

LANE EDUCATION SERVICE DISTRICT	BOARD MEETING
1200 Hwy 99 N	Tuesday, May 6, 2025
Eugene, Oregon 97402	Regular Meeting: 6:00 PM

**LANE ESD BOARD MEETING
AGENDA**

Tuesday, May 6, 2025

1. 5:15 PM Budget Committee Meeting

By law, the budget committee is charged with making recommendations concerning financial priorities. The budget committee will have the responsibility for reviewing the financial program of Lane ESD, reviewing the proposed ESD budget as presented by the superintendent and recommending an annual ESD budget in keeping with the provisions of applicable state laws.

Educational policy decisions, however, are the responsibility of the Board, not the budget committee. The committee does not have the authority to add programs or to approve additional personnel or increase salaries. While the committee may, in effect, delete programs because of a fund decrease in arriving at a levy figure, the committee is charged primarily with a fiscal evaluation of programs. The committee may, alternatively, recommend an amount that changes the proposed budget and may request the administration make such changes in accordance with priorities set by the Board.

The budget committee consists of the elected Board members and eight members appointed by the Board from component school district boards or designees of component district Boards.

A majority of the constituted committee is required for passing an action item. Majority for a 15-member budget committee is 8. Therefore, if only eight members are present, a unanimous vote is needed for passing an action.

As provided by law, the committee will hear the budget message presented by the superintendent, receive the budget document, listen to comments and suggestions by patrons and announce the time and place for its future meetings. All meetings of the budget committee are open to the public.

The budget committee may request any information for the preparation or revision of the budget document from any ESD officer or employee. It may request the attendance of any employee at its meetings. Such requests by the budget committee should be made through the superintendent and/or budget officer. The budget committee will approve the budget document as submitted

by the superintendent or as subsequently revised by the committee. After approval of the original or revised budget document, the budget committee's duties cease. The hearing on the approved budget is held by the Board.

Board Chair, Superintendent

Lane ESD 2025-2026 Proposed Budget

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A. Welcome and Introductions

Welcome and Introductions

Board Chair

B. Election of Officers

The Lane ESD Board Chair will call for nominations for Presiding Officer of the meeting.

Board Chair

1. Nominations for Presiding Officer

The Board Chair will call for nominations for a Presiding Officer for the Budget Committee meeting.

C. Presentation of Superintendent's Budget Message

Superintendent Tony Scurto will present the 2025-26 Superintendent's Budget Message.

Tony Scurto, Superintendent

D. Review of Proposed Budget Document

Olivia Meyers Buch will review the 2025-26 proposed budget.

Olivia Meyers Buch, Executive Director of Business Services

E. Committee Discussion

The Budget Committee will discuss the presentation of the Budget and ask any questions they may have.

Budget Committee

F. Public Comment(s)

This is an opportunity for the audience to address the Budget Committee on topics related to the Budget Committee proceedings.

Please send written public comments or testimony to supt-office@lesd.k12.or.us to be included in the Board packet:

- Clearly label the subject line as: “Budget Committee” or “Budget Committee Testimony” and include the topic. Example: “Public Comment: Funding.”
- Public comments or testimony submitted the morning of the Board meeting or during the Board meeting will be posted within 48 business hours.

The Lane Education Service District Board and Budget Committee values public input.

Presiding Officer

G. Committee Action

- Motion to approve the budget and tax rate, **-OR-**
- Continue to next scheduled Budget Committee meeting date of May 20, 2025 at 5:30 p.m.
- Directions to superintendent and staff for information needed for next meeting.

Sample motion language:

I move to approve the budget for 2025-26 in the amount of \$79,368,711 for all funds. Further, I move to approve a permanent tax rate of \$0.2232 per \$1,000 of assessed value to be levied for operating purposes.

Presiding Officer

H. Adjourn Budget Committee

The Budget Committee Presiding Officer will adjourn the Budget Committee meeting.

Presiding Officer

2. 6:00 PM Call Regular Meeting To Order

Board Chair

3. Welcome

Guests attending the meeting will be introduced.

Board Chair

4. Lane Education Service District Statement of Accountability: Land Acknowledgement

Lane ESD acknowledges that the lands we call Lane County - the lands that sustain our children, our future, and our collective well-being - are the traditional

ancestral home of the Kalapuya, Siuslaw, Molalla, and other indigenous people who have lived in Lane County since time immemorial. Native children, families, and communities bear witness to a legacy of displacement and forced relocation. As an educational institutions we are accountable for addressing the current and former silencing, erasure and genocide of native people in Oregon and Turtle Island. We aim to join with indigenous people, honoring their resilience, courage, and self-determination in a purposeful pursuit of justice.

Today indigenous people -- alive, diverse, and vibrant -- live in and contribute to the culture of Lane County. We are all blessed by their presence.

Members of the Board

Lane ESD Board of Directors Land Acknowledgement

5. Public Participation

This is an opportunity for the audience to address the Board on topics either on, or not on, the agenda. There will also be opportunities for the audience to comment on specific agenda items as the Board addresses them.

Comments Regarding Staff Members - Speakers may offer objective criticism of ESD operations and programs. The Board will not hear comments regarding any individual ESD staff member. The Board chair will direct the visitor to the procedures in Board policy KL - Public Complaints for Board consideration of a complaints involving a staff member. The association contract governing the employee's rights will be followed. A commendation involving a staff member should be sent to the superintendent, who will forward it to the staff member, his/her supervisor and the Board.

The Board requests that a public comment add information or a perspective that has not already been mentioned previously, and that the patron refrains from repeating a similar point. To make a comment or present a topic during public comment, if the opportunity is available on the Board agenda, please complete the Intent to Speak card and submit it to the Board secretary prior to the start of the meeting. An individual that has submitted an Intent to Speak card and has been invited to speak by the Board chair, will be allowed three minutes.

Any person, who is invited by the Board chair to speak to the Board during a meeting, should state his/her name and address and, if speaking for an organization, the name of the organization. A spokesperson should be designated to represent a group with a common purpose.

6. Agenda Review

Board Chair

7. Presentation: Lane STEM

LaneSTEM is a program operated by the School Improvement Department. This presentation will introduce the board to our team and their mission as well as a sample of projects we have been working on this year followed by an opportunity for the board to ask questions.

Presenters: Maddy Ahearn, Dustin Dawson, Gabriell Gellon, Krista Hocker, Hanna Hostick

Superintendent

8. Action Items

Board Chair

A. Consent Agenda

The Lane ESD Board of Directors has agreed to implement a consent agenda. All items in the consent agenda are adopted by a single motion unless a member of the Board or the Superintendent requests that such item be removed from the consent agenda and acted upon separately.

Generally, consent agenda items are matters which members of the Board agree are routine in nature and should be acted upon in one motion to conserve time and to enable the Board to focus on the other matters on the agenda.

Back-up materials for consent agenda items are included in the agenda packet as needed. Minutes of this meeting will reflect action on each item.

If any board member wishes to withdraw any consent group item, it will be moved to the appropriate section of the agenda.

BE IT RESOLVED that the Board of Directors of Lane ESD adopts the consent group as submitted and listed below.

1. Human Resource Report, dated May 2, 2025

Board Chair

HR Board Report - May 2025

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B. Accept Financial Report

BE IT RESOLVED that the Board of Directors of Lane ESD accepts the Financial Report for March 2025.

Board Chair

March 2025 Financial Report

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C. Teacher Appreciation Week Proclamation

National Teacher Day is May 6, 2025, and National Teacher Appreciation Week is **May 5-9, 2025**. This year, we're joining together to listen to and stand with teachers and uniting to take action and demand our leaders provide the resources and respect educators deserve.

DIRECTOR MOVED:

WHEREAS, teachers mold future citizens through guidance and education; and

WHEREAS, teachers encounter students of widely differing backgrounds; and

WHEREAS, our country's future depends upon providing quality education to all students; and

WHEREAS, teachers spend countless hours preparing lessons, evaluating progress, counseling and coaching students and performing community service; and

WHEREAS, our community recognizes and supports its teachers in educating the children of this community.

NOW, THEREFORE, BE IT RESOLVED that the Lane Education Service District Board of Directors proclaims May 5-9, 2025 to be TEACHER APPRECIATION WEEK; and

BE IT FURTHER RESOLVED that the Lane Education Service District Board of Directors strongly encourages all members of our community to join with it in personally expressing appreciation to our teachers for their dedication and devotion to their work.

Board Chair

D. Asian American Pacific Islander Month May 2025

Background:

Asian American Pacific Islander (AAPI) Heritage Month takes place every May in the United States. Every year the AAPI Heritage Celebration Committee honors civic organizations that have achieved significant milestones in serving the community. This year, with the theme "Energizing The Next Generation," we are spotlighting the importance of youth leadership in our community.

The [Federal Asian Pacific American Council](#) (FAPAC) is pleased to announce the theme for the May 2025 Asian American, Native Hawaiian, and Pacific Islander (AANHPI) Heritage Month, "**A Legacy of Leadership and Resilience.**"

In 2025, FAPAC will celebrate four decades of service to the AANHPI community. This year's theme honors the hard work of AANHPI leaders who established a foundation for future generations to thrive and adapt to change and adversity. The 2025 AANHPI Heritage Month poster features bamboo as a symbol of strength, endurance, and resilience for its ability to withstand the harshest conditions. Bamboo's solid foundation ensures it can bend with the wind and stand tall after the storm passes. The bamboo also acknowledges the colloquial "bamboo ceiling" and the cultural, organizational, and individual barriers that hinder advancement for AANHPIs in the workplace.

Throughout history, AANHPIs have transformed adversity into opportunities for public service, efficiency, and innovation; resulting in lasting change that resonates beyond our community and has positively impacted our world. This resilience is woven into the fabric of our success, and it is a testament to the unwavering spirit of our ancestors who faced their own struggles with dignity and strength.

We pay tribute to the AANHPI trailblazers and leaders whose resilience and courage have paved the way for future generations. **Lieutenant Susan Ahn Cuddy** prevailed against anti-Asian sentiments during World War II to become the first Korean American woman in the U.S. military and the first female Navy gunnery officer. The late **Congressman Dalip Singh Saund**, the first person of Asian descent to be elected to the U.S. House of Representatives in 1956, successfully lobbied to end restrictions to citizenship for Indian and Filipino immigrants and gave Asian Americans a voice at the national level. The late **Secretary of Transportation Norman Mineta** overcame racial injustice as a child of Japanese immigrants in a World War II internment camp to serve in the U.S. Army, Congress, and the Cabinet of Presidents Bill Clinton and George W. Bush. These pioneers, often facing insurmountable barriers, have not only demonstrated exceptional leadership, but have also risked much to usher in change. Their stories of perseverance—of overcoming doubt, discrimination, and the weight of societal expectations—serve as inspiring reminders that resilience is a cornerstone of our community. Each breakthrough they achieved has laid the groundwork for those who follow, encouraging the next generation to dream boldly.

We embrace "**A Legacy of Leadership and Resilience**" as both a tribute and a call to action. We honor the achievements of those who have paved the way while igniting the passions of those who will follow. Through this theme, we strive to continue breaking barriers, honor our traditions, and inspire the next generation of AANHPI leaders.

Now, therefore, the Board of Directors of Lane ESD declares:

Asian Pacific American Heritage Month in Lane Education Service District

DIRECTOR MOVED: WHEREAS: Asian and Pacific Americans have lived and worked in Oregon for more than 200 years, contributing to the state's rich history, economy, and culture; and

WHEREAS: Asian and Pacific Americans have helped advance our community's prosperity through their contributions to all fields of education, business, the arts, economic development, science, and technology; and

WHEREAS: Asian and Pacific American history is marked by a struggle for freedom, equality, and justice, prevailing over the adversity of exclusion, persecution, incarceration, and disparities; and

WHEREAS: The vibrant history and diverse cultures of Oregon's Asian and Pacific Americans are here to be honored as a central part of our state's story and shared across all Oregon communities; and

WHEREAS: The month of May is nationally recognized as a time to celebrate contributions of Asian and Pacific Americans to our society and collective history.

THEREFORE: The Lane Education Service District Board hereby proclaims May 2025 to be ASIAN PACIFIC AMERICAN HERITAGE MONTH in Lane Education Service District.

Adopted this 6th day of May, 2025.

E. Accept Summary of Superintendent Tony Scurto Evaluation

The Superintendent Evaluation Committee, consisting of the Board Chair and Vice-Chair, will present the Superintendent Evaluation Summary for the Board's acceptance.

Board Chair, Board Vice-Chair

Superintendent Evaluation Summary 2024-25

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F. Approve Grants

Recovery High School-Level 2 Grant Form

Details

Project Name Recovery High School

Department Submitting Proposal Superintendent's Office

Person Submitting Proposal Tony Scurto

Potential Funder (please include link to RFP if available) Oregon Department of Education

Requested Funding Amount 800000

Person who will manage grant if funded Superintendent's Office

Grant Period

Length of grant Ongoing

Anticipated start date (mm/dd/yyyy) 07/01/2025

Anticipated end date (mm/dd/yyyy) 06/30/2040

Is indirect rate allowed?

Yes

Note restrictions, if any:

The budget is so tight, we may not be able to budget for indirect.

Does the funding include any state or federal funds?

Yes

Is a match required from Lane ESD or participating districts (direct funds, FTE, services)?

No

Does the grant require any commitment from the ESD or districts beyond the term of the grant?

No

Are there contracted services included in the grant that would require bid or RFP? (See Procurement policy: <http://policy.osba.org/laneesd/D/DJC%20G1.PDF>)

No

Does the grant require a 501(c)3 to apply?

No

Does the grant require "reporting" and/or updates?

Yes

What kind of reporting is being asked for?

Division 22 Compliance

Who will be doing the ongoing reporting (programmatic and fiscal responsibilities) within your department?

Superintendent and Lane ESD Board of Directors

Have you discussed the data collection and reporting needs with your data coordinator?

No

Is this proposal supported by and does it include collaboration with district partners?

Yes

Select districts eligible for participation and who have confirmed interested in participation.

Bethel

Blachly

Creswell

Crow-Applegate-Lorane

Eugene

Fern Ridge

Junction City

Lowell

Mapleton

Marcola

McKenzie

Oakridge

Pleasant Hill

Siuslaw

South Lane

Springfield

Please, provide a brief overview of the grant, including the purpose and intended outcomes.

Lane ESD would be operating a Recovery High School for students experiencing substance abuse disorder. Students would be earning credits toward a diploma while receiving in school treatment to support their recovery.

Describe how this proposal supports the equity vision and mission of Lane ESD. Vision: Building a beloved community of learners. Mission: Collaborating to empower all learners with justice- centered opportunities, equitable leadership, and a passion for lifelong learning.

Students at the Recovery High School are facing a life long challenge. The treatment offered as part of the school curriculum will place students on a trajectory to face and overcome substance abuse obstacles they currently face and will face in the future. To achieve this for every student as the school, they truly need to experience the school as a beloved community of learners.

Indicate which of Lane ESD's Equity Goals this proposal will directly address.

- 1. All decisions and actions will reflect the guiding principles and affirmations in our Equity Lens document.**
- 2. Lane ESD staff along with community partners will be equity leaders trained to dismantle systems of oppression through interrupting inequitable policies and practices by providing culturally specific curriculum that reflects the histories of our students.**
- 3. All ESD staff and educators we serve will be provided the equity tools and training needed to inspire student learning, so all youth thrive.**
- 4. Youth, from all backgrounds, will have access to highly engaging and culturally relevant learning opportunities connected to our communities and delivered by diverse, qualified, and passionate educators.**
- 5. While amplifying youth voice, we will build trusted and inclusive relationships with our families and elevate the engagement of community partners that lead to improved equitable student outcomes.**

Describe how the voices of diverse members of the community have been part of the design and implementation process of this proposal.

We have partnered with the Friends of Lane County Recovery Schools (FLCRS), a local non-profit whose board consists of community leaders and behavioral health experts specializing in substance abuse recovery. We have also had a vast amount of input from our own and district special education personnel.

How will this proposal dismantle systems of racism and oppression that might exist?

Students currently experiencing substance abuse disorder have very options for treatment and school settings that assist in their recovery. Historically, our health system has marginalized patients from communities of color. This school combines academics and health care and will utilize our Equity Lens to ensure equitable opportunities and outcomes.

Who might this proposal impact positively and who might it negatively impact?

Students with substance abuse disorders will experience positive impact. They will receive the health care they need and academic support for graduation. Some school districts may be slightly impacted negatively as enrollment in the Recovery High School will take students away from their districts. We anticipate opening with only 15 students so the negative impact should be minimal.

How will you ensure that equitable outcomes are achieved and what data will be collected to measure success?

The Recovery High School will be subject to all Oregon school and district requirements. Division 22 Standards are required to be reported annually to our Board of Directors. In addition, within 5 years, the school needs to be accredited by the national Association of Recovery Schools.

Does the grant require hiring or reallocating personnel (include stipends and temporary employment)?

Yes

Describe any increase or reallocation of FTE of current employees anticipated in the grant

We are not anticipating the reallocation of existing FTE. FTE will be hired with grant funding and outside contributions, expected from entities such as Trillium and PacificSource. The FLCRS will also provide funding and support for extracurricular activities.

Describe the number of new positions, FTE, length of employment, and type of position outlined in the proposal?

These positions will be ongoing:

Principal

2 Teachers

2 Recovery Mentors

Counselor

Therapist

If stipends are involved, describe the # of stipends and rate of pay (hourly, daily, lump sum, etc.).

Lane ESD Salary pay scales

Will the purchase of computers, software, or other equipment be required for staff hired or assigned to the grant?

Yes

In detail, please explain what equipment will be required. List the name of the software that will be used.

Laptops and curriculum related software.

Will this software store PII (Personally identifiable information)?

Yes

What use of facilities are anticipated (workspace, training space, meeting space)? If applicable, please include use during weekends and break periods.

We plan for the school to be located on the 3rd floor of the PeaceHealth Behavior Health building in the University District. PeaceHealth is offering the space rent-free with the exception of utilities and other minor charges.

What other internal supports at Lane ESD will you need for the project to succeed?

It is likely that the recovery school will need assistance from our special education department, school improvement, human resources, technology and administration.

Will the proposal require partnership with agencies other than our component districts?

Yes

Which agencies will Lane ESD partner with during the proposed project?

Friends of Lane County Recovery Schools

Lane County

PacificSource

Trillium

PeaceHealth

Other partnerships will likely emerge as the school gets up and running.

What grant funding, or in kind support will these partners receive?

We expect these partners to contribute to the financial operation of the school.

Does the project involve research that requires the human subjects' releases?

No

Superintendent Scurto

G. Adopt Policies, Section C

Recommendations from Policy Committee:

Delete Policies

CA/CAA

CBAA

CBE

CBF

CK

CL

Adopt with recommended changes Policies

CB

CBB

CBC/CBD

CBG

CC

CCGA

CH

CHA

CHCA

CHD

CI

CPA

Superintendent

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CB 142

CBAA 144

CHD 145

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9. Discussion/Reports

A. Legislative Update

Superintendent Scurto will provide an update in legislative activities if there are any updates.

Superintendent Tony Scurto

B. Superintendent Report

Superintendent Tony Scurto

C. Policy Updates: First Read, Section D

The Board shall exercise its rule-making power by adopting policies consistent with the Oregon Revised Statutes, Oregon Administrative Rules or opinions of a court of competent authority, for its own governance and for the organization and operation of Lane ESD. The Board accepts the definition of policy set forth by the National School Boards Association:

School Board policies are statements which set forth the purposes and prescribe in general terms the organization and program of a school system. They create a framework within which the superintendent and his/her staff can discharge their assigned duties with positive direction. They tell what is wanted.

Such policies may be adopted, amended or repealed at any Board meeting provided that the proposed adoption, amendment or repeal shall have been proposed at a previous Board meeting and, once proposed, shall have remained on the agenda of each succeeding meeting until approved or rejected and except that the Board may adopt, amend or repeal policies at any meeting of the Board in the event of an actual emergency, as determined at the sole discretion of the Board.

Additionally, when in the best interests of the district immediate adoption of a proposed policy is necessary, the Board may adopt such policy at the first

meeting in which it is presented.

Policies shall be adopted, amended or repealed by the affirmative vote of four or more Board members. Policies and amendments adopted by the Board will be attached to, and made a part of, the minutes of the meeting at which they are adopted and also will be included in the ESD's policy manual.

The Board shall communicate its position on matters of public policy and shall interact with the community, other governmental bodies and agencies and the media through the spokesperson designated by the Board.

Board representatives to the Policy Committee will provide an overview of the Policy Committee process in reviewing and recommending policy and administrative rule updates.

Board Chair

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D. 2025-26 Board of Directors Meeting Calendar

Superintendent Scurto and the Board of Directors will discuss the 2025-26 Board of Directors meeting schedule. This will be an initial discussion, with adoption of the meeting calendar on the June 2025 meeting agenda.

Proposed meeting dates are as follows:

- July 29, 2025 (organization)
- September 9, 2025 (September 2 is day following Labor Day)
- October 7, 2025
- November 4, 2025
- December 2, 2025
- January 6, 2026
- February 3, 2026
- March 3, 2026
- April 7, 2026
- May 5, 2026
- June 2, 2026

Superintendent Scurto

E. Board Self Evaluation

The Board of Directors of Lane ESD will discuss its self-evaluation process and next steps. The plan is to have a work session on this topic before the June 3rd Board Meeting.

Board of Directors

F. Election Season: Special Election May 20, 2025

The Board will discuss policy and guidance related to campaigns, political positions and endorsements.

Lane ESD's Board Policy KBE-Political Campaigns states:

Lane ESD may not use funds, facilities or equipment to influence a political campaign, nor to advocate "yes" or "no" votes on elections or political campaigns. The Board may vote to take positions on political issues and members may advocate for those positions in their capacity as Board members, provided that they do not use ESD funds, facilities or equipment in that advocacy.

In addition:

Oregon law prohibits the use of public funds, equipment, and supplies to advocate for or against a candidate or ballot measure. It also restricts what public employees, which include University of Oregon employees, may do in support of or opposition to a candidate or ballot measure.

Board Chair

G. OAESD Spring Conference

The OAESD Spring Conference is approaching, May 7-9, 2025 at Sunriver.

May 7:

Governance Council Meeting 4:30 - 6:00

Reception 6:00 - 8:00

May 8:

7:45 Breakfast

8:30 - 10:00 General Session

10:15 - 11:15 Breakout Session

11:30 - 12:45 Banquet Lunch

1:00 - 4:30 Breakout Sessions

4:45 - 6:15 President's Reception

(Dinner on Your Own)

May 9:

7:45 - 8:30 Breakfast

8:30 to 11:30 General Session

11:30 Adjourn

Board Chair, Superintendent

OAESD Spring Conference Agenda 2025

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10. Information from Administrative Staff

The directors of Human Resources and Title Programs, Special Education, Business Services, Technology and School Improvement have submitted written reports to the Board on matters of interest concerning his/her area of responsibility.

Administrative Staff

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11. Board Member Reports and Comments/Agenda Planning

Lane ESD Board, Liaisons, Advisors

A. Agenda Planning

Board members are invited to send agenda items to be considered for the next board meeting. Please call or email to the Board Chair or Superintendent.

Board Chair

B. Board Member Reports

Board members are asked to submit their reports in writing to be attached to Boardbook. Reports can be sent to the Executive Assistant in advance of the meeting.

As Board Members prepare their reports, please consider the following questions:

1. What programs did I visit over the last month? What committees did I participate in?
2. What is the connection to the LESD services and programs to the component districts or community?
3. What significance or meaning does the activity have to the broader community?
4. What are the next steps or follow-up activities planned?

Sherry Duerst-Higgins
Linda Hamilton

Leslie Harris

Nora Kent
Sydney Kissinger

Vanessa Truett

Rose Wilde

, Superintendents' Council Advisor
Mike Anderson, Liaison, Creswell School District
Danna Brownell, Liaison, McKenzie School District
Robin Zygaitis, Bethel School District

Board, Advisors, Liaisons

12. Announcements/Correspondence

Board Chair

A. Acknowledgements and Recognition

Superintendent Tony Scurto

B. Kudos

Thank you to those who took the time to acknowledge co-workers/staff with kudos. Employees and Board members can submit a "kudo" any time during the month. To submit a kudo visit:
www.lesd.k12.or.us/forms/kudos.html

Administrators

C. Announcements

Board Chair

1. **Lane ESD Board Member Activities and Opportunities**

May 7, 2025, Oregon LGBTQIA2S+ School Board Members Advisory Committee Meeting

May 7-9, 2025: OAESD Spring Conference

May 13, 2025, OSBA Executive Committee Meeting

May 14, 2025, National School Nurse Day

May 15, 2025, Equity Community Consortium Event - More details to follow

May 20, 2025, Oregon Rural School Board Members Caucus Leadership Assembly Meeting

June 2, 2025, OSBA Board of Directors Meeting

June 3, 2025, Oregon Rural School Board Member Caucus Executive Committee Meeting

June 4, 2025, Oregon LGBTQIA2S+ School Board Members Advisory Committee Meeting

June 7, 2025, Oregon School Board Members of Color Caucus Leadership Council Meeting

June 10, 2025, OSBA Executive Committee Meeting

June 14 and 19, 2025

ECC/CCAN is supporting two Juneteenth community events:

(1) Juneteenth Celebration on June 14th from 12pm-6pm

(2) Juneteenth Gathering: Celebrate Freedom on June 19th at the Farmers Market Pavilion in Downtown Eugene

June 22, 2025, Oregon School Board Members of Color Caucus Officers Meeting

July 2, 2025, Oregon LGBTQIA2S+ School Board Members Advisory Committee Meeting

July 8, 2025, OSBA Executive Committee Meeting

August 6, 2025, Oregon LGBTQIA2S+ School Board Members Advisory Committee Meeting

August 8-10, 2025, OSBA Summer Board Conference

August 12, 2025, OSBA Executive Committee Meeting

August 13, 2025, Oregon School Board Members of Color Caucus Leadership Council Meeting

August 21, 2025, Equity Community Consortium Event - More details to follow

September 2, 2025, Oregon Rural School Board Member Caucus Executive Committee Meeting

September 18, 2025, Equity Community Consortium Event - More details to follow

October 16, 2025, Equity Community Consortium Event - More details to follow

November 6-8, 2025, OSBA Fall Convention

February 6, 2026, OSBA Bonds, Ballots and Buildings Conference

*Lane ESD All Staff Welcome Back Date TBD

2. Component District Board Meeting Dates

Bethel: During the regular school year the school board meets on the 2nd and 4th Wednesdays of the month at 6pm for regular sessions. The Board will conduct only one meeting in November, December, March and May, when the board meets on the 2nd Wednesday only.

Blachly: The District Board typically meets on the second Wednesday of each month at 6:00 pm, location TBD.

