603	North Clackamas School District no longer owns Wichita. Wichita was sold to North Clackamas Parks & Recreation District
49	Wilbur D. Rowe Middle School	-\$1,840,000	Additional interior improvements required to complete bond requirements
50	<b>Subtotal Program Reserve Transfers</b>	<b>-\$43,553,926</b>	Total of Line 3 to Line 49
51	<b>Subtotal Revised Program Reserve Including Program Reserve Transfers</b>	<b>-\$5,243,524</b>	Total of Line 1 + Line 50

52	<b>Projected Potential Program Reserve Transfers</b>		
53	Alder Creek Middle School	-\$100,000	Forecasted final costs exceeds budget. Pending audit completion
54	<del>Ardenwald Elementary School Paved Walking Path</del>	<del>-\$200,000</del>	<del>Moved to actual transfer section. Added Scope. Amount reduced from -\$250,000 to -\$200,000</del>
55	<del>Beatrice Morrow Cannady Elementary School</del>	<del>-\$220,000</del>	<del>Increased -\$20,000. Final expenses exceeded estimates and added scope for required site drainage</del>
56	Bond Management	-\$1,900,000	Accountants determined property debt does not need to be accounted for in Bond Management. <del>Preliminary estimate to account for insurance and bond management expenses for additional bond work and schedule (paid for by additional bond funds from interest earnings, premiums, seismic grants, and financing).</del>
57	Campbell Center	\$700,000	Forecasted expenses less than budget
58	<del>Clackamas High School East / Phase Two Additional Scope</del>	<del>-\$1,375,000</del>	<del>Moved to actual transfer section. Anticipated scope of work exceeds budget. Added \$625,000 for additional renovation scope</del>
59	<del>Clackamas High School Student Health Center</del>	<del>-\$500,000</del>	<del>Moved to actual transfer section and consolidated to line below. Recent bid results indicate budget may not be adequate to align with 2017 PHS health center costs &amp; inflation</del>
60	<del>Clackamas High School West</del>	<del>-\$1,600,000</del>	<del>Moved to actual transfer section and consolidated with line above. Added \$600,000 for added scope and estimates exceeding budget: Remodel spaces for Adult Transition Program &amp; Life Enrichment Education Program (LEEP). In addition, base scope forecasted expenses exceeding budget.</del>
61	Clackamas High School West and Rex Putnam High School Athletic Fields	\$450,000	Expenses anticipated to be less than budget. Reduced \$150,00 to complete additional projects.
62	<del>District wide projects</del>	<del>-\$433,000</del>	<del>Expenses for district wide projects less than budgeted</del>
63	<del>Milwaukie El Puente Elementary School</del>	<del>-\$350,000</del>	<del>Moved to actual transfer section. Added scope: E.g. Playground improvements, additional drainage, parking lot modifications, water intrusion abated, HVAC changes, and costs exceeding estimates.</del>
64	Milwaukie High School/Milwaukie Academy of The Arts	\$5,532,000	Preliminary estimates show expenses less than budget. Added \$2,032,000.
65	Oregon Trail Elementary School	\$200,000	Forecasted expenses at project closeout less than budget.
66	<del>Owen Sabin Ben Schellenberg Professional Technical Center</del>	<del>-\$1,100,000</del>	<del>Added scope, fixtures, furnishings, and equipment, and unknown / unforeseen conditions</del>
67	Property sale	\$3,500,000	Forecasted sale of surplus property purchased with bond funds
68	Rex Putnam High School	\$40,000	Expenses less than budgeted
69	<del>Riverside Elementary School</del>	<del>-500000</del>	<del>Moved to actual transfer section. Complete fire sprinkler system in North Wing and added scope</del>
70	Scouters Mountain Elementary School	\$159,000	Actual expenses less than budgeted
71	Security, Cameras and Fencing	-\$800,000	Added -\$300,000 to replace older security cameras district-wide and -\$300,000 for additional scope to complete secure entry project. Forecasted expenses to complete secure entries project
72	<del>Seth Lewelling Elementary School</del>	<del>-\$70,000</del>	<del>Final expenses less than budget. Added scope: Added site drainage, concrete curb, and replaced concrete on site</del>
73	Taxes: Corporate Activities Tax	-\$100,000	Preliminary: TBD. Corporate Activity Tax impacts yet to be determined across current and future projects and not covered in project budgets. Projected to cover potential costs in project budgets. Reduced from \$500,000

74	Wilbur D. Rowe Middle School	\$400,000	Forecasted balance after audit is completed
75	<b>Subtotal Projected Potential Program Reserve Transfers</b>	<b>\$9,981,000</b>	Total of Line 53 to Line 74
76	<b>Total Program Reserve Transfers and Projected Potential Transfers</b>	<b>-\$33,572,926</b>	Total of Line 50 + Line 75
77	<b>Program Reserve Balance</b>	<b>\$4,737,476</b>	Total of Line 1 + Line 76

Reasons for projects budget increases are typically categorized as: Unknowns, Unforeseens, Increased Scope, Agency Requirements, actual bids exceeded estimates, initial estimates exceed initial budgets.

The following are examples:

Unknowns / Unforeseens: Discovered hazard materials, poor soil conditions, dry rot, bad pipes, or as-built conditions are not as originally designed or specified.

Increased Scope: Additional roofing, asphalt, flooring, painting, door replacements, and/or additional improvements determined by the Bond Steering Committee as a priority and appropriate to complete as part of the project.

Agency Requirements: Often the agency having jurisdiction will require additional improvements after the project has started. These could include adding or changing sidewalks, adding landscaping, adding or changing other electrical, plumbing, carpentry, safety components to the building