Creswell: Regular Board of Director meetings are typically held the second Wednesday of each month at 6:00 PM.

Crow-Applegate-Lorane: The Board of Directors for Crow-Applegate-Lorane School District #66 holds a regular meeting at 7:00 pm on the third Thursday of each month. The meetings are held at Applegate Elementary School and at the Lorane Grange.

Eugene: The Eugene School Board usually meets in regular public sessions on the first and third Wednesdays of each month at 7 p.m. This schedule sometimes varies, and additional meetings and work sessions are scheduled as necessary.

Fern Ridge: Third Monday of the month, unless otherwise noted. Time: 6:30 p.m.

Junction City:

Lowell: Regular Board Meetings are scheduled for the 4th Monday of the month, with the Meeting beginning at 4:00 pm

Mapleton: The Mapleton School Board meets on the third Wednesday of each month. There is no meeting during the month of July. The School Board meeting is held in the high school at 6:00pm, unless otherwise noted.

Marcola: Regular board meetings are scheduled for the 2nd Monday of each month at 6 PM.

McKenzie: McKenzie School Board meetings are held on the third Wednesday of each month unless noted otherwise.

Oakridge

Pleasant Hill

Siuslaw: The board of directors meet the second Wednesday of each month with the exception of a regular meeting scheduled for August 21, 2024, and November 20, 2024 . The board normally meets in the district board room located at 2111 Oak Street in Florence, Oregon. The meetings are scheduled to begin at 6:00 p.m. with a work session and the regular meeting will begin at approximately 6:30p.m.

South Lane: The South Lane School Board usually meets in regular public sessions on the first Monday and third Monday of each month at 5:30 p.m. for a work session. Meetings normally are held at the South Lane School District Office, 455 Adams Ave in Cottage Grove.

Springfield: The Board of Directors generally meet on the second and fourth Mondays of each month. Regular business meetings begin at 7 p.m. on the second Monday and work sessions are generally held at 5:30 p.m. on the fourth Monday of the month. All meetings, unless otherwise noted, are held in the Board Room of the Springfield Public Schools Administration Building

13. Adjournment

- The next regular meeting is scheduled to be held Tuesday, June 3, 2025, at the Lane ESD Main Campus, 1200 Highway 99 N, Eugene.



2025-2026

Proposed Budget

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

Proposed Budget

July 1, 2025 - June 30, 2026

Prepared by Business Services
1200 Highway 99 N
Eugene, OR 97402
541-461-8289
www.lesd.k12.or.us



Lane ESD's summer migrant education program centers on culture, community, relationships, and learning.



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About Lane Education Service District

Oregon has more than 1,200 public K-12 schools organized into 197 School Districts and 19 Education Service Districts (ESDs). ESDs provide regional services to their component school districts, primarily in areas that the school districts alone would not be able to adequately and equitably provide. These services include: Programs for Children with Special Needs, Technology Support, School Improvement Services, and Administrative and Support Services.

Lane ESD provides services to sixteen component districts in Lane County. Our purpose is to **SERVE** our communities!

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

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

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

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

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

Component School Districts

Bethel
Blachly
Creswell
Crow-Applegate-Lorane
Eugene
Fern Ridge
Junction City
Lowell

Mapleton
Marcola
McKenzie
Oakridge
Pleasant Hill
Siuslaw
South Lane
Springfield



Board of Education

Lane ESD is governed by a citizen-elected Board of Directors and an appointed advisor representing employment training. Five of the Board positions represent geographical zones and two are designated at-large. All members serve four-year terms.



Sydney Kissinger
Zone 1 (Eugene-North)



Leslie Harris
Zone 2 (Eugene-South)
Vice-Chair



Vanessa Truett
Zone 3 (Springfield)



Nora Kent
Zone 4 (West/North County)



Sherry Duerst-Higgins
Zone 5 (East/South County)
Chair



Rose Wilde
Zone 6 (At Large)



Linda Hamilton
Zone 7 (At Large)

Component District
Board Liaisons:
Erin Zygaitis (Bethel)
Mike Anderson (Creswell)
Ericka Thessen (Eugene)
Danna Brownell (McKenzie)

Component District
Superintendent Advisor:
Rotating

Budget Committee

The budget committee consists of the elected Board members and eight members appointed by the Board from component school district boards or designees of component district Boards. The members appointed by the Board shall consist of five members selected by ESD zone and three members selected at large.

The budget committee reviews the proposed budget as presented by the superintendent, receives public comment, and concludes its work by recommending a budget and a tax levy.

Position	Appointed Member	Zone	Component District	Term Ends
1	Jenny Jonak	1	Eugene	June 30, 2026
2	Mike Anderson	2	Creswell	June 30, 2027
3	Tom DiLiberto	3	Eugene	June 30, 2027
4	Dwight Coon	4	Blachly	June 30, 2027
5	Jim Chapman	5	Lowell	June 30, 2025
6	Andrea Larson	At-Large	Fern Ridge	June 30, 2025
7	Robin Zygaitis	At-Large	Bethel	June 30, 2025
8	Mizu Burrus	At-Large	Mapleton	June 30, 2026

Budget Calendar

April 1, 2025	Board meeting: worksession for budget committee pre-meeting to provide overview of budget process, roles and responsibilities of budget committee, financial update, and budget outlook
April 7 - May 2, 2025	Publish notices of budget committee meeting - one internet notice and one newspaper notice
May 6, 2025	Budget committee meeting: receive superintendent's budget message; take public comment; review proposed budget; approve budget and tax levies
May 20, 2025	Second budget committee meeting (if necessary)
May 26 - 30, 2025	Publish notice of budget hearing and Form ED-1 (Financial Summary)
June 3, 2025	Board meeting: hold public hearing on approved budget; adopt resolution adopting budget, authorizing appropriations, and declaring taxes
June 4 - July 15, 2025	Submit board resolution and Form ED-50 (Notice of Property Tax and Certification of Intent to Impose a Tax on Property) to county assessors



Superintendent's Budget Message

Budget Committee Members, Colleagues, and Education Partners:

As we embark on the 2025-26 budget year, I would like to express my gratitude for the hard work and dedication of our educators, staff, and the continued support of our school communities.

This proposed budget was compiled with great attention to our sixteen regional school districts and the students and families we both serve. A large guiding role in preparation of this budget is attention to our Board-adopted [Strategic Plan](#) and application of our Equity Lens. As we continue to navigate uncertain times, our focus remains steadfast on being proactive and responsive; this proposed budget reflects our commitment to providing a high-quality education for all students while addressing the evolving needs of our districts, students, and families.

The development of this budget was a collaborative effort, starting with the creation and approval of a [Local Service Plan](#), which serves as a foundational document for Lane ESD and our component school districts. The Local Service Plan defines the range of services and programs offered and clarifies how resources, staffing, and funding will be allocated to support districts effectively. With this document, districts can make informed decisions about which services best align with their unique needs and goals, selecting from an available menu each year.

The Budget at a Glance

This proposed budget was constructed using State School Fund and Grant in Aid estimates from the Oregon Department of Education (ODE) and other state agencies, alongside estimates of purchased services from our component districts and other education partners. The 2025-26 proposed budget includes a total investment of \$79.4 million represented by five separate funds, with the largest being the Special Revenue Fund. The total budget for all funds is 8.8% higher than the 2024-25 budget, which reflects increases in local and state funding along with corresponding increases in salaries, benefits, and services.

The General Fund represents 46% of the 2025-26 proposed budget for all funds and accounts for all operating activities of the ESD except those activities required to be accounted for in another fund. General Fund revenues come from two main sources – local property taxes and the State School Fund. The General Fund budget totals \$36.0 million, representing an increase of \$4.7 million or 14.9% from 2024-25. The majority of the increase in General Fund resources is due to typical increases in property taxes and an increase in state school funding that addresses some long standing deficiencies with the state's calculation of the current service level.

Increases in General Fund requirements reflect a small increase in staffing that aligns with services requested by districts. Salaries and benefits comprise the majority of planned expenses at \$21.7 million

or 65% of all current requirements and in addition to the staffing changes, salary and benefit increases also include modest cost of living adjustments and a significant increase in PERS pension contributions.

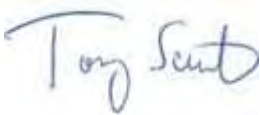
To ensure long-term sustainability, we have implemented measures to deliver the best educational program available within the constraints of well-managed resources. Recognizing the importance of a budget that delivers sustainable levels of services, this budget is structurally balanced, where recurring revenues equal or exceed recurring expenditures. The General Fund budget projects an operating surplus of \$90,000, resulting in an unassigned ending fund balance of \$2.5 million, or 7.7% of operating revenues, on June 30, 2026.

The Special Revenue Fund represents 52% of the 2025-26 proposed budget for all funds and accounts for local, state, and federal resources received by the ESD that support specialized and innovative programs or services at no cost to districts. Budgeted Special Revenue Fund resources and requirements total \$41.6 million, an increase of \$1.6 million or 4.0% from 2024-25. Changes in the Special Revenue Fund budget primarily reflect programmatic shifts that align with new grants.

Conclusion

Despite the myriad pressures and challenges we continue to experience, this budget once again demonstrates our resilience and shared commitment to equity, empowerment, and collaboration in education. Special thanks go to our Executive Director of Business Services, Olivia Meyers Buch and her talented team. I encourage you to review the detailed budget document and participate in the budget process; **your feedback is valuable as we work together to create a brighter future for our students.**

Sincerely,



Tony Scurto
Superintendent



How Services are Funded

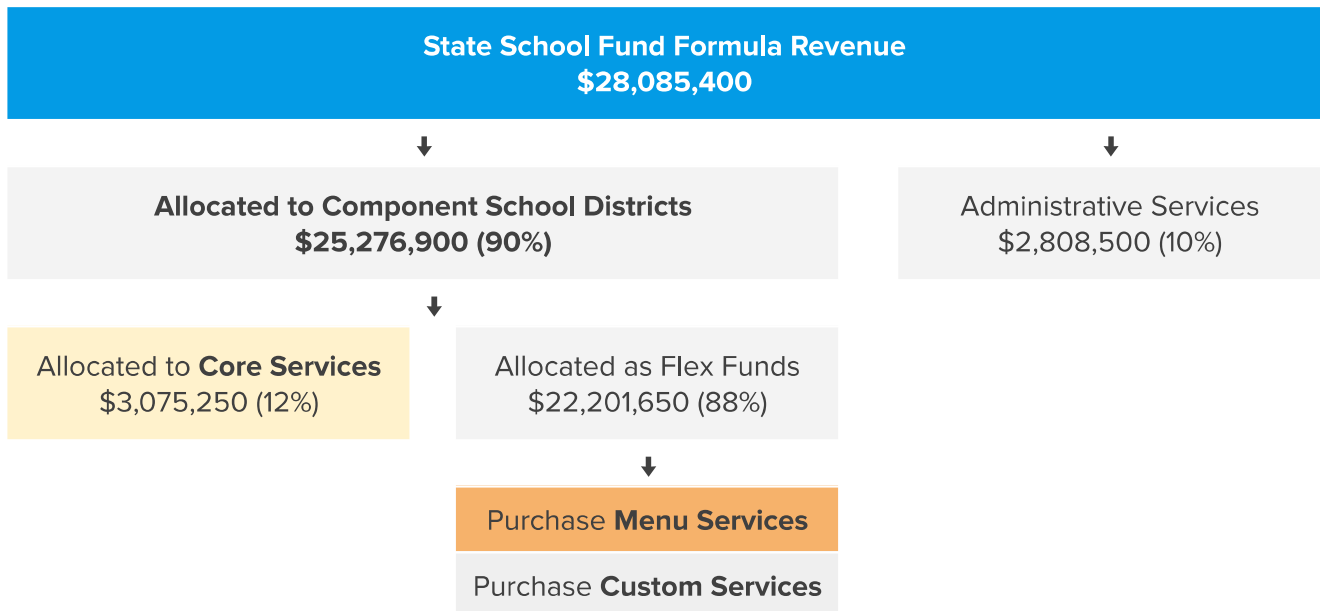
State School Fund resources are provided to ESDs to offer services for children with special needs, technology, school improvement, and administrative support to component school districts as described in the Local Service Plan. Pursuant to ORS 327.019, 90% of these resources are allocated to component school districts based on weighted student population (ADMw).

Of the amount allocated to districts, approximately 12% goes directly to services available to all districts (Core Services), while approximately 88% is allocated as flex funds, which can be used to purchase services through the local service plan menu (Menu Services or Custom Services).

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

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

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



**State School Fund Formula Revenue
Allocated to Component School Districts as Flex Funds**

District	ADMw	Allocation	%
Bethel	6,042.46	\$ 2,657,600	11.97%
Blachly	504.52	221,900	1.00%
Creswell	1,287.68	566,300	2.55%
Crow-Applegate-Lorane	427.08	187,800	0.85%
Eugene	18,302.67	8,049,950	36.26%
Fern Ridge	1,631.66	717,600	3.23%
Junction City	1,827.76	803,900	3.62%
Lowell	1,269.81	558,500	2.52%
Mapleton	282.73	124,400	0.56%
Marcola	1,140.80	501,700	2.26%
McKenzie	358.13	157,500	0.71%
Oakridge	673.62	296,300	1.33%
Pleasant Hill	1,099.94	483,800	2.18%
Siuslaw	1,395.65	613,800	2.76%
South Lane	3,311.32	1,456,400	6.56%
Springfield	10,923.10	4,804,200	21.64%
TOTAL	50,478.93	\$22,201,650	100.00%

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

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

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

Overview of Core Services

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

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

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

Overview of Menu Services

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

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

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

Overview of Grants and Contracts

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

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



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



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

Summary of Proposed Budget

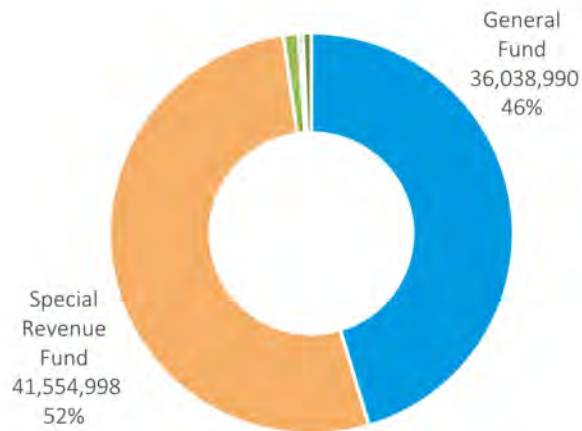


The Native Youth Wellness program provides professional development on Tribal History/Shared History and transformative social emotional learning, culture nights, student affinity groups, coaching on tribal education programs, equity, and culturally sustaining pedagogy.

All Funds

Resources and Requirements by Fund

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
100 General Fund	31,233,335	30,777,098		31,373,479		36,038,990		
200 Special Revenue Fund	38,083,524	34,169,272		39,965,000		41,554,998		
300 Debt Service Fund	913,285	949,061		916,855		954,703		
400 Capital Projects Fund	461,073	829,295		285,000		275,000		
600 Internal Service Fund	778,730	696,906		435,026		545,020		
Total Resources	71,469,947	67,421,631	-	72,975,360	-	79,368,711		
Requirements								
100 General Fund	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		
200 Special Revenue Fund	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		
300 Debt Service Fund	854,566	885,021	-	916,855	-	954,703		
400 Capital Projects Fund	216,778	829,295	-	285,000	-	275,000		
600 Internal Service Fund	360,656	562,436	-	435,026	-	545,020		
Total Requirements	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		
ENDING FUND BALANCE	-5,070,006	-3,479,433						



Funds - Chart of Account Definitions

In governmental accounting systems, the entity is viewed as a group of smaller entities called funds. A fund is a fiscal and accounting entity with self-balancing accounts set aside to carry on a specific activity or to meet certain objectives in accordance with a specific regulation. The requirements and resources of a fund must always balance. Every budget has at least one fund (commonly called the General Fund) which is used for everyday operation of the local government. The most common reason for establishing a special fund is to account for a revenue source whose use is limited to a particular kind of expenditure.

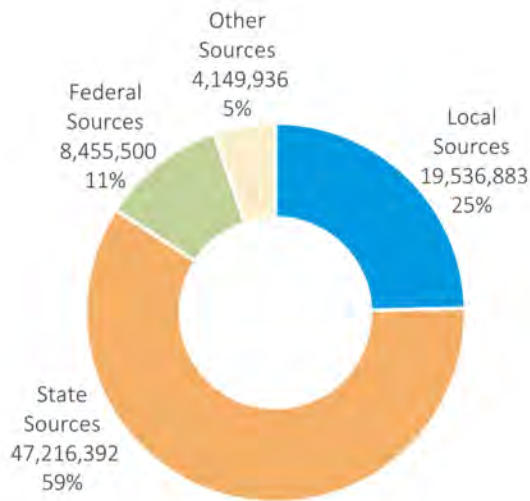
FUND TYPE		FUND COMPONENTS
100	General Fund	Accounts for all financial resources of the district except those required to be accounted for in another fund.
200	Special Revenue Fund	Accounts for the proceeds of specific revenue sources (other than expendable trusts or major capital projects) that are legally restricted to expenditure for specified purposes.
300	Debt Service Fund	Accounts for the accumulation of resources for, and the payment of, general long-term debt, principal and interest.
400	Capital Projects Fund	Accounts for financial resources used to acquire or construct major capital facilities. The most common source of revenue in this fund would be the sale of bonds.
600	Internal Service Fund	Accounts for the operation of district functions that provide goods or services to other district functions, other districts, or to other governmental units, on a cost-reimbursable basis.

All Funds

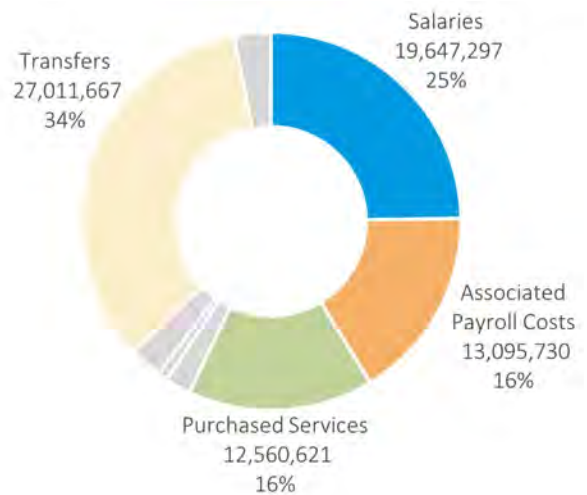
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	15,536,073	15,686,258		17,582,304		19,536,883		
2000 Intermediate Sources	-	-		-		10,000		
3000 State Sources	41,755,400	37,508,391		42,989,813		47,216,392		
4000 Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 Other Sources	6,505,433	5,924,179		3,487,243		4,149,936		
Total Resources	71,469,947	67,421,631		72,975,360		79,368,711		
Requirements								
100 Salaries	15,406,326	17,948,410	291.38	18,324,109	294.66	19,647,297		
200 Associated Payroll Costs	9,099,027	10,382,603		11,605,884		13,095,730		
300 Purchased Services	11,950,565	9,107,791		9,471,492		12,560,621		
400 Supplies and Materials	2,212,226	1,869,159		2,629,172		1,710,431		
500 Capital Outlay	930,199	2,083,723		618,940		659,181		
600 Other Objects	2,200,890	2,065,242		2,407,611		2,200,331		
700 Transfers	24,600,710	20,485,271		25,852,311		27,011,667		
800 Other Uses of Funds	-	-		2,065,842		2,483,453		
Total Requirements	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		
ENDING FUND BALANCE	5,070,006	3,479,431						

Resources



Requirements



Resources - Chart of Account Definitions

The Oregon Department of Education adopts a chart of accounts used by school districts to clarify revenues and expenditures. This chart of accounts is meant to define account classifications in a meaningful way to the users of financial information while conforming with Generally Accepted Accounting Principles (GAAP), a minimum standard and guideline for financial accounting and reporting. Revenues collected by school districts are first classified by fund, then by source.

SOURCE		SOURCE DESCRIPTION
1000	Revenue from Local Sources	Revenues from Local Sources include taxes levied by the district, revenue from the appropriations of other local governments, tuition, transportation fees, earnings on investments, food service revenues, extracurricular activity revenue, and other similar sources.
2000	Revenue from Intermediate Sources	Revenue received as grants by the district and revenue received from city and county income taxes are categorized here.
3000	Revenue from State Sources	State School Fund revenues are recorded here as well as all other restricted and unrestricted grants-in-aid received from state funds.
4000	Revenue from Federal Sources	All restricted and unrestricted revenue received from the federal government directly or through the state or through immediate agencies.
5000	Other Sources	Other sources of revenue include beginning fund balances, sale or compensation for the loss of fixed assets, long-term debt financing, and interfund transfers.

Objects - Chart of Account Definitions

Within each function, the estimates of line item expenditures are detailed by object. An object is the service or commodity bought.

OBJECT TYPE		OBJECT DESCRIPTION
100	Salaries	Amounts paid to employees of the district who are considered to be in positions of a permanent nature or hired temporarily, including personnel substituting for those in permanent positions. This includes gross salary for personal services rendered while ON THE PAYROLL of the district.
200	Associated Payroll Costs	Amounts paid by the district on behalf of employees; these amounts are not included in the gross salary, but are over and above. Such payments are fringe benefit payments, and, while not paid directly to employees, nevertheless are part of the cost of salaries and benefits.
300	Purchased Services	Services which, by their nature, can be performed only by persons or firms with specialized skills and knowledge. While a product may or may not result from the transaction, the primary reason for the purchase is the service provided. Included are the services of architects, engineers, auditors, dentists, medical doctors, lawyers, consultants, teachers, accountants, etc.
400	Supplies and Materials	Amounts paid for material items of an expendable nature that are consumed, worn out, or deteriorated by use; or items that lose their identity through fabrication or incorporation into different or more complex units or substances.
500	Capital Outlay	Expenditures for the acquisition of fixed assets or additions to fixed assets. These are expenditures for land or existing buildings; improvements of grounds; construction of buildings; additions to buildings; remodeling of buildings; initial equipment; additional equipment; and replacement of equipment.
600	Other Objects	Amounts paid for goods and services not otherwise classified above. This includes expenditures for the retirement of debt, the payment of interest on debt, payments to a housing authority, and the payment of dues and fees.
700	Transfers	This object category does not represent a purchase; rather it is used as an accounting entity to show that funds have been handled without having goods and services rendered in return.
800	Other Uses of Funds	Amounts set aside for operating contingencies for expenditures which cannot be foreseen and planned in the budget because of the occurrence of some unusual or extraordinary event, or reserved for next year.

All Funds

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1110 Ad Valorem Taxes Levied by District	8,420,733	8,616,900		9,040,376		9,361,045		
1190 Penalties and Interest on Taxes	20,563	20,733		14,659		20,000		
1500 Earnings on Investments	237,707	365,476		218,000		318,000		
1910 Rentals	-	4,590		-		5,000		
1920 Contributions, Donations, and General Fundraising from Private Sources	205,427	81,228		481,000		625,200		
1940 Services Provided to Other Local Education Agencies	4,046,964	4,140,578		5,699,514		6,816,349		
1960 Recovery of Prior Years' Expenditure	-	11,625		-		137,783		
1970 Services Provided Other Funds	1,117,099	1,143,847		1,107,755		1,149,006		
1980 Fees Charged to Grants	940,066	812,985		600,000		700,000		
1990 Miscellaneous	547,514	488,296		421,000		404,500		
Total Revenue from Local Sources	15,536,073	15,686,258		17,582,304		19,536,883		
2000 - Revenue from Intermediate Sources								
2199 Other Intermediate Sources	-	-		-		10,000		
Total Revenue from Intermediate Sources	-	-		-		10,000		
3000 - Revenue from State Sources								
3101 State School Fund - General Support	15,420,256	16,091,917		16,290,313		18,704,394		
3104 State Managed County Timber	96,609	61,506		70,000		25,000		
3299 Other Unrestricted Grants-in-aid	26,238,534	21,354,968		26,629,500		28,486,998		
Total Revenue from State Sources	41,755,400	37,508,391		42,989,813		47,216,392		
4000 - Revenue from Federal Sources								
4300 Restricted Revenue Direct from the Federal Government	4,160	249,201		110,000		-		
4500 Restricted Revenue From the Federal Government Through the State	7,583,177	7,902,957		8,701,000		8,360,500		
4700 Grants-In-Aid From the Federal Government Through Other Intermediate Agencies	82,042	150,644		100,000		95,000		
4900 Revenue for/on Behalf of the District	3,663	-		5,000		-		
Total Revenue from Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 - Revenue from Other Sources								
5100 Long Term Debt Financing Sources	-	342,174		-		-		
5200 Interfund Transfers	459,000	448,198		451,500		452,500		
5300 Sale of/or Compensation for Loss of Fixed Assets	4,092	-		-		-		
5400 Beginning Fund Balance	6,042,341	5,133,807		3,035,743		3,697,436		
Total Revenue from Other Sources	6,505,433	5,924,179		3,487,243		4,149,936		
TOTAL RESOURCES	71,469,947	67,421,631		73,475,360		79,368,711		

All Funds

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
100 - Salaries								
111 Licensed Salaries	6,007,732	6,540,440	83.81	6,557,695	94.60	7,787,023		
112 Classified Salaries	6,096,238	7,558,932	182.26	7,950,953	179.06	8,170,577		
113 Administrators	2,010,672	2,633,417	18.00	2,651,192	16.00	2,526,662		
114 Managerial - Classified	416,147	549,883	7.01	547,302	5.00	429,387		
121 Substitutes - Licensed	4,875	8,589	-	-	-	-		
122 Substitutes - Classified	603	48,285	-	-	-	-		
123 Temporary - Licensed	623,896	482,531	0.30	289,633	-	230,000		
124 Temporary - Classified	231,984	92,859	-	150,000	-	135,000		
130 Additional Salary	14,180	33,473	-	177,334	-	368,648		
Total Salaries	15,406,326	17,948,410	291.38	18,324,109	294.66	19,647,297		
200 - Associated Payroll Costs								
210 Public Employees Retirement System	4,056,412	4,965,800		5,567,112		7,126,320		
220 Social Security Administration	1,159,009	1,339,036		1,602,951		1,501,751		
230 Other Required Payroll Costs	274,043	201,935		239,376		318,196		
240 Contractual Employee Benefits	3,609,563	3,875,832		4,196,445		4,149,463		
Total Associated Payroll Costs	9,099,027	10,382,603		11,605,884		13,095,730		
300 - Purchased Services								
310 Instructional, Professional and Technical Services	6,735,588	5,680,599		6,293,788		9,325,703		
320 Property Services	1,242,086	608,937		578,700		692,100		
330 Student Transportation Services	34,948	88,103		-		-		
340 Travel	484,306	293,274		235,800		254,350		
350 Communication	661,600	601,228		475,550		514,850		
374 Other Tuition	380,804	193,599		425,000		292,721		
380 Non-Instructional Professional and Technical Services	2,408,187	1,638,407		1,460,654		1,475,898		
390 Other General Professional and Technological Services	3,047	3,645		2,000		5,000		
Total Purchased Services	11,950,565	9,107,791		9,471,492		12,560,621		
400 - Supplies and Materials								
410 Consumable Supplies and Materials	751,872	771,267		1,310,467		674,901		
420 Textbooks	85,211	29,294		44,100		10,000		
430 Library Books	11,299	-		-		-		
440 Periodicals	-	412		-		500		
450 Food	3,663	-		5,000		-		
460 Non-Consumable Items	425,024	295,165		347,627		146,200		
470 Computer Software	597,930	521,363		553,075		539,331		
480 Computer Hardware	337,227	251,658		368,903		339,500		
Total Supplies and Materials	2,212,226	1,869,159		2,629,172		1,710,431		
500 - Capital Outlay								
540 Depreciable Equipment	231,868	431,490		413,940		200,020		
550 Depreciable Technology	-	654,615		205,000		280,000		
590 Other Capital Outlay	698,330	997,618		-		179,161		
Total Capital Outlay	930,199	2,083,723		618,940		659,181		
600 - Other Objects								
610 Redemption of Principal	655,682	732,190		848,164		943,068		
621 Regular Interest	261,951	226,880		204,747		158,452		

All Funds

Requirements by Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
640 Dues and Fees	95,923	123,054		96,330		141,255		
650 Insurance and Judgements	247,269	170,132		192,500		218,000		
690 Grant Indirect Charges	940,066	812,985		1,065,870		739,556		
Total Other Objects	2,200,890	2,065,242	-	2,407,611	-	2,200,331		
700 - Transfers								
710 Fund Modifications	459,000	448,198		451,500		452,500		
720 Transits	24,141,710	20,037,073		25,400,811		26,559,167		
Total Transfers	24,600,710	20,485,271		25,852,311		27,011,667		
800 - Other Uses of Funds								
810 Planned Reserve	-	-		1,265,842		650,000		
820 Reserved for Next Year	-	-		800,000		1,833,453		
Total Other Uses of Funds	-	-		2,065,842		2,483,453		
TOTAL REQUIREMENTS	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		

All Funds

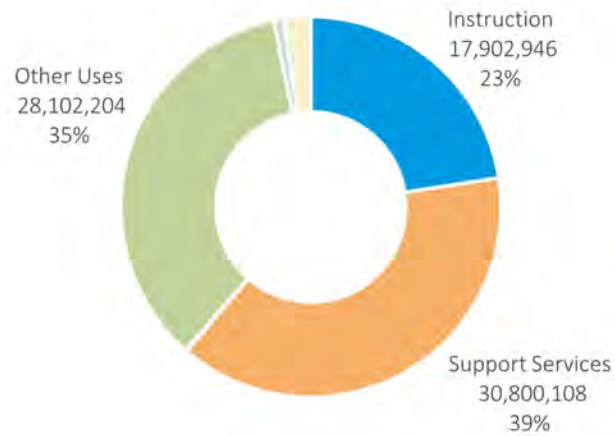
Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Instruction								
1111 Elementary, K-5 or K-6	-	37,211	-	-	-	-	-	-
1121 Middle/Junior High School Programs	-	2,161	-	-	-	-	-	-
1140 Pre-Kindergarten Programs	767	-	-	-	-	-	-	-
1220 Restrictive Programs for Students with Disabilities	12,201,038	13,388,706	162.47	14,353,022	159.39	15,237,408		
1250 Less Restrictive Programs For Students with Disabilities	1,385,315	1,582,246	8.00	1,265,303	9.00	1,427,200		
1280 Alternative Education	-	6,261	2.00	162,500	2.00	303,990		
1293 Migrant Education	721,057	674,918	0.50	148,750	0.80	392,228		
1294 Youth Corrections Education	501,195	419,884	3.20	569,352	3.00	482,696		
1299 Other Programs	39,633	27,312	0.30	35,874	0.30	39,424		
1400 Summer School Programs	2,090	33,002	0.05	10,716	0.05	20,000		
Total Instruction	14,851,095	16,171,700	176.52	16,545,516	174.54	17,902,946		
2000 - Support Services								
2110 Attendance and Social Work Services	892,939	818,988	7.55	872,791	4.61	532,772		
2120 Guidance Services	995,628	1,107,331	1.70	411,664	2.00	409,229		
2130 Health Services	59,376	78,655	0.63	143,388	2.80	450,432		
2140 Psychological Services	264,153	256,837	0.63	242,425	2.80	486,093		
2150 Speech Pathology and Audiology Services	1,010,253	1,191,852	8.20	1,397,368	15.80	2,326,529		
2160 Other Student Treatment Services	-	-	-	-	-	550,000		
2190 Service Direction, Student Support Services	1,804,071	1,794,507	10.31	2,080,336	9.05	1,895,318		
2210 Improvement of Instruction Services	6,111,254	5,455,652	23.73	6,770,259	21.53	8,152,331		
2220 Educational Media Services	88,647	87,208	1.00	109,620	1.00	124,135		
2240 Instructional Staff Development	3,820,807	3,522,642	9.43	4,301,214	8.75	3,617,434		
2310 Board of Education Services	363,643	391,437	-	437,125	-	371,825		
2320 Executive Administration Services	505,157	471,928	2.05	481,566	2.50	684,136		
2520 Fiscal Services	547,669	591,614	4.00	588,960	4.00	680,049		
2540 Operation and Maintenance of Plant Services	2,577,921	2,497,617	3.70	1,491,951	3.50	1,412,564		
2550 Student Transportation Services	5,729	-	-	-	-	-		
2570 Internal Services	115,278	63,615	1.00	82,447	0.80	79,200		
2620 Planning, Research, Development,	41,658	125	-	-	-	-		
2630 Information Services	188	1,002	-	-	-	-		
2640 Staff Services	855,885	824,164	3.50	784,023	4.09	891,824		
2660 Technology Services	1,873,184	2,693,300	9.00	2,494,363	8.50	2,774,016		
2680 Interpretation and Translation Services	3,987,618	4,395,194	28.44	4,665,000	28.40	5,340,000		
2690 Other Support Services - Central	34,142	28,130	-	20,251	-	13,100		
2700 Supplemental Retirement Program	11,850	5,380	-	9,030	-	9,120		
Total Support Services	25,967,050	26,277,178	114.86	27,383,780	120.13	30,800,108		
3000 - Enterprise and Community Services								
3100 Food Services	63,455	59,963	-	75,000	-	80,000		
Total Enterprise and Community Services	63,455	59,963	-	75,000	-	80,000		
5000 - Other Uses								
5100 Debt Service	917,632	948,088	-	1,052,911	-	1,090,537		
5200 Transfers of Funds	459,000	448,198	-	451,500	-	452,500		
5300 Apportionment of Funds by ESD	24,141,710	20,037,073	-	25,400,811	-	26,559,167		
Total Other Uses	25,518,342	21,433,359	-	26,905,222	-	28,102,204		

All Funds

Requirements by Function (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
6000 - Contingencies								
6000 Operating Contingency	-	-		1,265,842		650,000		
Total Contingencies	-	-		1,265,842		650,000		
7000 - Unappropriated Ending Fund Balance								
7000 Unappropriated Ending Fund Balance	-	-		800,000		1,833,453		
Total Unappropriated Ending Fund Balance	-	-		800,000		1,833,453		
TOTAL REQUIREMENTS	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		



Functions - Chart of Account Definitions

Budget requirements are prepared by program. Programs are groups of activities to accomplish a major service or function. Schools use programs in budgeting – called “functions”. The function describes the activity for which a service or material object is acquired.

FUNCTION TYPE		FUNCTION DESCRIPTION
1000	Instruction	Activities dealing directly with the teaching of students, or the interaction between teacher and students. Teaching may be provided for students in a school classroom, in another location such as a home or hospital, or in other learning situations such as those involving co-curricular activities.
2000	Support Services	Support services are those services which provide administrative, technical, personal (such as guidance and health), and logistical support to facilitate and enhance instruction.
3000	Enterprise and Community Services	Activities concerned with operations that are financed and operated in a manner similar to private business enterprises where the stated intent is that the costs of providing goods and services to the students or general public are financed or recovered primarily through user charges and community programs.
5000	Other Uses	Activities included in this category are servicing the debt of a district, conduit-type transfers from one fund to another fund and apportionment of funds by Education Service District (ESD).
6000	Contingency	Expenditures which cannot be foreseen and planned in the budget process because of an occurrence of an unusual or extraordinary event.
7000	Unappropriated Ending Fund Balance	An estimate of funds needed to maintain operations of the school district from July 1 of the ensuing fiscal year and the time when sufficient new revenues become available to meet cash flow needs of the fund. No expenditure shall be made from the unappropriated ending fund balance in the year in which it is budgeted.

General Fund

The General Fund is the main operating fund of the ESD and accounts for all financial resources of the district except those required to be accounted for in another fund.



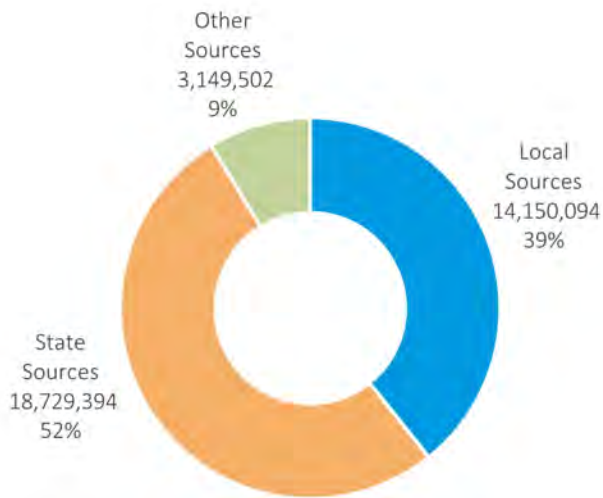
Friends and Fun Camp provided Life Skills students with opportunities to experience swimming, music, art, science, and other social activities specifically tailored to meet their unique needs.

General Fund

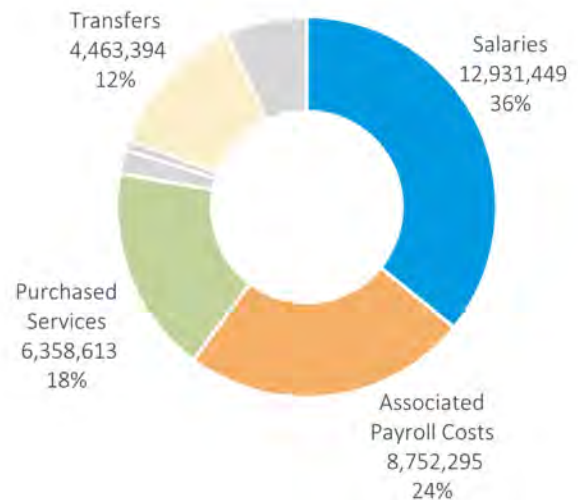
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	11,319,810	11,334,861		12,394,549		14,150,094		
2000 Intermediate Sources	-	-		-		10,000		
3000 State Sources	15,516,866	16,153,423		16,360,313		18,729,394		
5000 Other Sources	4,396,659	3,288,814		2,618,617		3,149,502		
Total Resources	31,233,335	30,777,098		31,373,479		36,038,990		
Requirements								
100 Salaries	9,141,836	10,973,743	205.95	11,436,471	215.29	12,931,449		
200 Associated Payroll Costs	5,738,735	6,470,402		7,495,703		8,752,295		
300 Purchased Services	6,815,071	5,713,478		5,695,892		6,358,613		
400 Supplies and Materials	763,976	599,614		662,884		724,853		
600 Other Objects	312,523	263,685		269,700		324,933		
700 Transfers	5,214,555	4,046,197		3,746,987		4,463,394		
800 Other Uses of Funds	-	-		2,065,842		2,483,453		
Total Requirements	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		
ENDING FUND BALANCE	3,246,640	2,709,979						

Resources



Requirements



General Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1110 Ad Valorem Taxes Levied by District	8,420,733	8,616,900		9,040,376		9,361,045		
1190 Penalties and Interest on Taxes	20,563	20,733		14,659		20,000		
1500 Earnings on Investments	222,443	340,150		200,000		300,000		
1910 Rentals	-	4,590		-		5,000		
1920 Contributions, Donations, and General Fundraising from Private Sources	55	218		-		200		
1940 Services Provided to Other Local Education Agencies	1,376,808	1,256,511		2,209,514		3,441,349		
1960 Recovery of Prior Years' Expenditure	-	-		-		5,000		
1980 Fees Charged to Grants	940,066	812,985		600,000		700,000		
1990 Miscellaneous	339,143	282,773		330,000		317,500		
Total Revenue from Local Sources	11,319,810	11,334,861		12,394,549		14,150,094		
2000 - Revenue from Intermediate Sources								
2199 Other Intermediate Sources	-	-		-		10,000		
Total Revenue from Intermediate Sources	-	-		-		10,000		
3000 - Revenue from State Sources								
3101 State School Fund - General Support	15,420,256	16,091,917		16,290,313		18,704,394		
3104 State Managed County Timber	96,609	61,506		70,000		25,000		
3199 Other Unrestricted Grants-in-aid	-	-		-		-		
Total Revenue from State Sources	15,516,866	16,153,423		16,360,313		18,729,394		
5000 - Revenue from Other Sources								
5100 Long Term Debt Financing Sources	-	42,174		-		-		
5400 Beginning Fund Balance	4,396,659	3,246,640		2,618,617		3,149,502		
Total Revenue from Other Sources	4,396,659	3,288,814		2,618,617		3,149,502		
TOTAL RESOURCES	31,233,335	30,777,098		31,373,479		36,038,990		

General Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
100 - Salaries								
111 Licensed Salaries	3,321,324	3,759,536	51.58	3,704,207	64.00	4,934,272		
112 Classified Salaries	3,885,363	4,817,099	135.04	5,185,211	134.99	5,476,629		
113 Administrators	1,502,582	1,785,700	12.85	1,933,580	11.40	1,819,319		
114 Managerial - Classified	351,127	486,122	6.48	508,123	4.90	421,316		
121 Substitutes - Licensed	4,875	8,589	-	-	-	-		
122 Substitutes - Classified	603	48,285	-	-	-	-		
123 Temporary - Licensed	13,763	24,667	-	-	-	30,000		
124 Temporary - Classified	53,219	21,721	-	-	-	35,000		
130 Additional Salary	8,980	22,023	-	105,350	-	214,913		
Total Salaries	9,141,836	10,973,743	205.95	11,436,471	215.29	12,931,449		
200 - Associated Payroll Costs								
210 Public Employees Retirement System	2,393,719	2,953,487		3,461,964		4,668,744		
220 Social Security Administration	684,907	814,391		998,495		987,989		
230 Other Required Payroll Costs	161,253	119,934		157,692		216,570		
240 Contractual Employee Benefits	2,498,856	2,582,590		2,877,552		2,878,992		
Total Associated Payroll Costs	5,738,735	6,470,402		7,495,703		8,752,295		
300 - Purchased Services								
310 Instructional, Professional and Technical Services	4,497,034	3,984,236		4,020,788		4,584,060		
320 Property Services	1,036,274	524,734		531,400		611,100		
330 Student Transportation Services	-	67		-		-		
340 Travel	144,828	64,981		44,400		78,000		
350 Communication	385,580	472,858		420,750		466,705		
380 Non-Instructional Professional and Technical Services	748,307	662,958		676,554		613,748		
390 Other General Professional and Technological Services	3,047	3,645		2,000		5,000		
Total Purchased Services	6,815,071	5,713,478		5,695,892		6,358,613		
400 - Supplies and Materials								
410 Consumable Supplies and Materials	185,279	192,784		203,025		226,332		
420 Textbooks	22,181	17,442		21,000		-		
430 Library Books	80	-		-		-		
440 Periodicals	-	387		-		500		
460 Non-Consumable Items	256,494	126,648		121,784		87,200		
470 Computer Software	242,929	231,192		274,075		401,321		
480 Computer Hardware	57,013	31,161		43,000		9,500		
Total Supplies and Materials	763,976	599,614		662,884		724,853		
600 - Other Objects								
610 Redemption of Principal	-	10,113		-		10,684		
621 Regular Interest	-	870		-		299		
640 Dues and Fees	65,254	82,570		77,200		95,950		
650 Insurance and Judgements	247,269	170,132		192,500		218,000		
Total Other Objects	312,523	263,685		269,700		324,933		

General Fund

Requirements by Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
700 - Transfers								
710 Fund Modifications	459,000	448,198		449,000		452,500		
720 Transits	4,755,555	3,597,999		3,297,987		4,010,894		
Total Transfers	5,214,555	4,046,197		3,746,987		4,463,394		
800 - Other Uses of Funds								
810 Planned Reserve	-	-		1,265,842		650,000		
820 Reserved for Next Year	-	-		800,000		1,833,453		
Total Other Uses of Funds	-	-		2,065,842		2,483,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Instruction								
1220 Restrictive Programs for Students with Disabilities	11,714,304	12,892,130	159.07	13,256,808	153.29	13,820,334		
1280 Alternative Education	-	-	-	-	2.00	303,990		
1299 Other Programs	39,633	27,312	0.30	35,874	0.30	39,424		
Total Instruction	11,753,937	12,919,442	159.37	13,292,681	155.59	14,163,749		
2000 - Support Services								
2110 Attendance and Social Work Services	11,827	4,208	0.05	5,541	-	-		
2120 Guidance Services	98,355	77,951	-	86,604	0.50	166,661		
2130 Health Services	38,285	24,425	0.63	88,388	2.80	397,432		
2140 Psychological Services	264,153	256,837	0.63	242,425	2.80	486,093		
2150 Speech Pathology and Audiology Services	1,002,979	1,191,852	8.20	1,394,368	15.30	2,246,237		
2160 Other Student Treatment Services	-	-	-	-	-	550,000		
2190 Service Direction, Student Support Services	1,675,114	1,615,888	9.73	1,901,088	7.75	1,548,811		
2210 Improvement of Instruction Services	761,484	869,617	4.10	907,167	6.16	1,281,878		
2220 Educational Media Services	88,647	87,208	1.00	109,620	1.00	124,135		
2240 Instructional Staff Development	239,202	113,348	-	572,843	-	78,000		
2310 Board of Education Services	363,643	391,437	-	437,125	-	371,825		
2320 Executive Administration Services	505,157	471,928	2.05	481,566	2.50	684,136		
2520 Fiscal Services	547,669	591,614	4.00	588,960	4.00	680,049		
2540 Operation and Maintenance of Plant Services	1,539,775	1,004,847	3.70	1,068,011	3.50	1,023,383		
2570 Internal Services	71,123	63,615	1.00	82,447	0.80	79,200		
2630 Information Services	188	1,002	-	-	-	-		
2640 Staff Services	684,499	806,239	3.50	709,709	4.09	844,319		
2660 Technology Services	1,417,506	1,709,135	8.00	1,857,827	8.50	2,124,016		
2680 Interpretation and Translation Services	1,662,604	1,798,500	-	1,705,000	-	2,220,000		
2690 Other Support Services - Central	34,142	16,451	-	20,251	-	13,100		
2700 Supplemental Retirement Program	11,850	5,380	-	9,030	-	9,120		
Total Support Services	11,018,203	11,101,481	46.58	12,267,969	59.70	14,928,394		
5000 - Other Uses								
5200 Transfers of Funds	459,000	448,198	-	449,000	-	452,500		
5300 Apportionment of Funds by ESD	4,755,555	3,597,999	-	3,297,987	-	4,010,894		
Total Other Uses	5,214,555	4,046,197		3,746,987		4,463,394		
6000 - Contingencies								
6000 Operating Contingency	-	-	-	1,265,842	-	650,000		
Total Contingencies				1,265,842		650,000		
7000 - Unappropriated Ending Fund Balance								
7000 Unappropriated Ending Fund Balance	-	-	-	800,000	-	1,833,453		
Total Unappropriated Ending Fund Balance				800,000		1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1220 - Restrictive Programs for Students with Disabilities								
111 Licensed Salaries	2,666,008	2,899,139	40.13	2,861,425	37.60	2,727,045		
112 Classified Salaries	2,832,375	3,789,144	118.94	4,051,233	115.69	4,116,469		
121 Substitutes - Licensed	4,875	8,589	-	-	-	-		
122 Substitutes - Classified	603	48,285	-	-	-	-		
123 Temporary - Licensed	-	23,767	-	-	-	10,000		
124 Temporary - Classified	7,352	5,829	-	-	-	35,000		
130 Additional Salary	3,900	4,713	-	77,990	-	153,038		
210 Public Employees Retirement System	1,414,099	1,787,564	-	2,097,916	-	2,528,428		
220 Social Security Administration	414,652	502,301	-	619,768	-	538,679		
230 Other Required Payroll Costs	78,637	54,360	-	83,572	-	84,188		
240 Contractual Employee Benefits	1,793,492	1,788,972	-	1,975,153	-	1,820,694		
310 Instructional, Professional and Technical Services	2,025,534	1,549,667	-	1,078,700	-	1,372,595		
320 Property Services	127,761	88,849	-	85,700	-	152,800		
330 Student Transportation Services	-	67	-	-	-	-		
340 Travel	9,097	4,342	-	3,900	-	8,350		
350 Communication	32,702	85,236	-	73,750	-	43,200		
380 Non-Instructional Professional and Technical Services	17,619	2,249	-	1,000	-	12,100		
410 Consumable Supplies and Materials	65,600	90,485	-	96,100	-	88,499		
420 Textbooks	17,914	17,377	-	21,000	-	-		
430 Library Books	80	-	-	-	-	-		
460 Non-Consumable Items	97,416	52,492	-	47,000	-	45,000		
470 Computer Software	59,556	66,726	-	61,500	-	79,250		
480 Computer Hardware	42,161	21,215	-	20,000	-	5,000		
640 Dues and Fees	2,873	762	-	1,100	-	-		
Total Restrictive Programs for Students with Disabilities	11,714,304	12,892,130	159.07	13,256,808	153.29	13,820,334		
1280 - Alternative Education								
111 Licensed Salaries	-	-	-	-	1.00	74,308		
112 Classified Salaries	-	-	-	-	1.00	41,516		
210 Public Employees Retirement System	-	-	-	-	-	41,442		
220 Social Security Administration	-	-	-	-	-	8,861		
230 Other Required Payroll Costs	-	-	-	-	-	1,373		
240 Contractual Employee Benefits	-	-	-	-	-	16,913		
310 Instructional, Professional and Technical Services	-	-	-	-	-	83,527		
320 Property Services	-	-	-	-	-	4,000		
340 Travel	-	-	-	-	-	1,000		
350 Communication	-	-	-	-	-	4,050		
410 Consumable Supplies and Materials	-	-	-	-	-	23,501		
460 Non-Consumable Items	-	-	-	-	-	1,000		
470 Computer Software	-	-	-	-	-	2,500		
Total Alternative Education	-	-	-	-	2.00	303,990		
1299 - Other Programs								
112 Classified Salaries	18,623	13,945	0.30	20,099	0.30	20,804		
124 Temporary - Classified	3,331	587	-	-	-	-		
210 Public Employees Retirement System	6,853	4,349	-	5,973	-	7,444		
220 Social Security Administration	1,644	1,095	-	1,538	-	1,592		
230 Other Required Payroll Costs	219	172	-	239	-	247		
240 Contractual Employee Benefits	2,736	1,859	-	2,550	-	2,538		
320 Property Services	129	178	-	200	-	200		

General Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
350 Communication	2,488	2,410		2,500		3,100		
380 Non-Instructional Professional and Technical Services	765	-		-		-		
410 Consumable Supplies and Materials	269	141		200		500		
470 Computer Software	2,576	2,575		2,575		3,000		
Total Other Programs	39,633	27,312	0.30	35,874	0.30	39,424		
Total Instruction	11,753,937	12,919,442	159.37	13,292,681	155.59	14,163,749		
2110 - Attendance and Social Work Services								
112 Classified Salaries	5,924	2,254	0.05	3,350	-	-		
124 Temporary - Classified	1,221	65	-	-	-	-		
210 Public Employees Retirement System	2,087	691	-	996	-	-		
220 Social Security Administration	541	175	-	256	-	-		
230 Other Required Payroll Costs	75	28	-	40	-	-		
240 Contractual Employee Benefits	391	304	-	425	-	-		
320 Property Services	13	25	-	-	-	-		
340 Travel	91	-	-	-	-	-		
350 Communication	924	610	-	375	-	-		
380 Non-Instructional Professional and Technical Services	450	-	-	-	-	-		
470 Computer Software	110	56	-	100	-	-		
Total Attendance and Social Work Services	11,827	4,208	0.05	5,541	-	-		
2120 - Guidance Services								
111 Licensed Salaries	-	-	-	-	0.50	47,041		
112 Classified Salaries	9,709	10,317	-	-	-	16,831		
210 Public Employees Retirement System	2,719	3,031	-	-	-	3,599		
220 Social Security Administration	737	757	-	-	-	552		
230 Other Required Payroll Costs	159	120	-	-	-	9,190		
240 Contractual Employee Benefits	2,598	2,898	-	-	-	500		
380 Non-Instructional Professional and Technical Services	82,433	60,827	-	86,604	-	86,948		
410 Consumable Supplies and Materials	-	-	-	-	-	500		
470 Computer Software	-	-	-	-	-	500		
640 Dues and Fees	-	-	-	-	-	1,000		
Total Guidance Services	98,355	77,951	-	86,604	0.50	166,661		
2130 - Health Services								
111 Licensed Salaries	10,064	16,506	0.63	48,628	2.80	230,140		
130 Additional Salary	-	1,511	-	-	-	6,000		
210 Public Employees Retirement System	2,328	880	-	15,833	-	84,491		
220 Social Security Administration	749	1,340	-	5,104	-	18,065		
230 Other Required Payroll Costs	80	208	-	572	-	2,790		
240 Contractual Employee Benefits	1,192	3,393	-	18,251	-	26,890		
310 Instructional, Professional and Technical Services	21,585	279	-	-	-	19,507		
340 Travel	-	-	-	-	-	700		
350 Communication	-	120	-	-	-	3,700		
410 Consumable Supplies and Materials	-	-	-	-	-	900		
470 Computer Software	-	50	-	-	-	750		
480 Computer Hardware	2,288	140	-	-	-	-		
640 Dues and Fees	-	-	-	-	-	3,500		
Total Health Services	38,285	24,425	0.63	88,388	2.80	397,432		
2140 - Psychological Services								
111 Licensed Salaries	69,433	71,687	0.63	55,285	2.80	251,005		

General Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
130 Additional Salary	-	-		564		-		
210 Public Employees Retirement System	20,506	21,421		17,515		91,654		
220 Social Security Administration	5,046	5,484		4,272		19,202		
230 Other Required Payroll Costs	692	840		657		2,944		
240 Contractual Employee Benefits	16,139	9,390		9,631		54,238		
310 Instructional, Professional and Technical Services	146,761	144,000		150,000		46,351		
320 Property Services	356	533		500		-		
350 Communication	2,462	2,728		1,000		9,000		
410 Consumable Supplies and Materials	394	113		2,000		9,000		
420 Textbooks	1,252	-		-		-		
470 Computer Software	1,036	641		-		2,700		
640 Dues and Fees	77	-		1,000		-		
Total Psychological Services	264,153	256,837	0.63	242,425	2.80	486,093		
2150 - Speech Pathology and Audiology Services								
111 Licensed Salaries	487,620	610,593	8.20	604,426	15.30	1,273,933		
130 Additional Salary	4,600	4,400		17,196		6,000		
210 Public Employees Retirement System	142,499	173,430		189,427		461,107		
220 Social Security Administration	36,349	45,680		52,299		97,915		
230 Other Required Payroll Costs	5,276	7,383		7,364		15,049		
240 Contractual Employee Benefits	85,432	104,455		123,256		264,770		
310 Instructional, Professional and Technical Services	190,215	182,508		370,000		76,487		
320 Property Services	3,660	6,282		6,500		-		
340 Travel	6,078	2,216		2,100		6,600		
350 Communication	4,633	7,870		4,900		9,100		
380 Non-Instructional Professional and Technical Services	-	811		-		250		
410 Consumable Supplies and Materials	2,294	4,771		3,800		6,000		
420 Textbooks	1,707	65		-		-		
460 Non-Consumable Items	7,335	28,148		100		1,000		
470 Computer Software	24,989	11,162		8,000		28,025		
480 Computer Hardware	-	2,077		5,000		-		
640 Dues and Fees	294	-		-		-		
Total Speech Pathology and Audiology Services	1,002,979	1,191,852	8.20	1,394,368	15.30	2,246,237		
2160 - Other Student Treatment Services								
310 Instructional, Professional and Technical Services	-	-		-		550,000		
Total Other Student Treatment Services	-	-	-	-	-	550,000		
2190 - Service Direction, Student Support Services								
112 Classified Salaries	93,806	115,317	2.50	121,269	2.25	102,429		
113 Administrators	780,241	813,657	6.25	899,747	4.60	696,771		
114 Managerial - Classified	71,357	53,499	0.98	72,760	0.90	72,642		
123 Temporary - Licensed	-	900	-	-	-	20,000		
124 Temporary - Classified	-	634	-	-	-	-		
130 Additional Salary	-	-		-		6,000		
210 Public Employees Retirement System	247,540	234,559		335,467		319,347		
220 Social Security Administration	70,345	73,594		99,387		68,685		
230 Other Required Payroll Costs	10,226	841		12,837		10,592		
240 Contractual Employee Benefits	203,407	195,892		257,107		196,196		
310 Instructional, Professional and Technical Services	21,334	34,523		26,250		-		
320 Property Services	39,153	41,687		47,300		25,700		

General Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
340 Travel	9,486	3,719		3,700		3,650		
350 Communication	9,806	13,317		6,600		11,500		
380 Non-Instructional Professional and Technical Services	7,326	1,295		2,200		1,500		
410 Consumable Supplies and Materials	12,773	11,139		5,464		3,801		
420 Textbooks	1,307	-		-		500		
460 Non-Consumable Items	45,123	4,566		1,000		500		
470 Computer Software	48,935	10,144		6,000		4,750		
480 Computer Hardware	2,219	1,250		-		-		
640 Dues and Fees	730	-		4,000		4,250		
650 Insurance and Judgements	-	5,355		-		-		
Total Service Direction, Student Support Services	1,675,114	1,615,888	9.73	1,901,088	7.75	1,548,811		
2210 - Improvement of Instruction Services								
111 Licensed Salaries	41,775	120,429	1.00	78,925	3.00	269,125		
112 Classified Salaries	174,750	83,452	1.00	58,760	1.86	121,987		
113 Administrators	15,808	150,598	1.60	246,445	1.30	215,682		
114 Managerial - Classified	-	-	0.50	37,313	-	-		
123 Temporary - Licensed	2,600	-	-	-	-	-		
124 Temporary - Classified	584	-	-	-	-	-		
130 Additional Salary	-	-	-	1,800	-	9,638		
210 Public Employees Retirement System	69,089	107,910	-	131,955	-	230,071		
220 Social Security Administration	17,903	26,524	-	34,414	-	46,982		
230 Other Required Payroll Costs	2,239	4,109	-	4,987	-	7,277		
240 Contractual Employee Benefits	38,138	76,732	-	80,330	-	99,467		
310 Instructional, Professional and Technical Services	143,755	160,276	-	105,795	-	110,644		
320 Property Services	3,590	3,173	-	3,300	-	7,200		
340 Travel	9,952	217	-	3,550	-	-		
350 Communication	6,281	5,860	-	7,050	-	7,000		
380 Non-Instructional Professional and Technical Services	111,486	115,354	-	95,000	-	141,300		
410 Consumable Supplies and Materials	17,151	4,077	-	7,044	-	5,004		
460 Non-Consumable Items	999	100	-	2,000	-	-		
470 Computer Software	17,471	7,278	-	7,000	-	10,500		
480 Computer Hardware	348	3,401	-	1,000	-	-		
640 Dues and Fees	1,417	127	-	500	-	-		
650 Insurance and Judgements	86,148	-	-	-	-	-		
Total Improvement of Instruction Services	761,484	869,617	4.10	907,167	6.16	1,281,878		
2220 - Educational Media Services								
111 Licensed Salaries	46,424	41,182	1.00	55,519	1.00	61,675		
210 Public Employees Retirement System	11,057	11,270	-	16,500	-	22,067		
220 Social Security Administration	3,446	2,659	-	4,247	-	4,718		
230 Other Required Payroll Costs	485	441	-	658	-	729		
240 Contractual Employee Benefits	12,657	12,821	-	16,076	-	16,282		
310 Instructional, Professional and Technical Services	-	1,114	-	-	-	13,464		
320 Property Services	222	254	-	300	-	700		
340 Travel	1,432	3,136	-	1,200	-	3,000		
350 Communication	-	98	-	120	-	200		
440 Periodicals	-	137	-	-	-	-		
460 Non-Consumable Items	-	13	-	-	-	-		
470 Computer Software	12,923	14,048	-	15,000	-	500		
640 Dues and Fees	-	35	-	-	-	-		
Total Educational Media Services	88,647	87,208	1.00	109,620	1.00	124,135		

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2240 - Instructional Staff Development								
130 Additional Salary	-	10,800		-		-		
210 Public Employees Retirement System	-	3,147		-		-		
220 Social Security Administration	-	801		-		-		
230 Other Required Payroll Costs	-	127		-		-		
310 Instructional, Professional and Technical Services	239,202	97,872		570,343		70,500		
340 Travel	-	-		-		7,500		
380 Non-Instructional Professional and Technical Services	-	600		-		-		
410 Consumable Supplies and Materials	-	-		2,500		-		
Total Instructional Staff Development	239,202	113,348	-	572,843	-	78,000		
2310 - Board of Education Services								
340 Travel	42,650	22,766		10,200		23,000		
350 Communication	140	264		325		325		
380 Non-Instructional Professional and Technical Services	203,689	219,537		269,500		155,000		
410 Consumable Supplies and Materials	4,921	8,024		4,500		5,000		
470 Computer Software	-	331		100		500		
640 Dues and Fees	27,038	47,874		50,000		60,000		
650 Insurance and Judgements	85,205	92,642		102,500		128,000		
Total Board of Education Services	363,643	391,437	-	437,125	-	371,825		
2320 - Executive Administration Services								
112 Classified Salaries	4,968	434	0.25	16,749	-	-		
113 Administrators	168,618	183,397	1.00	185,016	1.50	282,359		
114 Managerial - Classified	65,792	69,181	0.80	72,190	1.00	93,396		
123 Temporary - Licensed	11,163	-	-	-	-	-		
124 Temporary - Classified	-	3,936	-	-	-	-		
130 Additional Salary	480	600		600		3,600		
210 Public Employees Retirement System	77,695	73,527		77,783		136,271		
220 Social Security Administration	18,088	18,646		21,942		27,928		
230 Other Required Payroll Costs	2,425	2,782		3,238		4,469		
240 Contractual Employee Benefits	54,902	66,158		63,268		85,282		
310 Instructional, Professional and Technical Services	25,324	-		-		-		
320 Property Services	800	965		1,000		2,900		
340 Travel	11,509	16,505		7,250		10,000		
350 Communication	2,403	1,513		1,230		1,430		
380 Non-Instructional Professional and Technical Services	18,411	6,318		6,500		11,000		
410 Consumable Supplies and Materials	13,955	17,191		14,000		14,000		
460 Non-Consumable Items	261	1,762		1,000		4,000		
470 Computer Software	2,753	2,597		3,500		1,500		
640 Dues and Fees	7,612	6,417		6,300		6,000		
650 Insurance and Judgements	18,000	-		-		-		
Total Executive Administration Services	505,157	471,928	2.05	481,566	2.50	684,136		
2520 - Fiscal Services								
112 Classified Salaries	105,312	113,287	2.00	122,866	2.00	142,889		
113 Administrators	147,408	185,078	1.00	161,743	1.00	165,447		
114 Managerial - Classified	67,875	73,939	1.00	73,697	1.00	76,276		
124 Temporary - Classified	19,159	-	-	-	-	-		
130 Additional Salary	-	-		7,200		12,000		
210 Public Employees Retirement System	100,245	116,909		115,145		147,360		

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
220 Social Security Administration	25,332	26,964		27,961		30,341		
230 Other Required Payroll Costs	3,292	3,957		4,355		4,714		
240 Contractual Employee Benefits	47,178	36,714		31,223		36,927		
310 Instructional, Professional and Technical Services	2,072	-		1,000		2,650		
320 Property Services	2,089	2,028		2,100		3,500		
340 Travel	9	1,851		2,000		3,000		
350 Communication	4,232	4,265		5,300		4,800		
380 Non-Instructional Professional and Technical Services	13,019	1,615		5,750		-		
410 Consumable Supplies and Materials	3,519	2,551		5,620		2,015		
460 Non-Consumable Items	119	389		1,000		500		
470 Computer Software	1,087	15,577		16,000		41,630		
640 Dues and Fees	5,722	6,489		6,000		6,000		
Total Fiscal Services	547,669	591,614	4.00	588,960	4.00	680,049		
2540 - Operation and Maintenance of Plant Services								
112 Classified Salaries	116,255	121,326	2.50	119,631	2.50	130,291		
113 Administrators	109,261	119,524	1.00	130,125	1.00	132,985		
114 Managerial - Classified	16,448	17,295	0.20	18,048	-	-		
124 Temporary - Classified	-	5,919	-	-	-	-		
210 Public Employees Retirement System	68,502	77,561		80,104		94,200		
220 Social Security Administration	19,082	20,793		22,267		20,141		
230 Other Required Payroll Costs	30,875	15,169		9,171		9,648		
240 Contractual Employee Benefits	48,122	55,291		57,533		53,068		
310 Instructional, Professional and Technical Services	-	965		-		400		
320 Property Services	758,484	274,060		332,400		344,900		
340 Travel	-	12		400		500		
350 Communication	8,104	8,298		9,700		8,150		
380 Non-Instructional Professional and Technical Services	184,937	146,852		100,000		61,400		
410 Consumable Supplies and Materials	37,640	36,887		45,348		53,500		
460 Non-Consumable Items	80,271	26,255		51,984		22,500		
470 Computer Software	3,448	1,091		1,000		1,000		
640 Dues and Fees	430	59		300		700		
650 Insurance and Judgements	57,916	77,490		90,000		90,000		
Total Operation and Maintenance of Plant Services	1,539,775	1,004,847	3.70	1,068,011	3.50	1,023,383		
2570 - Internal Services								
112 Classified Salaries	32,184	33,844	1.00	45,377	0.80	34,536		
210 Public Employees Retirement System	9,017	9,846		13,486		12,357		
220 Social Security Administration	2,462	2,589		3,471		2,642		
230 Other Required Payroll Costs	5,053	3,083		4,181		3,181		
240 Contractual Employee Benefits	7,757	7,996		8,431		8,450		
320 Property Services	10,445	2,698		3,800		10,600		
350 Communication	510	463		550		600		
410 Consumable Supplies and Materials	3,434	3,041		3,050		200		
470 Computer Software	262	56		100		200		
Total Internal Services	71,123	63,615	1.00	82,447	0.80	79,200		
2630 - Information Services								
124 Temporary - Classified	150	788	-	-	-	-		
210 Public Employees Retirement System	24	145		-		-		
220 Social Security Administration	11	60		-		-		
230 Other Required Payroll Costs	2	9		-		-		
Total Information Services	188	1,002						

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2640 - Staff Services								
112 Classified Salaries	65,130	-	0.50	30,670	2.09	114,464		
113 Administrators	140,868	181,517	1.00	152,659	1.00	160,628		
114 Managerial - Classified	77,417	197,182	2.00	153,036	1.00	91,873		
124 Temporary - Classified	21,422	3,963	-	-	-	-		
130 Additional Salary	-	-	-	-	-	12,000		
210 Public Employees Retirement System	60,846	104,945		107,587		143,623		
220 Social Security Administration	22,381	28,236		27,675		28,991		
230 Other Required Payroll Costs	8,274	14,609		16,462		54,512		
240 Contractual Employee Benefits	52,468	75,737		70,593		39,827		
310 Instructional, Professional and Technical Services	8,612	12,416		4,700		2,501		
320 Property Services	1,512	2,031		2,100		4,300		
340 Travel	48,378	3,783		1,700		3,350		
350 Communication	9,558	21,281		9,200		3,300		
380 Non-Instructional Professional and Technical Services	100,789	98,066		75,000		115,750		
390 Other General Professional and Technological Services	3,047	3,645		2,000		5,000		
410 Consumable Supplies and Materials	15,194	6,162		1,629		1,000		
440 Periodicals	-	250		-		-		
460 Non-Consumable Items	10,631	10,083		200		200		
470 Computer Software	9,281	31,826		50,000		55,000		
480 Computer Hardware	9,997	-		-		-		
640 Dues and Fees	18,694	10,506		4,500		8,000		
Total Staff Services	684,499	806,239	3.50	709,709	4.09	844,319		
2660 - Technology Services								
112 Classified Salaries	426,328	533,781	6.00	595,208	6.50	651,244		
113 Administrators	140,378	151,929	1.00	157,845	1.00	165,447		
114 Managerial - Classified	52,238	75,025	1.00	81,079	1.00	87,129		
130 Additional Salary	-	-		-		6,638		
210 Public Employees Retirement System	158,613	222,300		256,278		332,051		
220 Social Security Administration	46,138	56,692		73,893		69,650		
230 Other Required Payroll Costs	13,244	11,697		9,360		14,304		
240 Contractual Employee Benefits	120,397	138,598		154,695		139,141		
310 Instructional, Professional and Technical Services	10,038	2,116		9,000		9,000		
320 Property Services	61,729	91,302		34,100		52,200		
340 Travel	6,146	6,434		8,400		7,350		
350 Communication	301,358	318,525		297,700		355,750		
380 Non-Instructional Professional and Technical Services	7,383	9,435		35,000		26,000		
410 Consumable Supplies and Materials	4,412	2,420		4,069		4,613		
460 Non-Consumable Items	14,339	2,839		17,500		12,500		
470 Computer Software	54,455	67,034		103,200		169,016		
480 Computer Hardware	-	3,218		17,000		4,500		
610 Redemption of Principal	-	10,113		-		10,684		
621 Regular Interest	-	870		-		299		
640 Dues and Fees	309	4,809		3,500		6,500		
Total Technology Services	1,417,506	1,709,135	8.00	1,857,827	8.50	2,124,016		
2680 - Interpretation and Translation Services								
310 Instructional, Professional and Technical Services	1,662,604	1,798,500		1,705,000		2,220,000		
Total Interpretation and Translation Services	1,662,604	1,798,500		1,705,000		2,220,000		

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2690 - Other Support Services - Central								
320 Property Services	26,331	10,669		12,100		2,100		
350 Communication	(20)	-		450		1,000		
380 Non-Instructional Professional and Technical Services	-	-		-		2,500		
410 Consumable Supplies and Materials	3,723	5,782		7,701		7,500		
470 Computer Software	4,048	-		-		-		
640 Dues and Fees	60	-		-		-		
Total Other Support Services - Central	34,142	16,451	-	20,251	-	13,100		
2700 - Supplemental Retirement Program								
240 Contractual Employee Benefits	11,850	5,380		9,030		9,120		
Total Supplemental Retirement Program	11,850	5,380	-	9,030	-	9,120		
Total Support Services	11,018,203	11,101,481	46.58	12,267,969	59.70	14,928,394		
5200 - Transfers of Funds								
710 Fund Modifications	459,000	448,198		449,000		452,500		
Total Transfers of Funds	459,000	448,198		449,000		452,500		
5300 - Apportionment of Funds by ESD								
720 Transits	4,755,555	3,597,999		3,297,987		4,010,894		
Total Apportionment of Funds by ESD	4,755,555	3,597,999		3,297,987		4,010,894		
Total Other Uses	5,214,555	4,046,197		3,746,987		4,463,394		
6000 - Contingencies								
810 Planned Reserve	-	-		1,265,842		650,000		
Total Contingencies	-	-		1,265,842		650,000		
7000 - Unappropriated Ending Fund Balance								
820 Reserved for Next Year	-	-		800,000		1,833,453		
Total Unappropriated Ending Fund Balance	-	-		800,000		1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Service Area

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Programs for Children with Special Needs								
Innovation/Special Projects	95,589	123,540	-	165,000	-	123,923		
Life Skills Consortium Placements	11,813,475	12,491,421	148.30	13,086,144	154.57	15,306,505		
Lane School Placements	2,258,626	2,376,400	22.68	2,555,496	17.93	2,161,500		
Behavior Disorder Consultants	350,384	404,053	1.15	174,117	0.95	148,500		
School Psychologists	275,522	262,746	0.65	247,248	2.90	504,000		
Speech Language Pathologists	475,193	572,475	3.33	534,704	7.15	1,085,000		
Augmentative Communication	145,911	230,265	1.58	238,028	1.45	256,000		
Direction Service	82,433	60,827	-	86,604	-	86,948		
Nursing Services	38,285	24,425	0.63	88,388	0.85	136,000		
Other Contracted Services	1,867,278	2,076,718	2.00	1,965,647	-	2,220,000		
Total Programs for Children with Special Needs	17,402,695	18,622,870	180.31	19,141,376	185.79	22,028,376		
Technology Support								
Technology Services	1,045,796	1,222,571	4.45	1,352,591	4.50	1,487,160		
Application Hosting and Management	-	-	-	-	-	13,416		
Total Technology Support	1,045,796	1,222,571	4.45	1,352,591	4.50	1,500,576		
School Improvement Services								
School Improvement Services	330,733	407,420	2.10	571,791	4.41	900,025		
Promise Programs	80,223	82,348	0.25	73,370	0.25	81,352		
Lane Career Academy	-	-	-	-	2.00	306,490		
Career and Technical Education	184,939	188,622	1.75	192,006	1.50	224,200		
Library Services	88,647	87,208	1.00	109,620	1.00	124,135		
Professional Development	237,202	95,673	-	563,343	-	-		
Total School Improvement Services	921,744	861,271	5.10	1,510,129	9.16	1,636,202		
Administrative and Support Services								
Home Schooling	39,633	27,312	0.30	35,874	0.30	39,424		
Attendance and Truancy Services	11,827	4,208	0.05	5,541	-	-		
Connected Lane County	70,000	70,000	-	70,000	-	76,300		
Substitute List Subscription	-	-	-	-	0.09	9,266		
Courier Services	71,123	63,615	1.00	82,447	0.80	79,200		
Business Services	70,800	27,150	-	40,000	-	-		
Superintendent Services	14,963	-	-	-	-	-		
Communications Services	188	1,002	-	-	-	-		
Total Administrative and Support Services	278,534	193,286	1.35	233,861	1.19	204,190		
Administration	3,582,370	3,569,121	14.74	3,771,693	14.65	4,175,299		
Transits to Districts	4,755,555	3,597,999	-	3,297,987	-	4,010,894		
Contingencies	-	-	-	1,265,842	-	650,000		
Unappropriated Ending Fund Balance	-	-	-	800,000	-	1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Cost Center

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Core Services								
110 Technology Services	1,045,796	1,222,571	4.45	1,352,591	4.50	1,487,160		
224 School Improvement Services	330,733	407,420	2.10	571,791	4.41	900,025		
225 Lane Career Academy	-	-	-	-	2.00	306,490		
330 Life Skills Program	-	-	-	-	-	100,000		
510 Innovation/Special Projects	95,589	123,540	-	165,000	-	123,923		
515 Promise Programs	80,223	82,348	0.25	73,370	0.25	81,352		
520 Connected Lane County	70,000	70,000	-	70,000	-	76,300		
Total Core Services	1,622,342	1,905,878	6.80	2,232,752	11.16	3,075,250		
Menu Services								
016 Central Services	-	-	-	-	-	93,402		
017 Facilities - Westmoreland	339,089	318,629	0.75	312,320	1.35	308,726		
226 Career and Technical Education	184,939	188,622	1.75	192,006	1.50	192,766		
300 Special Education Direction	419,114	399,543	1.95	405,866	4.90	895,324		
310 School Psychologist Services	275,522	262,746	0.65	247,248	2.80	464,943		
330 Life Skills Program	10,849,473	11,208,825	139.34	11,625,849	126.88	11,931,053		
335 Intensive Services Program - Behavior	472,120	815,533	7.00	990,382	8.03	753,224		
340 Intensive Services Program - Medical	-	-	-	-	15.33	1,706,149		
360 Lane School Program	1,992,305	2,125,291	21.94	2,307,225	16.41	1,845,155		
362 Behavior Consultant Services	350,384	404,053	1.15	174,117	0.90	139,547		
380 Direction Service	82,433	60,827	-	86,604	-	86,948		
385 Augmentative Communication Services	145,911	230,265	1.58	238,028	1.40	228,667		
390 Speech Language Pathologist Services	475,193	572,475	3.33	534,704	7.00	1,058,140		
395 Other Contracted Services	1,851,356	2,059,593	2.00	1,965,647	-	2,220,000		
400 Substitute List Subscription	-	-	-	-	0.09	9,266		
410 Courier Services	71,123	63,615	1.00	82,447	0.80	76,726		
430 Attendance and Truancy Services	11,827	4,208	0.05	5,541	-	-		
450 Superintendent Services	14,963	-	-	-	-	-		
450 Application Hosting and Management	-	-	-	-	-	13,416		
500 Library Services	88,647	87,208	1.00	109,620	1.00	116,878		
525 Professional Development	237,202	95,673	-	563,343	-	-		
526 Communications Services	188	1,002	-	-	-	-		
527 Nursing Services	38,285	24,425	0.63	88,388	0.80	114,340		
528 Youth Transition Program Services	15,922	17,125	-	-	-	-		
530 Transits to Districts	4,755,555	3,597,999	-	3,297,987	-	4,010,894		
Total Menu Services	22,671,550	22,537,657	184.11	23,227,319	189.17	26,265,564		
Administration								
010 Board of Education	363,643	391,437	-	437,125	-	371,825		
011 Office of Superintendent	490,194	487,404	2.05	487,066	2.50	684,136		
012 Human Resources	698,349	813,818	3.50	722,739	3.00	737,990		
013 Business Services	547,669	591,614	4.00	588,960	4.00	680,049		
014 Facilities - Main Campus	1,042,981	915,577	2.14	984,656	2.00	955,354		
015 Technology Services	476,192	566,335	3.05	570,895	3.00	587,558		
017 Facilities - Westmoreland	-	-	-	-	0.15	34,304		
019 Central Services	34,142	(169,913)	-	20,251	-	124,083		
080 Home Schooling	39,633	27,312	0.30	35,874	0.30	39,424		
Total Administration	3,692,803	3,623,583	15.04	3,847,567	14.95	4,214,723		
Contingencies	-	-	-	1,265,842	-	650,000		
Unappropriated Ending Fund Balance	-	-	-	800,000	-	1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	46,038,990		

Special Revenue Fund

The Special Revenue Fund accounts for the proceeds of specific revenue sources that are legally restricted to expenditure for specified purposes.



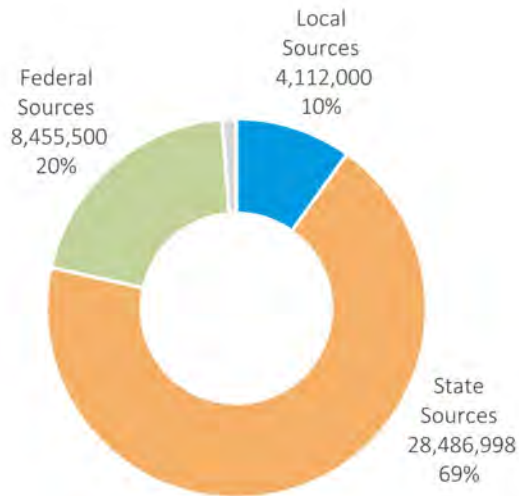
Lane ESD's summer migrant education program centers on culture, community, relationships, and learning.

Special Revenue Fund

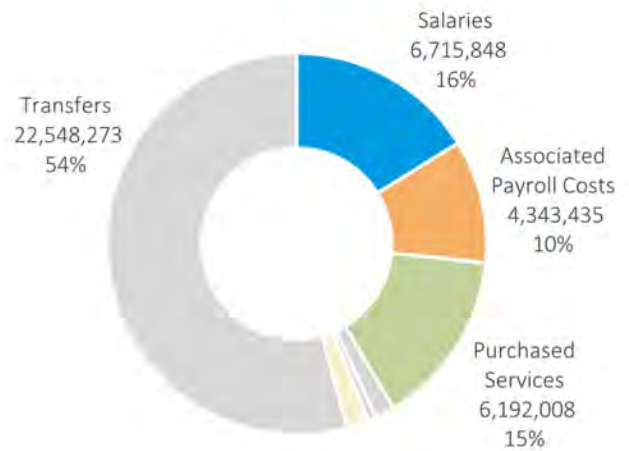
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	3,083,899	3,182,225		4,062,000		4,112,000		
3000 State Sources	26,238,534	21,354,968		26,629,500		28,486,998		
4000 Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 Other Sources	1,088,049	1,329,276		357,500		500,500		
Total Resources	38,083,524	34,169,272		39,965,000		41,554,998		
Requirements								
100 Salaries	6,264,491	6,974,667	85.43	6,887,637	79.38	6,715,848		
200 Associated Payroll Costs	3,360,292	3,912,201		4,110,181		4,343,435		
300 Purchased Services	4,981,784	3,332,292		3,775,600		6,192,008		
400 Supplies and Materials	1,252,435	1,113,559		1,696,288		690,578		
500 Capital Outlay	765,357	981,506		305,000		280,000		
600 Other Objects	970,734	845,029		1,084,970		784,856		
700 Transfers	19,386,155	16,439,074		22,105,324		22,548,273		
Total Requirements	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		
ENDING FUND BALANCE	1,102,277	570,944						

Resources



Requirements



Special Revenue Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1920 Contributions, Donations, and General Fundraising from Private Sources	205,372	81,010		481,000		625,000		
1940 Services Provided Other Local Education Agencies	2,670,156	2,884,067		3,490,000		3,375,000		
1960 Recovery of Prior Years' Expenditure	-	11,625		-		25,000		
1990 Miscellaneous	208,371	205,523		91,000		87,000		
Total Revenue from Local Sources	3,083,899	3,182,225		4,062,000		4,112,000		
3000 - Revenue from State Sources								
3299 Other Restricted Grants-in-aid	26,238,534	21,354,968		26,629,500		28,486,998		
Total Revenue from State Sources	26,238,534	21,354,968		26,629,500		28,486,998		
4000 - Revenue from Federal Sources								
4300 Restricted Revenue Direct from the Federal Government	4,160	249,201		110,000		-		
4500 Restricted Revenue From the Federal Government Through the State	7,583,177	7,902,957		8,701,000		8,360,500		
4700 Grants-In-Aid From the Federal Government Through Other Intermediate Agencies	82,042	150,644		100,000		95,000		
4900 Revenue for/on Behalf of the District	3,663	-		5,000		-		
Total Revenue from Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 - Revenue from Other Sources								
5200 Interfund Transfers	159,185	163,198		166,500		177,500		
5400 Beginning Fund Balances	928,865	1,166,079		191,000		323,000		
Total Revenue from Other Sources	1,088,049	1,329,276		357,500		500,500		
TOTAL RESOURCES	38,083,524	34,169,272		39,965,000		41,554,998		

Special Revenue Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
100 - Salaries								
111 Licensed Salaries	2,686,408	2,780,904	32.23	2,853,487	30.60	2,852,751		
112 Classified Salaries	2,210,876	2,741,833	47.22	2,765,742	44.08	2,693,948		
113 Administrators	508,090	847,717	5.15	717,612	4.60	707,343		
114 Managerial - Classified	65,020	63,761	0.53	39,179	0.10	8,071		
123 Temporary - Licensed	610,132	457,865	0.30	289,633	-	200,000		
124 Temporary - Classified	178,765	71,137	-	150,000	-	100,000		
130 Additional Salary	5,200	11,450	-	71,984	-	153,735		
Total Salaries	6,264,491	6,974,667	85.43	6,887,637	79.38	6,715,848		
200 - Associated Payroll Costs								
210 Public Employees Retirement System	1,662,693	2,012,313		2,105,148		2,457,575		
220 Social Security Administration	474,102	524,645		604,456		513,762		
230 Other Required Payroll Costs	112,789	82,001		81,684		101,626		
240 Contractual Employee Benefits	1,110,707	1,293,242		1,318,893		1,270,471		
Total Associated Payroll Costs	3,360,292	3,912,201		4,110,181		4,343,435		
300 - Purchased Services								
310 Instructional, Professional and Technical Services	2,238,553	1,696,363		2,273,000		4,741,643		
320 Property Services	80,473	65,350		47,300		81,000		
330 Student Transportation Services	34,948	88,036		-		-		
340 Travel	339,478	228,293		191,400		176,350		
350 Communication	276,020	128,370		54,800		48,145		
374 Other Tuition	380,804	193,599		425,000		292,721		
380 Non-Instructional Professional and Technical Services	1,631,508	932,282		784,100		852,150		
Total Purchased Services	4,981,784	3,332,292		3,775,600		6,192,008		
400 - Supplies and Materials								
410 Consumable Supplies and Materials	566,593	578,483		1,107,442		448,569		
420 Textbooks	63,030	11,852		23,100		10,000		
430 Library Books	11,219	-		-		-		
440 Periodicals	-	25		-		-		
450 Food	3,663	-		5,000		-		
460 Non-Consumable Items	167,612	165,443		215,843		59,000		
470 Computer Software	354,172	290,171		269,000		138,010		
480 Computer Hardware	86,146	67,584		75,903		35,000		
Total Supplies and Materials	1,252,435	1,113,559		1,696,288		690,578		
500 - Capital Outlay								
540 Depreciable Equipment	67,027	249,201		100,000		-		
550 Depreciable Technology	-	654,615		205,000		280,000		
590 Other Capital Outlay	698,330	77,690		-		-		
Total Capital Outlay	765,357	981,506		305,000		280,000		

Special Revenue Fund

Requirements by Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
600 - Other Objects								
640 Dues and Fees	30,668	32,044		19,100		45,300		
690 Grant Indirect Charges	940,066	812,985		1,065,870		739,556		
Total Other Objects	970,734	845,029		1,084,970		784,856		
700 - Transfers								
710 Fund Modifications	-	-		2,500		-		
720 Transits	19,386,155	16,439,074		22,102,824		22,548,273		
Total Transfers	19,386,155	16,439,074		22,105,324		22,548,273		
TOTAL REQUIREMENTS	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		

Special Revenue Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Instruction								
1111 Elementary, K-5 or K-6	-	37,211		-		-		
1121 Middle/Junior High School Programs	-	2,161		-		-		
1140 Pre-Kindergarten Programs	767	-	-	-	-	-		
1220 Restrictive Programs for Students with Disabilities	486,733	496,576	3.40	1,096,214	6.10	1,417,073		
1250 Less Restrictive Programs for Students with Disabilities	1,385,315	1,582,246	8.00	1,265,303	9.00	1,427,200		
1280 Alternative Education	-	6,261	2.00	162,500	-	-		
1293 Migrant Education	721,057	674,918	0.50	148,750	0.80	392,228		
1294 Youth Corrections Education	501,195	419,884	3.20	569,352	3.00	482,696		
1400 Summer School Programs	2,090	33,002	0.05	10,716	0.05	20,000		
Total Instruction	3,097,157	3,252,258	17.15	3,252,835	18.95	3,739,197		
2000 - Support Services								
2110 Attendance and Social Work Services	881,112	814,781	7.50	867,250	4.61	532,772		
2120 Guidance Services	897,273	1,029,380	1.70	325,060	1.50	242,569		
2130 Health Services	21,091	54,230	-	55,000	-	53,000		
2150 Speech Pathology and Audiology Services	7,274	-	-	3,000	0.50	80,293		
2190 Service Direction, Student Support Services	128,957	178,619	0.58	179,248	1.30	346,507		
2210 Improvement of Instruction Services	5,349,770	4,586,035	19.63	5,863,092	15.37	6,870,453		
2240 Instructional Staff Development	3,581,605	3,409,294	9.43	3,728,371	8.75	3,539,434		
2540 Operation and Maintenance of Plant Services	763,749	329,294	-	110,000	-	-		
2550 Student Transportation Services	5,729	-	-	-	-	-		
2620 Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services	41,658	125	-	-	-	-		
2640 Staff Services	171,385	17,925	-	74,284	-	47,500		
2660 Technology Services	259,864	830,656	1.00	366,536	-	355,000		
2680 Interpretation and Translation Services	2,325,014	2,596,694	28.44	2,960,000	28.40	3,120,000		
Total Support Services	14,434,480	13,847,033	68.28	14,531,841	60.43	15,187,528		
3000 - Enterprise and Community Services								
3100 Food Services	63,455	59,963	-	75,000	-	80,000		
Total Enterprise and Community Services	63,455	59,963	-	75,000	-	80,000		
5000 - Other Uses								
5200 Transfers of Funds	-	-		2,500		-		
5300 Apportionment of Funds by ESD	19,386,155	16,439,074		22,102,824		22,548,273		
Total Other Uses	19,386,155	16,439,074		22,105,324		22,548,273		
TOTAL REQUIREMENTS	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		

Special Revenue Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1111 - Elementary, K-5 or K-6								
310 Instructional, Professional and Technical Services	-	35,736		-		-		
640 Dues and Fees	-	1,475		-		-		
Total Elementary, K-5 or K-6	-	37,211	-	-	-	-		
1121 - Middle/Junior High School Programs								
310 Instructional, Professional and Technical Services	-	736		-		-		
640 Dues and Fees	-	1,425		-		-		
Total Middle/Junior High School Programs	-	2,161	-	-	-	-		
1140 - Pre-Kindergarten Programs								
340 Travel	145	-		-		-		
410 Consumable Supplies and Materials	575	-		-		-		
420 Textbooks	47	-		-		-		
Total Pre-Kindergarten Programs	767		-	-	-	-		
1220 - Restrictive Programs for Students with Disabilities								
111 Licensed Salaries	255,183	308,137	3.40	299,356	6.10	548,734		
112 Classified Salaries	30,784	-	-	-	-	-		
130 Additional Salary	-	2,650		3,510		6,000		
210 Public Employees Retirement System	78,222	90,449		92,271		204,585		
220 Social Security Administration	21,820	23,576		26,728		42,437		
230 Other Required Payroll Costs	4,939	3,647		3,566		6,526		
240 Contractual Employee Benefits	54,083	61,715		56,428		100,701		
310 Instructional, Professional and Technical Services	399	-		500,000		500,000		
320 Property Services	431	492		500		900		
340 Travel	1,295	602		1,000		700		
350 Communication	1,148	2,655		2,700		-		
380 Non-Instructional Professional and Technical Services	550	-		-		-		
410 Consumable Supplies and Materials	265	739		6,305		4,490		
420 Textbooks	2,855	80		100		-		
460 Non-Consumable Items	4,157	-		-		-		
470 Computer Software	2,367	1,462		2,500		2,000		
480 Computer Hardware	-	18		-		-		
640 Dues and Fees	555	-		-		-		
690 Grant Indirect Charges	27,680	354		101,250		-		
Total Restrictive Programs for Students with Disabilities	486,733	496,576	3.40	1,096,214	6.10	1,417,073		
1250 - Less Restrictive Programs for Students with Disabilities								
111 Licensed Salaries	654,746	751,936	8.00	662,968	9.00	767,347		
112 Classified Salaries	21,704	11,837	-	-	-	-		
123 Temporary - Licensed	9,809	11,531	-	-	-	-		
210 Public Employees Retirement System	199,520	237,018		204,650		283,367		
220 Social Security Administration	52,051	58,278		56,646		58,702		
230 Other Required Payroll Costs	11,174	9,013		7,786		9,008		
240 Contractual Employee Benefits	133,600	161,043		146,354		195,576		
310 Instructional, Professional and Technical Services	130,175	94,059		106,000		4,500		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
330 Student Transportation Services	-	150	-	-	-	-	-	-
340 Travel	19,072	16,720	-	15,100	-	9,000	-	-
350 Communication	5,960	8,958	-	12,350	-	13,500	-	-
380 Non-instructional Professional and Technical Services	110	-	-	-	-	-	-	-
410 Consumable Supplies and Materials	5,874	1,986	-	27,949	-	26,750	-	-
420 Textbooks	448	-	-	-	-	-	-	-
460 Non-Consumable Items	19,704	38,081	-	17,000	-	5,000	-	-
470 Computer Software	5,646	4,742	-	3,500	-	4,450	-	-
480 Computer Hardware	2,370	4,379	-	5,000	-	-	-	-
640 Dues and Fees	229	96	-	-	-	-	-	-
690 Grant Indirect Charges	113,122	172,417	-	-	-	50,000	-	-
Total Less Restrictive Programs for Students with Disabilities	1,385,315	1,582,246	8.00	1,265,303	9.00	1,427,200		
1280 - Alternative Education								
111 Licensed Salaries	-	-	1.00	56,736	-	-	-	-
112 Classified Salaries	-	4,353	1.00	36,406	-	-	-	-
210 Public Employees Retirement System	-	213	-	28,716	-	-	-	-
220 Social Security Administration	-	307	-	8,510	-	-	-	-
230 Other Required Payroll Costs	-	51	-	1,110	-	-	-	-
240 Contractual Employee Benefits	-	1,336	-	26,667	-	-	-	-
410 Consumable Supplies and Materials	-	-	-	4,356	-	-	-	-
Total Alternative Education	-	6,261	2.00	162,500	-	-		
1293 - Migrant Education								
111 Licensed Salaries	1,315	-	-	-	-	-	-	-
112 Classified Salaries	25,448	91,821	0.50	41,884	0.50	43,350	-	-
113 Administrators	114,490	91,481	-	-	0.30	48,188	-	-
123 Temporary - Licensed	86,171	103,035	-	-	-	-	-	-
124 Temporary - Classified	19,003	40,205	-	-	-	-	-	-
130 Additional Salary	-	-	-	838	-	871	-	-
210 Public Employees Retirement System	54,648	80,527	-	12,697	-	33,064	-	-
220 Social Security Administration	18,561	24,763	-	3,268	-	7,069	-	-
230 Other Required Payroll Costs	3,727	4,358	-	516	-	3,262	-	-
240 Contractual Employee Benefits	26,709	26,786	-	4,275	-	13,945	-	-
310 Instructional, Professional and Technical Services	85,035	32,099	-	-	-	200,000	-	-
320 Property Services	28,414	15,612	-	4,500	-	2,150	-	-
330 Student Transportation Services	26,998	84,355	-	-	-	-	-	-
340 Travel	15,420	20,007	-	5,000	-	1,200	-	-
350 Communication	11,571	15,696	-	5,250	-	4,100	-	-
380 Non-instructional Professional and Technical Services	60,887	4,782	-	-	-	-	-	-
410 Consumable Supplies and Materials	75,464	18,439	-	9,753	-	35,027	-	-
420 Textbooks	28,886	7,640	-	10,000	-	-	-	-
460 Non-Consumable Items	-	34	-	-	-	-	-	-
470 Computer Software	2,886	4,500	-	5,000	-	-	-	-
640 Dues and Fees	1,565	13	-	-	-	-	-	-

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
690 Grant Indirect Charges	33,858	8,766		45,770		-		
Total Migrant Education	721,057	674,918	0.50	148,750	0.80	392,228		
1294 - Youth Corrections Education								
111 Licensed Salaries	252,001	252,949	3.20	289,891	3.00	276,355		
130 Additional Salary	-	-		3,600		6,000		
210 Public Employees Retirement System	58,564	77,683		90,477		104,175		
220 Social Security Administration	19,495	19,718		26,682		21,600		
230 Other Required Payroll Costs	4,012	2,960		3,439		3,333		
240 Contractual Employee Benefits	63,624	49,138		57,865		45,936		
310 Instructional, Professional and Technical Services	79,439	-		-		-		
320 Property Services	622	711		700		2,200		
340 Travel	92	3		-		-		
350 Communication	535	624		800		-		
380 Non-Instructional Professional and Technical Services	36	-		-		-		
410 Consumable Supplies and Materials	4,562	4,809		85,798		17,598		
420 Textbooks	667	-		-		-		
460 Non-Consumable Items	6,646	741		1,000		-		
470 Computer Software	375	712		1,000		3,000		
480 Computer Hardware	8,811	274		-		2,500		
690 Grant Indirect Charges	1,714	9,561		8,100		-		
Total Youth Corrections Education	501,195	419,884	3.20	569,352	3.00	482,696		
1400 - Summer School Programs								
112 Classified Salaries	-	2,129	0.05	3,819	0.05	3,655		
123 Temporary - Licensed	-	9,500		-		-		
124 Temporary - Classified	-	8,470		-		-		
210 Public Employees Retirement System	-	2,948		1,135		1,308		
220 Social Security Administration	-	1,538		292		280		
230 Other Required Payroll Costs	-	238		45		43		
240 Contractual Employee Benefits	-	262		425		423		
310 Instructional, Professional and Technical Services	-	3,200		-		-		
330 Student Transportation Services	-	640		-		-		
340 Travel	-	138		-		300		
380 Non-Instructional Professional and Technical Services	-	-		-		4,000		
410 Consumable Supplies and Materials	2,090	3,942		5,000		9,992		
Total Summer School Programs	2,090	33,002	0.05	10,716	0.05	20,000		
Total Instruction	3,097,157	3,252,258	17.15	3,252,835	18.95	3,739,197		
2110 - Attendance and Social Work Services								
111 Licensed Salaries	2,602	43,797	1.00	70,816	-	-		
112 Classified Salaries	458,546	375,577	6.50	411,752	4.61	289,427		
123 Temporary - Licensed	15,251	19,309	-	-	-	-		
130 Additional Salary	-	-		12,625		5,817		
210 Public Employees Retirement System	128,475	129,298		149,112		107,888		
220 Social Security Administration	35,981	32,617		43,219		22,586		
230 Other Required Payroll Costs	7,517	5,105		6,072		5,735		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
240 Contractual Employee Benefits	69,541	84,263		99,646		60,931		
310 Instructional, Professional and Technical Services	6,750	1,483		1,000		-		
320 Property Services	315	14,156		15,000		4,150		
340 Travel	32,768	6,540		7,500		100		
350 Communication	7,622	5,257		3,500		5,200		
380 Non-Instructional Professional and Technical Services	3,106	24,345		100		-		
410 Consumable Supplies and Materials	32,678	34,666		2,909		6,000		
420 Textbooks	17,057	583		1,000		-		
460 Non-Consumable Items	2,407	-		-		-		
470 Computer Software	12,483	9,599		1,000		2,500		
480 Computer Hardware	4,495	339		-		2,500		
640 Dues and Fees	1,573	-		-		500		
690 Grant Indirect Charges	41,944	27,846		42,000		19,440		
Total Attendance and Social Work Services	881,112	814,781	7.50	867,250	4.61	537,772		
2120 - Guidance Services								
111 Licensed Salaries	155,098	83,133	1.00	71,032	1.50	144,298		
112 Classified Salaries	98,873	121,974	-	-	-	-		
113 Administrators	3,888	3,745	0.70	93,087	-	-		
210 Public Employees Retirement System	62,939	56,517		50,793		51,630		
220 Social Security Administration	19,520	15,515		13,939		11,039		
230 Other Required Payroll Costs	4,226	2,457		1,928		1,694		
240 Contractual Employee Benefits	48,943	46,184		24,422		17,659		
310 Instructional, Professional and Technical Services	268,062	345,982		-		750		
320 Property Services	-	-		-		600		
340 Travel	2,321	1,172		10,000		950		
350 Communication	1,098	6,399		200		25		
374 Other Tuition	10,012	-		-		-		
380 Non-Instructional Professional and Technical Services	70,357	390		-		-		
410 Consumable Supplies and Materials	5,142	122,987		42,658		5,319		
460 Non-Consumable Items	18,835	115,337		-		-		
470 Computer Software	-	6,414		-		-		
480 Computer Hardware	16,007	21,124		-		-		
540 Depreciable Equipment	67,027	-		-		-		
640 Dues and Fees	409	-		-		-		
690 Grant Indirect Charges	44,518	80,050		17,000		8,606		
Total Guidance Services	897,273	1,029,380	1.70	325,060	1.50	242,569		
2130 - Health Services								
111 Licensed Salaries	(131)	27,165	-	-	-	-		
112 Classified Salaries	7,274	2,640	-	-	-	-		
210 Public Employees Retirement System	2,070	7,883	-	-	-	-		
220 Social Security Administration	552	2,146	-	-	-	-		
230 Other Required Payroll Costs	101	448	-	-	-	-		
240 Contractual Employee Benefits	1,391	5,272	-	-	-	-		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
310 Instructional, Professional and Technical Services	-	2,075		35,000		40,000		
340 Travel	230	-		-		-		
410 Consumable Supplies and Materials	1,385	1,351		18,000		13,000		
460 Non-Consumable Items	8,219	-		-		-		
640 Dues and Fees	-	5,250		-		-		
690 Grant Indirect Charges	-	-		2,000		-		
Total Health Services	21,091	54,230		55,000		53,000		
2150 - Speech Pathology and Audiology Services								
111 Licensed Salaries	-	-	-	-	0.50	52,183		
210 Public Employees Retirement System	-	-	-	-		18,671		
220 Social Security Administration	-	-	-	-		3,992		
230 Other Required Payroll Costs	-	-	-	-		611		
240 Contractual Employee Benefits	-	-	-	-		4,835		
410 Consumable Supplies and Materials	73	-	-	-		-		
460 Non-Consumable Items	6,821	-	-	3,000		-		
470 Computer Software	380	-	-	-		-		
Total Speech Pathology and Audiology Services	7,274	-	-	3,000	0.50	80,293		
2190 - Service Direction, Student Support Services								
112 Classified Salaries	-	-	-	-	0.50	22,329		
113 Administrators	49,589	92,767	0.55	78,638	0.70	108,718		
114 Managerial - Classified	1,830	-	0.03	1,866	0.10	8,071		
210 Public Employees Retirement System	15,816	28,941	-	25,309	-	52,757		
220 Social Security Administration	3,909	7,078	-	6,218	-	10,643		
230 Other Required Payroll Costs	818	1,067	-	942	-	1,635		
240 Contractual Employee Benefits	7,048	16,537	-	9,774	-	31,646		
320 Property Services	4,979	4,290	-	4,400	-	11,100		
340 Travel	213	912	-	600	-	5,000		
350 Communication	-	537	-	500	-	-		
380 Non-Instructional Professional and Technical Services	-	13,080	-	-	-	35,000		
460 Non-Consumable Items	-	-	-	-	-	2,000		
470 Computer Software	-	232	-	-	-	500		
640 Dues and Fees	-	-	-	-	-	1,000		
690 Grant Indirect Charges	44,755	13,177	-	51,000	-	56,108		
Total Service Direction, Student Support Services	128,957	178,619	0.58	179,248	1.30	346,507		
2210 - Improvement of Instruction Services								
111 Licensed Salaries	867,456	876,168	10.63	1,012,485	7.00	722,102		
112 Classified Salaries	292,849	326,049	6.10	369,938	6.47	418,159		
113 Administrators	274,398	457,601	2.40	339,107	1.90	288,374		
114 Managerial - Classified	63,190	63,761	0.50	37,313	-	-		
123 Temporary - Licensed	267,183	36,970	-	-	-	-		
124 Temporary - Classified	24,731	6,980	-	-	-	-		
130 Additional Salary	-	-	-	23,400	-	31,047		
210 Public Employees Retirement System	475,988	522,008	-	548,185	-	533,523		
220 Social Security Administration	135,473	133,905	-	156,662	-	111,666		
230 Other Required Payroll Costs	40,197	20,317	-	21,097	-	17,258		
240 Contractual Employee Benefits	238,462	267,960	-	308,248	-	221,960		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
310 Instructional, Professional and Technical Services	873,955	532,509		1,130,000		3,513,393		
320 Property Services	8,974	13,543		5,200		27,650		
330 Student Transportation Services	2,222	2,890				-		
340 Travel	175,668	137,414		93,200		93,100		
350 Communication	21,718	12,183		2,800		1,170		
374 Other Tuition	22,616	13,675		-		-		
380 Non-Instructional Professional and Technical Services	551,863	319,149		195,000		273,150		
410 Consumable Supplies and Materials	339,109	364,613		820,646		218,894		
420 Textbooks	9,509	1,744		10,000		-		
430 Library Books	11,219	-		-		-		
440 Periodicals	-	25		-		-		
460 Non-Consumable Items	97,748	7,244		164,559		32,000		
470 Computer Software	193,589	214,407		191,000		17,950		
480 Computer Hardware	49,607	6,833		10,903		5,000		
640 Dues and Fees	25,906	13,961		11,100		30,300		
690 Grant Indirect Charges	286,140	234,127		412,250		313,760		
Total Improvement of Instruction Services	5,349,770	4,586,035	19.63	5,863,092	15.37	6,870,453		
2240 - Instructional Staff Development								
111 Licensed Salaries	498,138	437,618	4.00	390,204	3.50	341,732		
112 Classified Salaries	185,054	246,478	4.13	269,202	3.95	281,377		
113 Administrators	-	140,595	1.00	132,109	1.30	199,589		
123 Temporary - Licensed	231,718	275,141	0.30	289,633	-	200,000		
124 Temporary - Classified	135,030	11,855	-	150,000	-	100,000		
130 Additional Salary	-	-		3,600		6,000		
210 Public Employees Retirement System	282,699	322,870		377,135		413,410		
220 Social Security Administration	78,977	82,513		108,257		86,345		
230 Other Required Payroll Costs	16,989	12,916		14,589		31,066		
240 Contractual Employee Benefits	152,315	178,090		167,888		168,019		
310 Instructional, Professional and Technical Services	792,267	646,627		475,000		481,000		
320 Property Services	23,942	4,695		4,800		18,450		
340 Travel	69,673	38,519		53,000		56,000		
350 Communication	5,783	5,305		6,700		1,150		
374 Other Tuition	348,176	179,924		425,000		292,721		
380 Non-Instructional Professional and Technical Services	418,631	496,298		500,000		451,000		
410 Consumable Supplies and Materials	80,908	23,322		55,755		83,000		
420 Textbooks	3,608	1,804		2,000		10,000		
460 Non-Consumable Items	699	-		5,000		-		
470 Computer Software	18,789	32,808		40,000		45,610		
480 Computer Hardware	2,288	2,077		5,000		-		
640 Dues and Fees	401	3,153		7,000		7,500		
690 Grant Indirect Charges	235,520	266,687		246,500		265,467		
Total Instructional Staff Development	3,581,605	3,409,294	9.43	3,728,371	8.75	3,539,434		
2540 - Operation and Maintenance of Plant Services								
380 Non-Instructional Professional and Technical Services	65,418	2,403		10,000		-		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
480 Computer Hardware	698,330	-		-		-		
540 Depreciable Equipment	-	249,201		100,000		-		
590 Other Capital Outlay	-	77,690		-		-		
Total Operation and Maintenance of Plant Services	763,749	329,294	-	110,000	-	-		
2550 - Student Transportation Services								
330 Student Transportation Services	5,729	-		-		-		
Total Student Transportation Services	5,729	-	-	-	-	-		
2620 - Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services								
320 Property Services	2,071	-		-		-		
340 Travel	1,798	125		-		-		
380 Non-Instructional Professional and Technical Services	22,542	-		-		-		
410 Consumable Supplies and Materials	15,247	-		-		-		
Total Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services	41,658	125	-	-	-	-		
2640 - Staff Services								
123 Temporary - Licensed	-	2,378		-		-		
124 Temporary - Classified	-	3,628		-		-		
210 Public Employees Retirement System	-	1,683		-		-		
220 Social Security Administration	-	436		-		-		
230 Other Required Payroll Costs	-	71		-		-		
240 Contractual Employee Benefits	-	20		-		-		
310 Instructional, Professional and Technical Services	-	-		25,000		-		
340 Travel	17,983	-		-		-		
350 Communication	130,521	-		-		-		
380 Non-Instructional Professional and Technical Services	19,972	-		-		-		
410 Consumable Supplies and Materials	2,909	1,481		25,000		27,500		
460 Non-Consumable Items	-	1,992		24,284		20,000		
640 Dues and Fees	-	6,237		-		-		
Total Staff Services	171,385	17,925	-	74,284	-	47,500		
2660 - Technology Services								
112 Classified Salaries	48,879	55,260	1.00	58,760	-	-		
130 Additional Salary	-	-	-	1,175	-	-		
210 Public Employees Retirement System	9,635	16,334		17,813		-		
220 Social Security Administration	3,613	4,206		4,585		-		
230 Other Required Payroll Costs	793	651		737		-		
240 Contractual Employee Benefits	7,818	7,772		8,466		-		
310 Instructional, Professional and Technical Services	-	1,057		-		-		
350 Communication	75,153	50,594		-		-		
460 Non-Consumable Items	-	1,508		-		-		
470 Computer Software	113,972	10,272		20,000		50,000		
480 Computer Hardware	-	28,387		50,000		25,000		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
550 Depreciable Technology	-	654,615		205,000		280,000		
Total Technology Services	259,864	830,656	1.00	366,536	-	355,000		
2680 - Interpretation and Translation Services								
112 Classified Salaries	1,041,465	1,503,714	27.94	1,573,982	28.00	1,635,653		
113 Administrators	65,725	61,528	0.50	74,671	0.40	62,474		
130 Additional Salary	5,200	8,800	-	23,237	-	98,000		
210 Public Employees Retirement System	294,118	437,940		506,857		653,199		
220 Social Security Administration	84,148	118,049		149,449		137,404		
230 Other Required Payroll Costs	18,296	18,705		19,855		21,456		
240 Contractual Employee Benefits	307,172	386,865		408,438		408,839		
310 Instructional, Professional and Technical Services	2,470	800		1,000		2,000		
320 Property Services	10,725	11,850		12,200		13,800		
340 Travel	2,801	6,141		6,000		10,000		
350 Communication	14,912	20,162		20,000		23,000		
380 Non-Instructional Professional and Technical Services	358,243	12,307		10,000		10,000		
410 Consumable Supplies and Materials	311	147		3,312		1,000		
460 Non-Consumable Items	2,329	507		1,000		-		
470 Computer Software	3,685	5,024		5,000		12,000		
480 Computer Hardware	2,568	4,154		5,000		-		
640 Dues and Fees	30	-		-		5,000		
690 Grant Indirect Charges	110,815	-		140,000		26,175		
Total Interpretation and Translation Services	2,325,014	2,596,694	28.44	2,960,000	28.40	3,120,000		
Total Support Services	14,434,480	13,847,033	68.28	14,531,841	60.43	15,187,528		
3100 - Food Services								
380 Non-Instructional Professional and Technical Services	59,792	59,528		69,000		79,000		
450 Food	3,663	-		5,000		-		
640 Dues and Fees	-	435		1,000		1,000		
Total Food Services	63,455	59,963	-	75,000	-	80,000		
Total Enterprise and Community Services	63,455	59,963	-	75,000	-	80,000		
5200 - Transfers of Funds								
710 Fund Modifications	-	-		2,500		-		
Total Transfers of Funds	-	-	-	2,500	-	-		
5300 - Apportionment of Funds by ESD								
720 Transits	19,386,155	16,439,074		22,102,824		22,548,273		
Total Apportionment of Funds by ESD	19,386,155	16,439,074	-	22,102,824	-	22,548,273		
Total Other Uses	19,386,155	16,439,074	-	22,105,324	-	22,548,273		
TOTAL REQUIREMENTS	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		

Special Revenue Fund

Requirements by Service Area / Program

	2022-23 Actual	2023-24 Actual	2024-25 Budget		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Programs for Children with Special Needs								
Child Nutrition Programs	63,455	59,963	-	75,000	-	80,000		
Connected Lane County	-	-	-	-	-	-		
Early Intervention / Early Childhood Special Education	18,567,913	15,416,549	0.03	21,000,000	0.03	21,000,000		
IDEA Regional Technical Assistance Program	-	73,272	0.30	75,000	0.30	80,000		
Juvenile Detention Education Program	356,457	272,645	2.30	514,000	2.70	544,000		
Martin Luther King, Jr. Education Center	187,783	219,536	1.80	265,000	1.00	150,000		
Miscellaneous Special Education Grants	50,250	68,016	-	67,000	-	75,000		
Oregon Early Childhood Inclusion Initiative	-	216,141	-	214,000	-	-		
Regional Inclusive Services	1,497,682	1,809,993	10.70	1,750,000	15.65	2,500,000		
School Violence Prevention Program	4,160	249,201	-	110,000	-	-		
Sign Language Interpreter Services	2,325,014	2,596,694	28.45	2,960,000	28.40	3,120,000		
State Hospital Education Program	144,700	150,000	1.05	184,000	1.03	200,000		
Youth Transition Program	657,909	653,243	-	-	-	-		
Total Programs for Children with Special Needs	23,855,323	21,536,050	44.63	27,104,000	49.10	27,749,000		
School Improvement Services								
African American Black Student Success	1,087,585	469,241	-	-	-	-		
Behavioral Health CTE Program	-	-	-	-	-	55,000		
CTE Revitalization: Manufacturing	236,396	46,558	-	-	-	-		
CTE Revitalization: Health Science	212,608	-	-	-	-	-		
Governor's Emergency Education Relief Fund	36,397	243,951	1.50	163,000	-	-		
Grow Your Own: Teacher Pathways	451,257	257,097	1.13	600,000	0.65	465,000		
Health Care Workforce CTE Program	-	-	-	-	-	362,000		
K-8 Data Reasoning & Integration Project	-	38,802	-	-	-	-		
Latinx Student Success	-	-	-	-	-	190,000		
Lane Career Academy: HOPE Factory	-	6,261	2.00	165,000	-	-		
LGBTQ+ Student Success	-	-	-	-	0.40	150,000		
Menstrual Dignity Act	8,460	169	-	20,000	-	10,000		
Miscellaneous School Improvement Grants	159,638	155,129	0.05	125,000	0.05	275,000		
Native Youth Wellness	174,353	318,463	2.00	529,000	2.25	450,000		
Binational Teacher Exchange Program	42,191	1,275	-	45,000	-	60,000		
BOLI Future Ready Oregon: Construction	131,008	132,949	-	-	-	-		
BOLI Future Ready Oregon: Manufacturing	3,399	464,702	-	-	-	-		
Oregon Math Program	575,124	30,000	-	-	0.35	200,000		
PacificSource System of Care Agile Funding	-	55,000	-	-	-	-		
Pathways to Apprenticeship: Computer Science	64,284	-	-	-	-	-		
Perkins	1,070,631	1,059,376	1.20	1,000,000	1.50	1,070,000		
Research for Better Teaching	62,401	39,095	-	60,000	-	95,000		
School Safety and Prevention System Specialist	81,495	47,184	1.00	190,000	1.00	165,000		
Secondary Career Pathways	22,005	8,511	-	-	-	18,000		
STEM Hub: Backbone	199,272	210,361	0.25	360,000	1.50	250,000		
STEM Hub: Computer Science	365,258	76,251	1.50	223,000	-	-		
STEM Hub: Innovation	151,173	28,642	0.25	300,000	0.50	225,000		

Special Revenue Fund

Requirements by Service Area / Program (continued)

	2022-23 Actual	2023-24 Actual	2024-25 Budget		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Student Success Act: ESD Technical Assistance	1,966,408	1,895,727	10.70	2,000,000	7.40	1,910,000		
Team Oregon Build	-	416,568	2.00	1,000,000	-	230,000		
Title I-C: Migrant Education Program	1,565,706	1,411,814	8.00	1,016,000	5.41	925,000		
Title III: Multilingual Language Learners	91,079	90,774	0.23	70,000	0.20	88,000		
Title IV-B: 21st Century Community Learning Centers	-	231,307	-	-	-	425,000		
Western Regional Educator Network	2,852,410	3,036,684	9.00	3,110,000	8.30	2,957,998		
Workforce Ready: Healthcare	-	-	-	-	0.77	875,000		
Youth Reengagement Program	169,542	-	-	-	-	-		
Total School Improvement Services	11,780,080	10,771,890	40.80	10,976,000	30.28	11,450,998		
Technology Support								
Infrastructural Technology Equipment	189,125	745,375	-	275,000	-	355,000		
Total Technology Support	189,125	745,375	-	275,000	-	355,000		
Administrative and Support Services								
Elementary and Secondary School Emergency Relief Fund (ESSER)	1,156,719	295,811	-	-	-	-		
Total Administrative and Support Services	1,156,719	295,811	-	-	-	-		
Excess Appropriations	-	-	-	1,500,000	-	2,000,000		
TOTAL REQUIREMENTS	36,981,247	33,349,126	85.43	39,855,000	79.38	41,554,998		

Debt Service Fund

The Debt Service Fund accounts for the accumulation of resources for, and the payment of, general long-term debt, principal and interest.



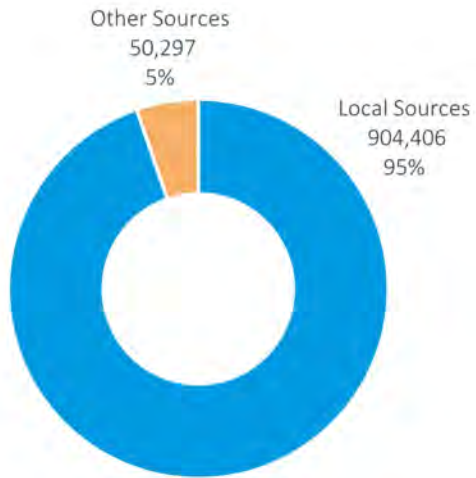
The Lane Career Academy collaboration provides Lane County students with technical education to access high-wage, high-demand jobs. Current programming includes HOPE Factory (construction/manufacturing); future programming to include Emergency Medical Services and Behavioral Health.

Debt Service Fund

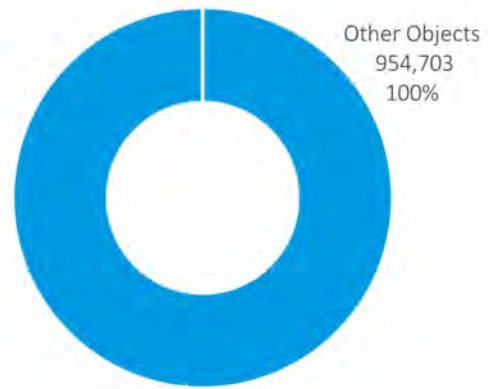
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	837,705	890,341		873,155		904,406		
5000 Other Sources	75,581	58,720		43,700		50,297		
Total Resources	913,285	949,061		916,855		954,703		
Requirements								
600 Other Objects	854,566	885,021		916,855		954,703		
Total Requirements	854,566	885,021		916,855		954,703		
ENDING FUND BALANCE	58,720	64,039		-		-		

Resources



Requirements



Debt Service Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1500 Earnings on Investments	15,265	25,326		18,000		18,000		
1970 Services Provided Other Funds	822,440	865,015		855,155		886,406		
Total Revenue from Local Sources	837,705	890,341		873,155		904,406		
5000 - Revenue from Other Sources								
5400 Beginning Fund Balance	75,581	58,720		43,700		50,297		
Total Revenue from Other Sources	75,581	58,720		43,700		50,297		
TOTAL RESOURCES	913,285	949,061		916,855		954,703		

Debt Service Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
600 - Other Objects								
610 Redemption of Principal	615,000	680,000		750,000		830,000		
621 Regular Interest	239,565	205,021		166,825		124,698		
640 Dues and Fees	1	1		30		5		
Total Other Objects	854,566	885,021		916,855		954,703		
TOTAL REQUIREMENTS	854,566	885,021	-	916,855	-	954,703		

Debt Service Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2000 - Support Services								
2640 Staff Services	1	1		30		5		
Total Support Services	1	1		30		5		
5000 - Other Uses								
5100 Debt Service	854,565	885,021		916,825		954,698		
Total Other Uses	854,565	885,021		916,825		954,698		
TOTAL REQUIREMENTS	854,566	885,021	-	916,855	-	954,703		

Debt Service Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2640 - Staff Services								
640 Dues and Fees	1	1		30		5		
Total Staff Services	1	1		30		5		
Total Support Services	1			30		5		
5100 - Debt Service								
610 Redemption of Principal	615,000	680,000		750,000		830,000		
621 Regular Interest	239,565	205,021		166,825		124,698		
Total Debt Service	854,565	885,021		916,825		954,698		
Total Other Uses	854,565	885,021		916,825		954,698		
TOTAL REQUIREMENTS	854,566	885,021	-	916,855	-	954,703		

Capital Projects Fund

The Capital Projects Fund accounts for financial resources used to acquire or construct major capital facilities.



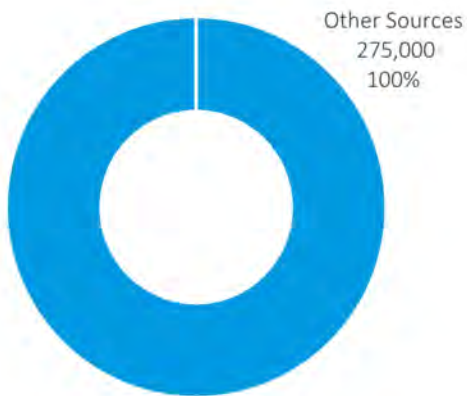
Friends and Fun Camp provided Life Skills students with opportunities to experience swimming, music, art, science, and other social activities specifically tailored to meet their unique needs.

Capital Projects Fund

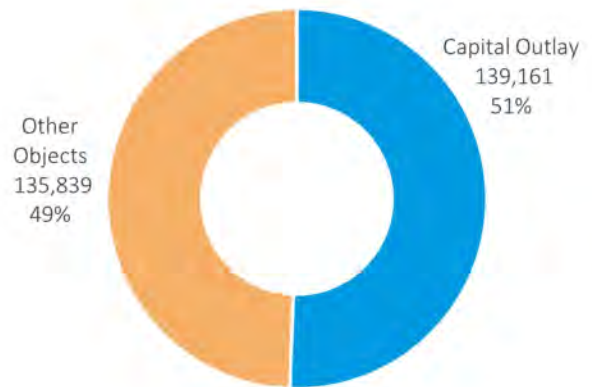
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Resources								
5000 Other Sources	461,073	829,295		285,000		275,000		
Total Resources	461,073	829,295		285,000		275,000		
Requirements								
300 Purchased Services	153,711	54,363		-		-		
400 Supplies and Materials	-	2,478		-		-		
500 Capital Outlay	-	700,947		148,914		139,161		
600 Other Objects	63,067	71,507		136,086		135,839		
Total Requirements	216,778	829,295		285,000		275,000		
ENDING FUND BALANCE	244,295	-		-		-		

Resources



Requirements



Capital Projects Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
5000 - Revenue from Other Sources								
5100 Long-Term Debt Financing Sources	-	300,000		-		-		
5200 Interfund Transfers	299,815	285,000		285,000		275,000		
5400 Beginning Fund Balance	161,258	244,295		-		-		
Total Revenue from Other Sources	461,073	829,295		285,000		275,000		
TOTAL RESOURCES	461,073	829,295		285,000		275,000		

Capital Projects Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
300 - Purchased Services								
320 Property Services	125,338	18,854		-		-		
380 Non-Instructional Professional and Technical Services	28,372	35,509		-		-		
Total Purchased Services	153,711	54,363		-		-		
400 - Supplies and Materials								
460 Non-Consumable Items	-	2,478		148,914		-		
Total Supplies and Materials	-	2,478		148,914		-		
500 - Capital Outlay								
540 Depreciable Equipment	-	5,410		148,914		-		
590 Other Capital Outlay	-	695,537		-		139,161		
Total Capital Outlay	-	700,947		148,914		139,161		
600 - Other Objects								
610 Redemption of Principal	40,682	42,077		98,164		102,384		
621 Regular Interest	22,386	20,990		37,922		33,455		
640 Dues and Fees	-	8,440		-		-		
Total Other Objects	63,067	71,507		136,086		135,839		
TOTAL REQUIREMENTS	216,778	829,295	-	285,000	-	275,000		

Capital Projects Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2000 - Support Services								
2540 Operation and Maintenance of Plant Services	153,711	766,228		148,914		139,161		
Total Support Services	153,711	766,228		148,914		139,161		
5000 - Other Uses								
5100 Debt Service	63,067	63,067		136,086		135,839		
Total Other Uses	63,067	63,067		136,086		135,839		
TOTAL REQUIREMENTS	216,778	829,295		285,000		275,000		

Capital Projects Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2540 - Operation and Maintenance of Plant Services								
320 Property Services	125,338	18,854		-		-		
380 Non-Instructional Professional and Technical Services	28,372	35,509		-		-		
460 Non-Consumable Items	-	2,478		-		-		
540 Depreciable Equipment	-	5,410		148,914		-		
590 Other Capital Outlay	-	695,537		-		139,161		
640 Dues and Fees	-	8,440		-		-		
Total Operation and Maintenance of Plant Services	153,711	766,228		148,914		139,161		
Total Support Services	153,711	766,228		148,914		139,161		
5100 - Debt Service								
610 Redemption of Principal	40,682	42,077		98,164		102,384		
621 Regular Interest	22,386	20,990		37,922		33,455		
Total Debt Service	63,067	63,067		136,086		135,839		
Total Other Uses	63,067	63,067		136,086		135,839		
TOTAL REQUIREMENTS	216,778	829,295	-	285,000	-	275,000		

Internal Service Fund

The Internal Service Fund accounts for the operation of district functions that provide goods or services to other district functions, other districts, or to other governmental units, on a cost-reimbursable basis. This includes the Equipment Replacement Fund and the Technology Replacement Fund.



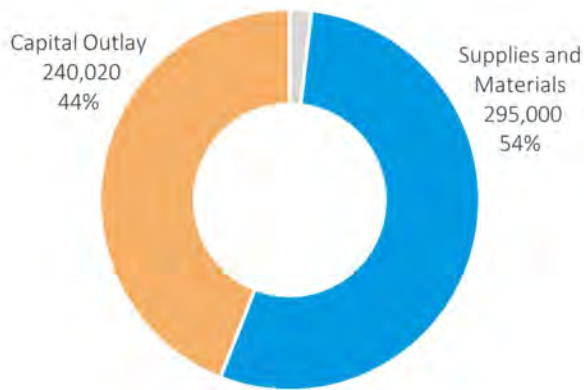
MedSplash is an annual summer camp for health sciences that provides students with hands-on experience with medical equipment while learning about high wage and in-demand health careers and exploring health pathways at Lane Community College.

Internal Service Fund

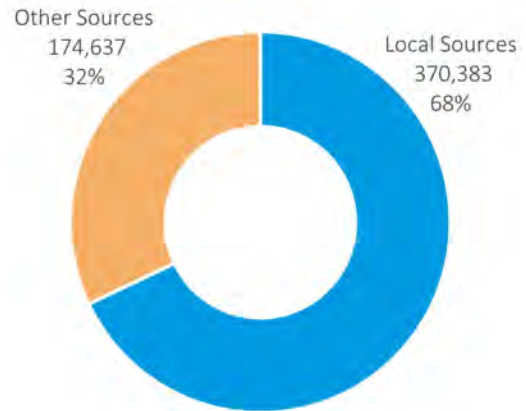
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	294,659	278,832		252,600		370,383		
5000 Other Sources	484,071	418,074		182,426		174,637		
Total Resources	778,730	696,906		435,026		545,020		
Requirements								
300 Purchased Services	-	7,658		-		10,000		
400 Supplies and Materials	195,815	153,508		270,000		295,000		
500 Capital Outlay	164,841	401,270		165,026		240,020		
Total Requirements	360,656	562,436		435,026		545,020		
ENDING FUND BALANCE	418,074	134,470		-		-		

Resources



Requirements



Internal Service Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1960 Recovery of Prior Years' Expenditure	-	-		-		107,783		
1970 Services Provided Other Funds	294,659	278,832		252,600		262,600		
Total Revenue from State Sources	294,659	278,832		252,600		370,383		
5000 - Revenue from Other Sources								
5300 Sale of/or Compensation for Loss of Fixed Assets	4,092	-		-		-		
5400 Beginning Fund Balance	479,979	418,074		182,426		174,637		
Total Revenue from Other Sources	484,071	418,074		182,426		174,637		
TOTAL RESOURCES	778,730	696,906		435,026		545,020		

Internal Service Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
300 - Purchased Services								
380 Non-Instructional Professional and Technical Services	-	7,658		-		10,000		
Total Purchased Services		7,658				10,000		
400 - Supplies and Materials								
460 Non-Consumable Items	918	595		10,000		-		
470 Computer Software	828	-		10,000		-		
480 Computer Hardware	194,068	152,913		250,000		295,000		
Total Supplies and Materials	195,815	153,508		270,000		295,000		
500 - Capital Outlay								
540 Depreciable Equipment	164,841	176,879		165,026		200,020		
590 Other Capital Outlay	-	224,391		-		40,000		
Total Capital Outlay	164,841	401,270		165,026		240,020		
TOTAL REQUIREMENTS	360,656	562,436		435,026		545,020		

Internal Service Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2000 - Support Services								
2540 Operation and Maintenance of Plant Services	120,686	397,249		165,026		250,020		
2570 Internal Services	44,155	-		-		-		
2660 Technology Services	195,815	153,508		270,000		295,000		
2690 Other Support Services - Central	-	11,679		-		-		
Total Support Services	360,656	562,436		435,026		545,020		
TOTAL REQUIREMENTS	360,656	562,436		435,026		545,020		

Internal Service Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2540 - Operation and Maintenance of Plant Services								
380 Non-Instructional Professional and Technical Services	-	7,658		-		10,000		
540 Depreciable Equipment	120,686	165,200		165,026		200,020		
590 Other Capital Outlay	-	224,391		-		40,000		
Total Operation and Maintenance of Plant Services	120,686	397,249		165,026		250,020		
2570 - Internal Services								
540 Depreciable Equipment	44,155	-		-		-		
Total Internal Services	44,155	-		-		-		
2660 - Technology Services								
460 Non-Consumable Items	918	595		10,000		-		
470 Computer Software	828	-		10,000		-		
480 Computer Hardware	194,068	152,913		250,000		295,000		
Total Technology Services	195,815	153,508		270,000		295,000		
2690 - Other Support Services - Central								
540 Depreciable Equipment	-	11,679		-		-		
Total Other Support Services - Central	-	11,679		-		-		
Total Support Services	360,656	562,436		435,026		545,020		
TOTAL REQUIREMENTS	360,656	562,436		435,026		545,020		

Other Information



Friends and Fun Camp provided Life Skills students with opportunities to experience swimming, music, art, science, and other social activities specifically tailored to meet their unique needs.

Summary of Staffing (FTE)

	2024-25 Budget			2025-26 Proposed		
	100	200	All	100	200	All
	General Fund	Special Revenue Fund	Total	General Fund	Special Revenue Fund	Total
Licensed Staff						
111 Classroom Teacher	29.00	5.00	34.00	31.00	4.00	35.00
111 Special Education Consultant or Specialist	11.13	10.40	21.53	7.60	14.10	21.70
111 Speech Language Pathologist	8.20	-	8.20	15.30	0.50	15.80
111 School Psychologist	0.63	-	0.63	2.80	-	2.80
111 School Improvement Specialist	2.00	16.83	18.83	4.00	11.50	15.50
111 School Counselor	-	-	-	0.50	0.50	1.00
111 School Nurse	0.63	-	0.63	2.80	-	2.80
Total Licensed Staff	51.58	32.23	83.81	64.00	30.60	94.60
Classified Staff						
112 Instructional Assistant	118.94	-	118.94	116.69	-	116.69
112 Custodian	1.50	-	1.50	1.50	-	1.50
112 Courier Driver	1.00	-	1.00	0.80	-	0.80
112 Maintenance Technician	1.00	-	1.00	1.00	-	1.00
112 Program Assistant	3.60	5.28	8.88	4.00	3.35	7.35
112 Desktop Support Technician	-	1.00	1.00	1.00	-	1.00
112 Human Resources Specialist	1.00	-	1.00	2.00	-	2.00
112 Accounting Specialist	2.00	-	2.00	2.00	-	2.00
112 Program Facilitator, Navigator or Coordinator	-	13.00	13.00	-	12.73	12.73
112 Early Childhood Parent Educator	-	1.00	1.00	-	1.00	1.00
112 Systems Administrator	2.00	-	2.00	2.00	-	2.00
112 Database Administrator	1.00	-	1.00	1.00	-	1.00
112 Systems Engineer	2.00	-	2.00	2.00	-	2.00
112 Cybersecurity Engineer	1.00	-	1.00	1.00	-	1.00
112 Interpreter	-	26.94	26.94	-	27.00	27.00
Total Classified Staff	135.04	47.22	182.26	134.99	44.08	179.06
Administrative Staff						
113 Facilities Manager	1.00	-	1.00	1.00	-	1.00
113 Program Administrator	5.27	4.03	9.30	3.60	2.40	6.00
113 Assistant Director	-	-	-	-	1.00	1.00
113 Executive Director	4.58	1.42	6.00	4.80	1.20	6.00
113 Assistant Superintendent	1.00	-	1.00	1.00	-	1.00
113 Superintendent	1.00	-	1.00	1.00	-	1.00
Total Administrative Staff	12.85	5.45	18.30	11.40	4.60	16.00
Managerial - Classified Staff						
114 Payroll Specialist	1.00	-	1.00	1.00	-	1.00
114 Office Manager	2.48	0.53	3.00	1.90	0.10	2.00
114 Human Resources Analyst	2.00	-	2.00	1.00	-	1.00
114 Executive Assistant	1.00	-	1.00	1.00	-	1.00
Total Managerial - Classified Staff	6.48	0.53	7.00	4.90	0.10	5.00
GRAND TOTAL	205.95	85.43	291.37	215.29	79.38	294.66

Service Orders

Summary

District	2024-25 ADMr	2024-25 Carryover	PD Carryover	High Cost Pool	2025-26 Allocation	2025-26 Available	Transit Cash	Total Services	Amount Due	Flex \$ Balance
Bethel	4,943.72	109,063	47,600	-	2,657,600	2,814,263	1,407,132	2,702,149	-	112,115
Blachly	402.79	-	5,502	-	221,900	227,402	-	256,718	(29,316)	-
Creswell	1,084.95	-	28,338	8,800	566,300	603,438	-	1,243,748	(640,310)	-
Crow-Applegate-Lorane	293.64	-	-	-	187,800	187,800	32,884	187,800	-	-
Eugene	15,687.49	-	315,601	-	8,049,950	8,365,551	1,541,823	8,365,551	-	-
Fern Ridge	1,390.10	-	4,628	-	717,600	722,228	150,743	722,228	-	-
Junction City	1,550.14	-	15,515	-	803,900	819,415	-	1,470,608	(651,193)	-
Lowell	1,044.35	284,618	33,200	-	558,500	876,318	438,159	607,910	-	268,408
Mapleton	136.59	-	3,400	-	124,400	127,800	46,843	127,800	-	-
Marcola	942.94	-	-	-	501,700	501,700	-	499,467	-	2,233
McKenzie	196.96	-	5,683	3,800	157,500	166,983	-	376,041	(209,058)	-
Oakridge	501.46	-	9,253	23,400	296,300	328,953	-	367,124	(38,171)	-
Pleasant Hill	932.36	-	27,806	-	483,800	511,606	112,422	511,606	-	-
Siuslaw	1,188.18	-	8,589	64,000	613,800	686,389	-	357,400	-	328,989
South Lane	2,635.87	266,587	13,668	-	1,456,400	1,736,655	280,888	1,736,655	-	-
Springfield	8,991.37	-	55,258	-	4,804,200	4,859,458	-	6,719,460	(1,860,002)	-
Charter Schools								13,300	(13,300)	-
Totals	41,922.91	660,268	574,041	100,000	22,201,650	23,535,959	4,010,894	26,265,564	(3,441,349)	711,745

Comparison

Life Skills Placements		Lane School Placements		Behavior Consultants		School Psychologists		Speech Language Pathologists		Augmentative Communication		Direction Service		Learn360		Career and Technical Ed		Library Services		Substitute Teacher List		Courier Services	
24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26
3	1	7	5	0.00	0.00	0.00	0.00	0.00	0.00	4	1	Y	Y	Y	Y	10	10	Y	Y	Y	Y	Y	Y
0	0	1	1	0.00	0.20	0.13	0.13	0.60	0.60	0	0	Y	Y	Y	N	1	2	Y	Y	Y	Y	Y	N
12	12	5	4	0.00	0.00	0.00	0.00	0.00	0.00	20	18	Y	Y	N	N	7	7	Y	Y	Y	Y	Y	Y
0	0	0	0	0.00	0.00	0.38	0.38	0.40	0.40	0	0	Y	N	Y	N	3	3	Y	Y	Y	N	N	N
68	63	10	4	0.00	0.00	0.00	0.00	0.00	0.00	1	1	Y	Y	N	N	25	22	N	N	N	N	Y	Y
8	6	1	1	0.00	0.00	0.00	0.00	0.00	0.00	5	5	Y	Y	Y	Y	3	3	Y	Y	Y	Y	Y	Y
7	3	5	5	0.60	0.60	0.00	0.00	0.70	2.00	7	8	Y	Y	N	N	5	6	Y	Y	N	N	Y	Y
2	2	0	0	0.00	0.00	0.00	0.00	0.00	0.00	2	0	Y	Y	N	N	2	2	Y	Y	Y	Y	Y	Y
0	0	0	0	0.00	0.00	0.00	0.00	0.50	0.50	0	0	Y	Y	Y	N	1	1	Y	Y	Y	N	N	N
2	2	1	0	0.10	0.10	0.00	0.70	0.50	1.00	1	1	Y	Y	Y	Y	4	3	Y	Y	Y	Y	N	N
0	0	0	0	0.00	0.00	0.13	0.13	0.50	0.50	1	1	Y	Y	N	N	4	4	Y	Y	Y	Y	Y	Y
0	0	1	1	0.00	0.00	0.38	0.38	1.00	1.00	5	5	Y	Y	Y	Y	5	6	Y	Y	Y	Y	Y	Y
3	3	2	2	0.00	0.00	0.00	0.10	0.00	0.00	5	4	Y	Y	N	N	2	2	Y	Y	Y	Y	N	N
0	0	0	0	0.00	0.00	1.00	1.00	1.00	1.00	5	0	Y	N	N	N	8	8	N	N	N	N	Y	Y
12	13	5	6	0.00	0.00	0.00	0.00	0.00	0.00	22	20	Y	Y	N	N	11	11	N	N	Y	N	Y	Y
87	81	6	4	0.00	0.00	0.00	0.00	0.00	0.00	0	0	Y	Y	Y	Y	23	21	N	N	N	N	Y	Y
205	186	44	33	0.70	0.90	2.00	2.80	4.70	7.00	78	64	16	14	8	5	114	111	12	12	12	9	12	11

Service Orders

District Service Orders

Lane Education Service District 2025-26 Service Order Form

District:	Bethel	ADMr:	4,943.72
Total Flex Dollars Available			\$ 2,814,263
2025-26 Flex Allocation			\$ 2,657,600
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ 109,063
2024-25 Professional Development Carryover (estimate)			\$ 47,600
Menu Services		Unit	Order
			Cost
			\$ 1,295,017
Life Skills Consortium Placements			1 \$ 73,000 \$ 73,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	1	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		5	\$ 65,500 \$ 327,500
Lane School: Grades K-2	1	Students	\$ -
Lane School: Grades 3-5	1	Students	\$ -
Lane School: Grades 6-8	3	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	0.00	\$ 155,000 \$ -
Augmentative Communication	Students	1	\$ 4,000 \$ 4,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 10,629
Sign Language Interpretation Services	Dollars	\$ 800,000	\$ 800,000 \$ 800,000
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	Yes	\$ 0.80 \$ 3,955
Career and Technical Education	Programs	10	\$ 1,900 \$ 19,000
Library Services	ADMr	Yes	\$ 9.25 \$ 45,729
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81 \$ 4,004
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 1,407,132
Total Cost of Services Ordered			\$ 2,702,149
		Flex Dollar Balance (Amount Due)	\$ 112,114

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Blachly		ADMr:	402.79	
Total Flex Dollars Available					
2025-26 Flex Allocation					\$ 227,402
2025-26 High Cost Pool (estimate)					\$ -
2024-25 Flex Carryover (estimate)					\$ -
2024-25 Professional Development Carryover (estimate)					\$ 5,502
Menu Services					
	Unit	Order	Cost	\$ 256,718	
Life Skills Consortium Placements		0	\$ 73,000	\$ -	
Life Skills : Grades K-5	0	Students			
Life Skills : Grades 6-8	0	Students			
Life Skills : Grades 9-12	0	Students			
Life Skills : Transitions	0	Students			
Life Skills: Medically Fragile		0	\$ 145,000	\$ -	
Lane School Placements		1	\$ 65,500	\$ 65,500	
Lane School: Grades K-2	0	Students		\$ -	
Lane School: Grades 3-5	1	Students		\$ -	
Lane School: Grades 6-8	0	Students		\$ -	
Behavior Disorder Consultants	FTE	0.20	\$ 165,000	\$ 33,000	
School Psychologists	FTE	0.13	\$ 180,000	\$ 22,500	
Speech Language Pathologists	FTE	0.60	\$ 155,000	\$ 93,000	
Augmentative Communication	Students	0	\$ 4,000	\$ -	
Direction Service	ADMr	Yes	\$ 2.15	\$ 866	
Sign Language Interpretation Services	Dollars	\$ -	\$ -	\$ -	
MLK Jr. Education Center	Dollars	\$ -	\$ -	\$ -	
Nursing Services	FTE	0.20	\$ 170,000	\$ 34,000	
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80	\$ -	
Career and Technical Education	Programs	2	\$ 1,900	\$ 3,800	
Library Services	ADMr	Yes	\$ 9.25	\$ 3,726	
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81	\$ 326	
Courier Services	District	No	\$ 7,200	\$ -	
Custom Services					\$ -
Request #1				\$ -	
Request #2				\$ -	
Request #3				\$ -	
Transit Dollars					\$ -
Total Cost of Services Ordered					\$ 256,718
Flex Dollar Balance (Amount Due)					\$ (29,316)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Creswell	ADMr:	1,084.95
Total Flex Dollars Available			\$ 603,438
2025-26 Flex Allocation			\$ 566,300
2025-26 High Cost Pool (estimate)			\$ 8,800
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 28,338
Menu Services	Unit	Order	Cost \$ 1,243,748
Life Skills Consortium Placements		12	\$ 73,000 \$ 876,000
Life Skills : Grades K-5	7	Students	
Life Skills : Grades 6-8	3	Students	
Life Skills : Grades 9-12	2	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		4	\$ 65,500 \$ 262,000
Lane School: Grades K-2	2	Students	\$ -
Lane School: Grades 3-5	2	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	0.00	\$ 155,000 \$ -
Augmentative Communication	Students	18	\$ 4,000 \$ 72,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 2,333
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	7	\$ 1,900 \$ 13,300
Library Services	ADMr	Yes	\$ 9.25 \$ 10,036
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81 \$ 879
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 1,243,748
		Flex Dollar Balance (Amount Due)	\$ (640,310)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Crow-Applegate-Lorane		ADMr:	293.64	
Total Flex Dollars Available				\$	187,800
2025-26 Flex Allocation				\$	187,800
2025-26 High Cost Pool (estimate)				\$	-
2024-25 Flex Carryover (estimate)				\$	-
2024-25 Professional Development Carryover (estimate)				\$	-
Menu Services			Unit	Order	Cost
					\$ 154,916
Life Skills Consortium Placements				0	\$ 73,000 \$ -
Life Skills : Grades K-5			0	Students	
Life Skills : Grades 6-8			0	Students	
Life Skills : Grades 9-12			0	Students	
Life Skills : Transitions			0	Students	
Life Skills: Medically Fragile			0		\$ 145,000 \$ -
Lane School Placements			0		\$ 65,500 \$ -
Lane School: Grades K-2			0	Students	\$ -
Lane School: Grades 3-5			0	Students	\$ -
Lane School: Grades 6-8			0	Students	\$ -
Behavior Disorder Consultants			FTE	0.00	\$ 165,000 \$ -
School Psychologists			FTE	0.38	\$ 180,000 \$ 67,500
Speech Language Pathologists			FTE	0.40	\$ 155,000 \$ 62,000
Augmentative Communication			Students	0	\$ 4,000 \$ -
Direction Service			ADMr	No	\$ 2.15 \$ -
Sign Language Interpretation Services			Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center			Dollars	\$ -	\$ - \$ -
Nursing Services			FTE	0.10	\$ 170,000 \$ 17,000
Application Hosting and Management: Learn360			ADMr	No	\$ 0.80 \$ -
Career and Technical Education			Programs	3	\$ 1,900 \$ 5,700
Library Services			ADMr	Yes	\$ 9.25 \$ 2,716
Substitute Teacher List Subscription			ADMr	No	\$ 0.81 \$ -
Courier Services			District	No	\$ 7,200 \$ -
Custom Services					\$ -
Request #1					\$ -
Request #2					\$ -
Request #3					\$ -
Transit Dollars					\$ 32,884
Total Cost of Services Ordered					\$ 187,800
Flex Dollar Balance (Amount Due)					\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Eugene	ADMr:	15,687.49
Total Flex Dollars Available		\$ 8,365,551	
2025-26 Flex Allocation		\$ 8,049,950	
2025-26 High Cost Pool (estimate)		\$ -	
2024-25 Flex Carryover (estimate)		\$ -	
2024-25 Professional Development Carryover (estimate)		\$ 315,601	
Menu Services		Unit	Order Cost \$ 6,823,728
Life Skills Consortium Placements			55 \$ 73,000 \$ 4,015,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	22	Students	
Life Skills : Grades 9-12	25	Students	
Life Skills : Transitions	8	Students	
Life Skills: Medically Fragile			8 \$ 145,000 \$ 1,160,000
Lane School Placements			4 \$ 65,500 \$ 262,000
Lane School: Grades K-2	1	Students	\$ -
Lane School: Grades 3-5	1	Students	\$ -
Lane School: Grades 6-8	2	Students	\$ -
Behavior Disorder Consultants	FTE		0.00 \$ 165,000 \$ -
School Psychologists	FTE		0.00 \$ 180,000 \$ -
Speech Language Pathologists	FTE		0.00 \$ 155,000 \$ -
Augmentative Communication	Students		1 \$ 4,000 \$ 4,000
Direction Service	ADMr		Yes \$ 2.15 \$ 33,728
Sign Language Interpretation Services	Dollars		\$ 1,300,000 \$ 1,300,000 \$ 1,300,000
MLK Jr. Education Center	Dollars		\$ - \$ - \$ -
Nursing Services	FTE		0.00 \$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr		No \$ 0.80 \$ -
Career and Technical Education	Programs		22 \$ 1,900 \$ 41,800
Library Services	ADMr		No \$ 9.25 \$ -
Substitute Teacher List Subscription	ADMr		No \$ 0.81 \$ -
Courier Services	District		Yes \$ 7,200 \$ 7,200
Custom Services		\$ -	
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars		\$ 1,541,823	
Total Cost of Services Ordered		\$ 8,365,551	
Flex Dollar Balance (Amount Due)		\$ -	

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Fern Ridge	ADMr:	1,390.10
Total Flex Dollars Available			\$ 722,228
2025-26 Flex Allocation			\$ 717,600
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 4,628
Menu Services		Unit	Order
		Cost	\$ 571,485
Life Skills Consortium Placements			6 \$ 73,000 \$ 438,000
Life Skills : Grades K-5	1	Students	
Life Skills : Grades 6-8	3	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	2	Students	
Life Skills: Medically Fragile			0 \$ 145,000 \$ -
Lane School Placements			1 \$ 65,500 \$ 65,500
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	1	Students	\$ -
Behavior Disorder Consultants	FTE		0.00 \$ 165,000 \$ -
School Psychologists	FTE		0.00 \$ 180,000 \$ -
Speech Language Pathologists	FTE		0.00 \$ 155,000 \$ -
Augmentative Communication	Students		5 \$ 4,000 \$ 20,000
Direction Service	ADMr		Yes \$ 2.15 \$ 2,989
Sign Language Interpretation Services	Dollars		\$ - \$ - \$ -
MLK Jr. Education Center	Dollars		\$ - \$ - \$ -
Nursing Services	FTE		0.10 \$ 170,000 \$ 17,000
Application Hosting and Management: Learn360	ADMr		Yes \$ 0.80 \$ 1,112
Career and Technical Education	Programs		3 \$ 1,900 \$ 5,700
Library Services	ADMr		Yes \$ 9.25 \$ 12,858
Substitute Teacher List Subscription	ADMr		Yes \$ 0.81 \$ 1,126
Courier Services	District		Yes \$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 150,743
Total Cost of Services Ordered			\$ 722,228
Flex Dollar Balance (Amount Due)			\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Junction City	ADMr:	1,550.14
Total Flex Dollars Available			\$ 819,415
2025-26 Flex Allocation			\$ 803,900
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 15,515
Menu Services		Unit	Order
		Cost	\$ 1,215,772
Life Skills Consortium Placements		2	\$ 73,000 \$ 146,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	1	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	1	Students	
Life Skills: Medically Fragile		1	\$ 145,000 \$ 145,000
Lane School Placements		5	\$ 65,500 \$ 327,500
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	2	Students	\$ -
Lane School: Grades 6-8	3	Students	\$ -
Behavior Disorder Consultants	FTE	0.60	\$ 165,000 \$ 99,000
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	2.00	\$ 155,000 \$ 310,000
Augmentative Communication	Students	8	\$ 4,000 \$ 32,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 3,333
Sign Language Interpretation Services	Dollars	\$ 120,000	\$ 120,000 \$ 120,000
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	6	\$ 1,900 \$ 11,400
Library Services	ADMr	Yes	\$ 9.25 \$ 14,339
Substitute Teacher List Subscription	ADMr	No	\$ 0.81 \$ -
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ 254,836
Request #1	SANDI (30 students)		\$ -
Request #2	ISP for 1 student		\$ 254,836
Request #3	Inclusion/Life Skills consultation (.1 FTE?)		\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 1,470,608
		Flex Dollar Balance (Amount Due)	\$ (651,193)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Lowell	ADMr:	1,044.35
Total Flex Dollars Available			\$ 876,318
2025-26 Flex Allocation			\$ 558,500
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ 284,618
2024-25 Professional Development Carryover (estimate)			\$ 33,200
Menu Services		Unit	Order
			Cost
			\$ 169,751
Life Skills Consortium Placements		2	\$ 73,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	2	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000
Lane School Placements		0	\$ 65,500
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000
School Psychologists	FTE	0.00	\$ 180,000
Speech Language Pathologists	FTE	0.00	\$ 155,000
Augmentative Communication	Students	0	\$ 4,000
Direction Service	ADMr	Yes	\$ 2.15
Sign Language Interpretation Services	Dollars	\$ -	\$ -
MLK Jr. Education Center	Dollars	\$ -	\$ -
Nursing Services	FTE	0.00	\$ 170,000
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80
Career and Technical Education	Programs	2	\$ 1,900
Library Services	ADMr	Yes	\$ 9.25
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81
Courier Services	District	Yes	\$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 438,159
Total Cost of Services Ordered			\$ 607,910
		Flex Dollar Balance (Amount Due)	\$ 268,408

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Mapleton			ADMr:	136.59	
Total Flex Dollars Available					\$ 127,800	
2025-26 Flex Allocation					\$	124,400
2025-26 High Cost Pool (estimate)					\$	-
2024-25 Flex Carryover (estimate)					\$	-
2024-25 Professional Development Carryover (estimate)					\$	3,400
Menu Services				Unit	Order	Cost \$ 80,957
Life Skills Consortium Placements					0	\$ 73,000 \$ -
Life Skills : Grades K-5		0	Students			
Life Skills : Grades 6-8		0	Students			
Life Skills : Grades 9-12		0	Students			
Life Skills : Transitions		0	Students			
Life Skills: Medically Fragile				0	\$ 145,000	\$ -
Lane School Placements				0	\$ 65,500	\$ -
Lane School: Grades K-2		0	Students		\$ -	\$ -
Lane School: Grades 3-5		0	Students		\$ -	\$ -
Lane School: Grades 6-8		0	Students		\$ -	\$ -
Behavior Disorder Consultants			FTE	0.00	\$ 165,000	\$ -
School Psychologists			FTE	0.00	\$ 180,000	\$ -
Speech Language Pathologists			FTE	0.50	\$ 155,000	\$ 77,500
Augmentative Communication			Students	0	\$ 4,000	\$ -
Direction Service			ADMr	Yes	\$ 2.15	\$ 294
Sign Language Interpretation Services			Dollars	\$ -	\$ -	\$ -
MLK Jr. Education Center			Dollars	\$ -	\$ -	\$ -
Nursing Services			FTE	0.00	\$ 170,000	\$ -
Application Hosting and Management: Learn360			ADMr	No	\$ 0.80	\$ -
Career and Technical Education			Programs	1	\$ 1,900	\$ 1,900
Library Services			ADMr	Yes	\$ 9.25	\$ 1,263
Substitute Teacher List Subscription			ADMr	No	\$ 0.81	\$ -
Courier Services			District	No	\$ 7,200	\$ -
Custom Services						\$ -
Request #1						\$ -
Request #2						\$ -
Request #3						\$ -
Transit Dollars						\$ 46,843
Total Cost of Services Ordered						\$ 127,800
Flex Dollar Balance (Amount Due)						\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Marcola			ADMr:	942.94
Total Flex Dollars Available					\$ 501,700
2025-26 Flex Allocation					\$ 501,700
2025-26 High Cost Pool (estimate)					\$ -
2024-25 Flex Carryover (estimate)					\$ -
2024-25 Professional Development Carryover (estimate)					\$ -
Menu Services					\$ 499,467
Life Skills Consortium Placements					2 \$ 73,000 \$ 146,000
Life Skills : Grades K-5	0	Students			
Life Skills : Grades 6-8	1	Students			
Life Skills : Grades 9-12	1	Students			
Life Skills : Transitions	0	Students			
Life Skills: Medically Fragile			0	\$ 145,000	\$ -
Lane School Placements			0	\$ 65,500	\$ -
Lane School: Grades K-2	0	Students		\$ -	\$ -
Lane School: Grades 3-5	0	Students		\$ -	\$ -
Lane School: Grades 6-8	0	Students		\$ -	\$ -
Behavior Disorder Consultants	FTE		0.10	\$ 165,000	\$ 16,500
School Psychologists	FTE		0.70	\$ 180,000	\$ 126,000
Speech Language Pathologists	FTE		1.00	\$ 155,000	\$ 155,000
Augmentative Communication	Students		1	\$ 4,000	\$ 4,000
Direction Service	ADMr		Yes	\$ 2.15	\$ 2,027
Sign Language Interpretation Services	Dollars		\$ -	\$ -	\$ -
MLK Jr. Education Center	Dollars		\$ -	\$ -	\$ -
Nursing Services	FTE		0.20	\$ 170,000	\$ 34,000
Application Hosting and Management: Learn360	ADMr		Yes	\$ 0.80	\$ 754
Career and Technical Education	Programs		3	\$ 1,900	\$ 5,700
Library Services	ADMr		Yes	\$ 9.25	\$ 8,722
Substitute Teacher List Subscription	ADMr		Yes	\$ 0.81	\$ 764
Courier Services	District		No	\$ 7,200	\$ -
Custom Services					\$ -
Request #1	Teacher of Record, .5			\$ -	\$ -
Request #2	Assistive Tech, .2			\$ -	\$ -
Request #3				\$ -	\$ -
Transit Dollars					\$ -
Total Cost of Services Ordered					\$ 499,467
Flex Dollar Balance (Amount Due)					\$ 2,233

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	McKenzie	ADMr:	196.96
Total Flex Dollars Available			\$ 166,983
2025-26 Flex Allocation			\$ 157,500
2025-26 High Cost Pool (estimate)			\$ 3,800
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 5,683
Menu Services		Unit	Order
		Cost	\$ 121,205
Life Skills Consortium Placements			0 \$ 73,000 \$ -
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		0	\$ 65,500 \$ -
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.13	\$ 180,000 \$ 22,500
Speech Language Pathologists	FTE	0.50	\$ 155,000 \$ 77,500
Augmentative Communication	Students	1	\$ 4,000 \$ 4,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 423
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	4	\$ 1,900 \$ 7,600
Library Services	ADMr	Yes	\$ 9.25 \$ 1,822
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81 \$ 160
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ 254,836
Request #1	Intensive services Prog. one student- Fox Hollow		\$ 254,836
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 376,041
		Flex Dollar Balance (Amount Due)	\$ (209,058)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Oakridge	ADMr:	501.46
Total Flex Dollars Available			\$ 328,953
2025-26 Flex Allocation			\$ 296,300
2025-26 High Cost Pool (estimate)			\$ 23,400
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 9,253
Menu Services		Unit	Order
		Cost	\$ 367,124
Life Skills Consortium Placements			0 \$ 73,000 \$ -
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile			0 \$ 145,000 \$ -
Lane School Placements			1 \$ 65,500 \$ 65,500
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	1	Students	\$ -
Behavior Disorder Consultants	FTE		0.00 \$ 165,000 \$ -
School Psychologists	FTE		0.38 \$ 180,000 \$ 67,500
Speech Language Pathologists	FTE		1.00 \$ 155,000 \$ 155,000
Augmentative Communication	Students		5 \$ 4,000 \$ 20,000
Direction Service	ADMr		Yes \$ 2.15 \$ 1,078
Sign Language Interpretation Services	Dollars		\$ - \$ - \$ -
MLK Jr. Education Center	Dollars		\$ - \$ - \$ -
Nursing Services	FTE		0.20 \$ 170,000 \$ 34,000
Application Hosting and Management: Learn360	ADMr		Yes \$ 0.80 \$ 401
Career and Technical Education	Programs		6 \$ 1,900 \$ 11,400
Library Services	ADMr		Yes \$ 9.25 \$ 4,639
Substitute Teacher List Subscription	ADMr		Yes \$ 0.81 \$ 406
Courier Services	District		Yes \$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 367,124
Flex Dollar Balance (Amount Due)			\$ (38,171)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Pleasant Hill			ADMr:	932.36	
Total Flex Dollars Available					\$ 511,606	
2025-26 Flex Allocation					\$	483,800
2025-26 High Cost Pool (estimate)					\$	-
2024-25 Flex Carryover (estimate)					\$	-
2024-25 Professional Development Carryover (estimate)					\$	27,806
Menu Services				Unit	Order	Cost
						\$ 399,184
Life Skills Consortium Placements					3	\$ 73,000 \$ 219,000
Life Skills : Grades K-5				0	Students	
Life Skills : Grades 6-8				0	Students	
Life Skills : Grades 9-12				1	Students	
Life Skills : Transitions				2	Students	
Life Skills: Medically Fragile				0		\$ 145,000 \$ -
Lane School Placements					2	\$ 65,500 \$ 131,000
Lane School: Grades K-2				0	Students	\$ -
Lane School: Grades 3-5				1	Students	\$ -
Lane School: Grades 6-8				1	Students	\$ -
Behavior Disorder Consultants				FTE	0.00	\$ 165,000 \$ -
School Psychologists				FTE	0.10	\$ 180,000 \$ 18,000
Speech Language Pathologists				FTE	0.00	\$ 155,000 \$ -
Augmentative Communication				Students	4	\$ 4,000 \$ 16,000
Direction Service				ADMr	Yes	\$ 2.15 \$ 2,005
Sign Language Interpretation Services				Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center				Dollars	\$ -	\$ - \$ -
Nursing Services				FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360				ADMr	No	\$ 0.80 \$ -
Career and Technical Education				Programs	2	\$ 1,900 \$ 3,800
Library Services				ADMr	Yes	\$ 9.25 \$ 8,624
Substitute Teacher List Subscription				ADMr	Yes	\$ 0.81 \$ 755
Courier Services				District	No	\$ 7,200 \$ -
Custom Services						\$ -
Request #1						\$ -
Request #2						\$ -
Request #3						\$ -
Transit Dollars						\$ 112,422
Total Cost of Services Ordered						\$ 511,606
Flex Dollar Balance (Amount Due)						\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Siuslaw	ADMr:	1,188.18
Total Flex Dollars Available			\$ 686,389
2025-26 Flex Allocation			\$ 613,800
2025-26 High Cost Pool (estimate)			\$ 64,000
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 8,589
Menu Services		Unit	Order
		Cost	\$ 357,400
Life Skills Consortium Placements			0 \$ 73,000 \$ -
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		0	\$ 65,500 \$ -
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	1.00	\$ 180,000 \$ 180,000
Speech Language Pathologists	FTE	1.00	\$ 155,000 \$ 155,000
Augmentative Communication	Students	0	\$ 4,000 \$ -
Direction Service	ADMr	No	\$ 2.15 \$ -
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	8	\$ 1,900 \$ 15,200
Library Services	ADMr	No	\$ 9.25 \$ -
Substitute Teacher List Subscription	ADMr	No	\$ 0.81 \$ -
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 357,400
		Flex Dollar Balance (Amount Due)	\$ 328,989

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	South Lane	ADMr:	2,635.87
Total Flex Dollars Available			\$ 1,736,655
2025-26 Flex Allocation			\$ 1,456,400
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ 266,587
2024-25 Professional Development Carryover (estimate)			\$ 13,668
Menu Services	Unit	Order	Cost \$ 1,455,767
Life Skills Consortium Placements		13	\$ 73,000 \$ 949,000
Life Skills : Grades K-5	9	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	2	Students	
Life Skills : Transitions	2	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		6	\$ 65,500 \$ 393,000
Lane School: Grades K-2	1	Students	\$ -
Lane School: Grades 3-5	2	Students	\$ -
Lane School: Grades 6-8	3	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	0.00	\$ 155,000 \$ -
Augmentative Communication	Students	20	\$ 4,000 \$ 80,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 5,667
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	11	\$ 1,900 \$ 20,900
Library Services	ADMr	No	\$ 9.25 \$ -
Substitute Teacher List Subscription	ADMr	No	\$ 0.81 \$ -
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 280,888
Total Cost of Services Ordered			\$ 1,736,655
Flex Dollar Balance (Amount Due)			\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Springfield	ADMr:	8,991.37
Total Flex Dollars Available		\$ 4,859,458	
2025-26 Flex Allocation		\$ 4,804,200	
2025-26 High Cost Pool (estimate)		\$ -	
2024-25 Flex Carryover (estimate)		\$ -	
2024-25 Professional Development Carryover (estimate)		\$ 55,258	
Menu Services		Unit	Order Cost \$ 6,464,624
Life Skills Consortium Placements			78 \$ 73,000 \$ 5,694,000
Life Skills : Grades K-5	40	Students	
Life Skills : Grades 6-8	17	Students	
Life Skills : Grades 9-12	21	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile			3 \$ 145,000 \$ 435,000
Lane School Placements			4 \$ 65,500 \$ 262,000
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	2	Students	\$ -
Lane School: Grades 6-8	2	Students	\$ -
Behavior Disorder Consultants	FTE		0.00 \$ 165,000 \$ -
School Psychologists	FTE		0.00 \$ 180,000 \$ -
Speech Language Pathologists	FTE		0.00 \$ 155,000 \$ -
Augmentative Communication	Students		0 \$ 4,000 \$ -
Direction Service	ADMr		Yes \$ 2.15 \$ 19,331
Sign Language Interpretation Services	Dollars		\$ - \$ - \$ -
MLK Jr. Education Center	Dollars		\$ - \$ - \$ -
Nursing Services	FTE		0.00 \$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr		Yes \$ 0.80 \$ 7,193
Career and Technical Education	Programs		21 \$ 1,900 \$ 39,900
Library Services	ADMr		No \$ 9.25 \$ -
Substitute Teacher List Subscription	ADMr		No \$ 0.81 \$ -
Courier Services	District		Yes \$ 7,200 \$ 7,200
Custom Services		\$ 254,836	
Request #1	One Slot for ISP		\$ 254,836
Request #2			\$ -
Request #3			\$ -
Transit Dollars		\$ -	
Total Cost of Services Ordered		\$ 6,719,460	
Flex Dollar Balance (Amount Due)		\$(1,860,002)	

Acronyms

AAC	Augmentative and Alternative Communication	ELL (ESL)	English Language Learning (also referred to as ESL or English as a Second Language)
ADA	Americans with Disabilities Act	ESD	Education Service District
ADM	Average Daily Membership - the average number of enrolled students of an educational unit.	FTE	Full-Time Equivalent
ADM_r	Average Daily Membership (Resident) - the ADM of the students who live in the district, regardless of where they attend.	GAAP	Generally Accepted Accounting Principles
ADM_w	Average Daily Membership (Weighted) - the ADM _r increased by a variety of weighting factors to obtain weighted average daily membership.	GASB	Governmental Accounting Standards Board
ASD	Autism Spectrum Disorder	GYO	Grown Your Own
ASIST	Applied Suicide Intervention Skills Training	IDEA	Individuals with Disabilities Education Act
AT	Assistive Technology	IEP	Individualized Education Plan
CLC	Connected Lane County	JDEP	Juvenile Detention Education Program
COLA	Cost of Living Adjustment	LEA	Local Education Agency
CPS	Collaborative Problem Solving	LES_D	Lane Education Service District
CTE	Career and Technical Education	LSP	Local Service Plan
DHH	Deaf or Hard-of-Hearing	MEP	Migrant Education Program
EC CARES	Early Childhood Coordination Agency for Referrals, Evaluations and Services	MLK	Martin Luther King Jr. Education Center
EI/ECSE	Early Intervention and Early Childhood Special Education	OAR	Oregon Administrative Rule
		ODE	Oregon Department of Education
		OI	Orthopedic Impairments
		ORS	Oregon Revised Statutes



OT/PT	Occupational Therapy and Physical Therapy	SIA	Student Investment Account
PBAM	Program Budgeting and Accounting Manual	SSA	Student Success Act
PBIS	Positive Behavior and Instructional Supports	SLP	Speech Language Pathologist
PERS	Public Employees Retirement System	SSF	State School Fund
RBT	Research for Better Teaching	SSPS	School Safety and Prevention System
RIS	Regional Inclusive Services	STEM	Science, Technology, Engineering and Math
RTAP	Regional Technical Assistance Program	TBI	Traumatic Brain Injury
SEL	Social Emotional Learning	VI	Vision Impaired
SERBU	John Serbu Youth Campus and Juvenile Justice Center	WREN	Western Regional Educator Network

Glossary of Terms

Account Codes

Account codes identify the funding source and nature of budget expenditures.

Accounting Systems

The total structure of records and procedures which discover, record, classify, summarize, and report information on the financial position of a governmental entity.

Accrual Basis

The basis of accounting under which transactions are recognized when they occur.

Adopted Budget

The financial plan adopted by the Board which forms a basis for expenditure appropriations.

Allocations

To divide an appropriation into amounts for specific purposes.

Appropriations

A legal authorization granted by the school board to make expenditures and to incur obligations for specific purposes.

Assets

Governmental resources with monetary value.

Beginning Fund Balance

Funds carried forward from the previous fiscal year that become a resource to support the appropriations for the next budgeted fiscal year.

Behavior Intervention

A therapeutic school environment focused on teaching students skills for success across all settings: academic, social, emotional, family and community.

Bond

A type of debt security for a specific sum of money to be repaid at a fixed time in the future, and carrying interest at a fixed rate, usually payable periodically.

Budgetary Control

The management of the district in accordance with an approved budget for the purpose of keeping expenditures within the limitations of available appropriations and available revenues.

Capital Projects Fund

Accounts for resources, usually bond sale proceeds, used for activities related to the purchase or construction of major capital assets, i.e., a new school or major building renovations.

Classified Staff

Employees in positions that are classified according to the duties and responsibilities involved in the work and do not require licensing by the Teacher Standards and Practices Commission as a condition of employment.

Component Districts

Districts served by the ESD.

Contingency

A special amount budgeted each year for unforeseen expenditures. Transfer of general fund operating contingency funds to cover unanticipated expenditures requires board approval.

Cost Center

A subdivision of the district that is charged with carrying on one or more specific purposes such as a department or special program.


County School Fund

Distributed by ESD sources and includes property tax levy, state forest fees, and various fines such as gambling fees.

Debt Service Fund

A fund established to account for payment of general long-term debt principal and interest.

Deficit

The excess of the liabilities of a fund over its assets. Oregon school districts may not carry deficits in any fund.

Ending Fund Balance

Funds remaining after the fiscal year is closed and all expenditures and revenues are accounted for. The ending fund balance of the current fiscal year becomes the beginning fund balance of the next fiscal year.

E-Rate

E-Rate is a Federal program, created by the Federal Communication Commission (FCC) and administered by the Universal Service Administrative Company (USAC) that subsidizes Internet and Telecom services for schools and libraries.

Fiscal Year

The 12 month operating year for the District, beginning on July 1 and ending on June 30 of the following year.

Fixed Assets

Assets of a long term character which are intended to continue to be held or used, such as land, buildings, machinery and equipment.

Function

A group of related activities aimed at accomplishing a major service or regulatory program for which a government is responsible.

Fund

A fiscal and accounting entity with a self-balancing set of accounts.

General Fund

A fund used to account for most operating activities except those activities required to be accounted for in another fund.

Grant

A donation or contribution in cash which may be made to support a specified purpose or function, or general purpose.

Licensed Staff

All licensed teachers, counselors, special education teachers, and other certified teaching staff under contract to the District. Also included in this group are child development specialists, student resource specialists, physical therapists, and occupational therapists.

Levy

Amount or rate of ad valorem tax certified by a local government for the support of governmental activities.

Measure 5

Property tax limitation passed by Oregon's voters in November 1990, limiting local property taxes for schools to \$5 per \$1,000 of assessed value.


Modified Accrual

The basis of accounting in which revenue is recorded when available and measurable.

Object

For fund accounting this term identifies and classifies the articles purchased or the service obtained.

Proposed Budget

Financial and operating plan for the district that the Superintendent is recommending to the public and budget committee.

Requirement

An expenditure or net decrease to a fund's resources.

Resolution

A formal order of a governing body.

Resources

Estimated beginning fund balances plus all anticipated revenues.

Revenue

Monies received or anticipated by a local government from either tax or non-tax sources.

Special Revenue Fund

A fund used to account for proceeds of specific revenue sources that are restricted to expenditures for specific purposes.

Supplemental Budget

A financial plan prepared after the regular budget has been adopted to meet unexpected needs or to spend revenues not anticipated when the regular budget was adopted.

Taxes

Compulsory charges levied by the District for the purpose of financing the operation of schools.

Transfers

Amounts distributed from one fund to finance activities in another fund. Interfund transfers require Board approval.

Transit

Funds transferred from the ESD to component district.





HUMAN RESOURCES REPORT TO LANE ESD BOARD

May 1, 2025

CLASSIFIED STAFF (Information)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>				
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>				
<i>Change of Status</i>				

LICENSED STAFF (Action)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>	14713	Recovery High School Program Admin	4/21/2025	Limited Duration
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>	13652 13655 13885 14112	Teacher, Life Skills Teacher, Life Skills Teacher, Life Skills Teacher, Life Skills	6/13/2025 6/13/2025 6/13/2025 4/22/2025	Resignation Resignation Resignation Resignation
<i>Change of Status</i>				

PROFESSIONAL STAFF (Information)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>				
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>				
<i>Change of Status</i>				

MANAGEMENT STAFF (Action)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>				
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>	10210	Executive Admin Assistant	4/11/2025	Resignation
<i>Change of Status</i>				

VACANCY NOTICES (Information)

Posting #	Position	Closing Date	Notes
966	Speech Language Pathologist	4/7/2025	In process

992	Sign Language Interpreter	4/7/2025	In process
1053	Teacher, Life Skills (Middle School)	4/7/2025	In process
1061	Teacher, Life Skills (Transitions)	Open pool	In process
1066	Instructional Assistant, Life Skills	Open pool	In process
1071	Instructional Assistant, Life Skills	Open pool	In Process
1072	Instructional Assistant, Life Skills	Open pool	In Process
1107	Instructional Assistant, Life Skills	Open pool	In process
1108	School Psychologist (2025-26 SY)	6/27/225	In process
1071	Instructional Assistant, Life Skills	Open pool	In process
1099	Education Instructional Assistant, ISP	Open pool	In process
1109	Special Education Consultant (2025-26 SY)	6/27/2025	In process
1111	Teacher, Vision Impaired (2025-26 SY)	6/27/2025	In process
1112	Teacher, Lane School (2025-26 SY)	6/27/2025	In process
1113	Teacher Life Skills (2025-26 SY)	6/27/2025	In process
1114	Speech Language Pathologist (2025-26 SY)	6/27/2025	In process
1119	Recovery High School Planning Admin (Temporary 10/31/2025)	3/27/2025	Filled
1120	Program Assistant, School Improvement	3/31/2025	Filled



LANE EDUCATION SERVICE DISTRICT

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Eugene, OR 97402

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541.461.8298 [Fax]

www.lesd.k12.or.us

EQUITY COMMITMENT LEADERSHIP COLLABORATION INTEGRITY

Prepared for: Lane ESD Board of Directors
Prepared by: Olivia Meyers Buch, Executive Director of Business Services
Meeting Date: May 6, 2025

March 2025 Financial Report (Unaudited)

General Fund Financial Report

The Financial Report for the General Fund for the period ending March 31, 2025 follows this report. Year-to-date operating revenues through March 31, 2025 total \$23,540,430 or 81.9% of total budgeted operating revenues as compared to \$22,691,221 or 80.8% through March 31, 2024. As usual, state school fund formula revenue (state school fund - general support and property taxes) constitute the majority of funds received. Total projected resources of \$31,797,720 is \$424,241 more than budgeted.

Year-to-date operating expenditures through March 31, 2025 total \$15,457,362 or 60.5% of total budgeted operating expenditures as compared to \$14,554,776 or 59.4% through March 31, 2024. Total projected operating expenditures of \$24,914,371 is \$646,279 less than budgeted. Total projected transfers and transits of \$3,733,846 is \$13,141 less than budgeted.

Projected resources and requirements through June 30, 2025 result in an ending fund balance of \$3,149,503, with \$1,234,309 assigned (reserved) for districts. The remaining ending fund balance of \$1,915,194 is unassigned and represents 6.6% of projected operating revenues. The projected ending fund balance reflects an increase, or operating surplus, of \$439,524.

Appropriations

A summary of appropriations for all funds for the period ending March 31, 2025 follows this report. Two appropriations are currently overspent. The appropriation for Support Services in the Capital Projects Fund (Equipment Replacement Fund) is overspent by \$247, pending a budget transfer from the Debt Service appropriation. The appropriation for Instruction in the Internal Service Fund is overspent by \$53,800 (related to replacement of Smart Boards at Lane School), pending a budget transfer from the Support Services appropriation.

The appropriation for Enterprise and Community Services in the Special Revenue Fund (Food Service Fund) is projected to be overspent by \$5,632, pending a budget transfer from the Support Services appropriation.

Cash and Investment Account Balances by Type

	Yield	Beginning Balance	Deposits	Withdrawals	Ending Balance
Municipal Investor Checking	0.35%	\$835,6544	\$2,800,9338	\$3,117,221	\$519,366
Oregon LGIP (4513)	4.64%	\$8,507,891	\$1,508,976	\$2,110,000	\$7,916,866
Oregon LGIP (3676)	4.64%	\$682,573	\$86,3029	\$0.05	\$768,875
Total		\$17,547,008	\$30,381,3435	\$5,227,221	\$9,205,107

Assurances

All cash, investment and credit card accounts have been balanced, reconciled and reviewed and all cash and investment accounts have been reconciled to the general ledger as of March 31, 2025.

The adopted budget reflects expected expenditures. All payroll reports have been filed and payroll liabilities have been paid timely. All federal and state reimbursement requests as well as required financial reporting forms have been filed timely. All credit card expenditures, travel and other reimbursements have been reviewed and approved at the proper level.

There have been no significant changes to the internal control system, to the accounting system or accounting policies that are significant. The business services department is adequately staffed to allow for proper segregation of duties and I am not aware of any new pronouncements or other financial changes that may require additional staff time to properly implement.

All financial statements that have been provided to the board are accurate and complete to the best of my knowledge and I am aware of no other financial matters that the board should be aware of at this time. I know of no cases of fraud or other misconduct and I have not been asked by the superintendent to do anything that makes me feel uncomfortable or to present any information I feel is inaccurate.

Please contact me with questions or if you would like any additional information.

LANE EDUCATION SERVICE DISTRICT
General Fund Financial Report (Unaudited)
For the Period Ending March 31, 2025

	Fiscal Year 2023-24					Fiscal Year 2024-25					
	Amended Budget	Actuals thru 3/31/2024	% of Budget	Actuals thru 6/30/2024	% of Budget	Adopted Budget	Actuals thru 3/31/2025	% of Budget	Projected thru 6/30/2025	% of Budget	Budget Variance
RESOURCES											
State School Fund Formula Revenue											
State School Fund - General Support	\$ 15,532,800	\$ 13,455,005	86.6%	\$ 15,996,395	103.0%	\$ 16,240,313	\$ 13,694,298	84.3%	\$ 16,468,941	101.4%	\$ 228,628
Property Taxes Levied by District	8,688,000	8,391,441	96.6%	8,611,369	99.1%	9,038,376	8,729,842	96.6%	9,039,869	100.0%	1,493
Other Local Revenues	66,200	34,361	51.9%	87,771	132.6%	86,659	18,643	21.5%	45,000	51.9%	(41,659)
Services Provided to Districts	2,550,400	13,330	0.5%	1,256,511	49.3% ⁽¹⁾	2,209,514	120,487	5.5%	2,195,519	99.4%	(13,995)
Fees Charged to Grants	670,000	292,805	43.7%	812,985	121.3%	600,000	467,788	78.0%	675,000	112.5%	75,000
Other Revenues	577,700	504,279	87.3%	765,427	132.5%	580,000	509,372	87.8%	663,412	114.4%	83,412
Total Operating Revenues	\$ 28,085,100	\$ 22,691,221	80.8%	\$ 27,530,458	98.0%	\$ 28,754,862	\$ 23,540,430	81.9%	\$ 29,087,741	101.2%	\$ 332,879
Beginning Fund Balance (District Reserves)	921,200	1,165,894	126.6%	1,165,894	126.6%	1,103,757	1,286,636	116.6%	1,286,636	116.6%	182,879
Beginning Fund Balance	2,050,000	2,080,746	101.5%	2,080,746	101.5%	1,514,860	1,423,343	94.0%	1,423,343	94.0%	(91,517)
TOTAL RESOURCES	\$ 31,056,300	\$ 25,937,861	83.5%	\$ 30,777,098	99.1%	\$ 31,373,479	\$ 26,250,410	83.7%	\$ 31,797,720	101.4%	\$ 424,241
REQUIREMENTS											
Salaries	\$ 10,981,145	\$ 7,215,324	65.7%	\$ 10,973,743	99.9%	\$ 11,436,471	\$ 7,241,621	63.3%	\$ 11,268,253	98.5%	\$ (168,218)
Associated Payroll Costs	7,372,689	4,317,942	58.6%	6,470,402	87.8% ⁽²⁾	7,495,703	4,282,739	57.1%	6,937,691	92.6%	(558,012) ⁽²⁾
Purchased Services	5,490,697	2,302,507	41.9%	5,713,478	104.1%	5,695,892	3,242,937	56.9%	5,691,708	99.9%	(4,184)
Supplies and Materials	446,550	470,578	105.4%	599,614	134.3%	662,884	421,802	63.6%	654,878	98.8%	(8,006)
Other Objects	230,100	248,425	108.0%	263,685	114.6%	269,700	268,262	99.5%	361,841	134.2%	92,141
Total Operating Expenditures	\$ 24,521,181	\$ 14,554,776	59.4%	\$ 24,020,922	98.0%	\$ 25,560,650	\$ 15,457,362	60.5%	\$ 24,914,371	97.5%	\$ (646,279)
Transfers											
Interfund Transfers	459,000	429,000	93.5%	448,198	97.6%	449,000	429,000	95.5%	449,000	100.0%	-
Transits to Districts	4,110,163	882,847	21.5%	3,597,999	87.5%	3,297,987	1,551,175	47.0%	3,284,846	99.6%	(13,141)
Other Uses of Funds											
Planned Reserve (District Reserves)	965,956	-	0.0%	-	0.0%	464,161	-	0.0%	-	0.0%	(464,161)
Planned Reserve	400,000	-	0.0%	-	0.0%	801,681	-	0.0%	-	0.0%	(801,681)
Reserved for Next Year	600,000	-	0.0%	-	0.0%	800,000	-	0.0%	-	0.0%	(800,000)
TOTAL REQUIREMENTS	\$ 31,056,300	\$ 15,866,623	51.1%	\$ 28,067,119	90.4%	\$ 31,373,479	\$ 17,437,537	55.6%	\$ 28,648,217	91.3%	\$ (2,725,262)
ENDING FUND BALANCE	-	\$ 10,071,238		\$ 2,709,979		-	\$ 8,812,872		\$ 3,149,503		
Assigned for Districts				\$ 1,286,636					\$ 1,234,309		
Unassigned Fund Balance				\$ 1,423,343	5.2% *				\$ 1,915,194	6.6% *	
<i>* Percent of Operating Revenues</i>				\$ 2,709,979					\$ 3,149,503		

(1) Variance is due to actual services ordered by districts being less than anticipated.

(2) Variance is due to savings as a result of implementing new opt out incentive that has resulted in lower health insurance premium costs.

LANE EDUCATION SERVICE DISTRICT
Appropriation Monitoring
For the Period Ending March 31, 2025

Fiscal Year 2024-25

		Adopted Budget	Actuals thru 3/31/2025	% of Budget	Projected thru 6/30/2025	% of Budget	BUDGET VARIANCE	NOTES
GENERAL FUND	100							
Instruction		13,292,681	7,575,364	57.0%	12,849,171	96.7%	443,510	+
Support Services		12,267,969	7,881,998	64.2%	12,065,199	98.3%	202,770	+
Transfers of Funds		449,000	429,000	95.5%	449,000	100.0%	-	+
Apportionment of Funds by ESD		3,297,987	1,551,175	47.0%	3,284,846	99.6%	13,141	+
Contingencies		1,265,842	-	0.0%	-	0.0%	1,265,842	+
Unappropriated Ending Fund Balance		800,000	-	0.0%	-	0.0%	800,000	
Total		31,373,479	17,437,537	55.6%	28,648,217	91.3%	2,725,262	+
SPECIAL REVENUE FUND	200							
Instruction		3,252,835	1,938,645	59.6%	3,250,000	99.9%	2,835	+
Support Services		14,531,841	10,221,396	70.3%	14,000,000	96.3%	531,841	+
Enterprise and Community Services		75,000	57,257	76.3%	80,632	107.5%	(5,632)	- Pending Appropriation Transfer
Transfers of Funds		2,500	-	0.0%	-	0.0%	2,500	+
Apportionment of Funds by ESD		22,102,824	16,605,491	75.1%	22,000,000	99.5%	102,824	+
Total		39,965,000	28,822,789	72.1%	39,330,632	98.4%	634,368	+
DEBT SERVICE FUND	300							
Support Services		30	0	1.3%	1	4.7%	29	+
Debt Service		916,825	83,412	9.1%	916,825	100.0%	-	+
Total		916,855	83,413	9.1%	916,826	100.0%	29	+
CAPITAL PROJECTS FUND	400							
Support Services		148,914	149,161	100.2%	149,161	100.2%	(247)	- Pending Appropriation Transfer
Debt Service		136,086	63,067	46.3%	135,838	99.8%	248	+
Total		285,000	212,229	74.5%	285,000	100.0%	0	+
INTERNAL SERVICE FUND	600							
Instruction		-	53,800	#DIV/0!	53,800	#DIV/0!	(53,800)	- Pending Appropriation Transfer
Support Services		435,026	206,844	47.5%	365,000	83.9%	70,026	+
Total		435,026	260,645	59.9%	418,800	96.3%	16,226	+
GRAND TOTAL	ALL	72,975,360	46,816,612	271.2%	30,268,844	41.5%	3,375,885	



May 6, 2025

SUPERINTENDENT EVALUATION

Summary of Superintendent Tony Scurto's Annual Evaluation by the Education Service District Board

The seven members of the Lane Education Service District Board of Directors have completed the annual evaluation of Superintendent Tony Scurto for 2024-25. All board members have served on the board for at least one full year and have been able to observe and be a part of the successes achieved so far this year.

All board members, the Lane Superintendents' Council members, and the full management group were invited to provide input via survey. Superintendent Scurto provided the Board with a self-evaluation for consideration in the development of his evaluation.

The Board's evaluation focused on 1) professional standards and 2) the goals for the organization set previously by the board and developed by Superintendent Scurto in the Fall of 2024.

When reviewing performance based on the professional standards, the Board determined that Superintendent Scurto's performance was effective or accomplished in the areas of visionary leadership, policy and governance, communications and community relations, effective management, resource management, labor relations, organizational and resource management, ethical leadership, and labor relations.

The board determined that Superintendent Scurto is effective and/or accomplished in attaining the goals set by the board and superintendent in Fall of 2024.

Superintendents' Council members rated Superintendent Scurto favorably over all Performance questions. A sampling of remarks from the Superintendents' Council include:

- "Tony is particularly helpful for smaller districts in the county. He is a strong mentor and source of support for those districts."
- "Tony is highly visible and well known and respected in the community and around the state."
- "Tony is a great listener and is very thoughtful in his approach to planning and solving problems."

The Board praises Superintendent Scurto for his strong and consistent performance. The Board appreciates Superintendent Scurto's approach and ability to extend the culture of serving the districts. Superintendent Scurto brings a calming influence to the organization. When looking at the relationships with the peers and constituents, the Board sees that Superintendent Scurto and his peers are positively engaged. The agency is fortunate to have Superintendent Scurto at the lead.

The Board looks forward to continuing to work together to further Lane ESD's success.

Lane Education Service District

Code: CA/CAA
Adopted: 7/27/93
Readopted: 1/22/02
Orig. Code(s): CA/CAA

Administration Goals and Objectives

(Goals are usually established more regularly. Consider whether this policy is still needed considering best practices.)

The purpose of administration in the Lane Education Service District is to:

1. Assist the State Board of Education through contract in providing state-level services and support of state laws and state minimum standards;
2. Provide professional educational facilities and services including participation with component districts in the identification and prioritizing of instructional and support service needs and the development of plans and procedures for implementing, modifying and terminating such services;
3. Assist component districts in the delivery of instructional and support services that help create and foster an environment in which students can learn effectively;
4. Implement policy as adopted by the Board including recommendation for new and revised policy based on the needs of the ESD and the requirements of law;
5. Carry out such other duties and services as mandated by law.

Major ESD administration goals will be to:

1. Recommend identified instructional and support service goals for Board adoption and service delivery planning;
2. Direct an annual review of district operations to include but not be limited to the assessment and evaluation of all resolution services;
3. Implement the management function so as to ensure the best and most effective learning programs through achieving such subgoals as:
 - a. Providing leadership in current educational developments;
 - b. Supporting staff development necessary for establishing and operating learning programs that meet learner needs;
 - c. Coordinating cooperative efforts for improving learning programs, facilities, equipment and materials; and
 - d. Providing opportunities for staff, students, parents and others to access the decision-making process.
4. Effectively manage the ESD's various facilities, funds and programs;

5. Provide professional advice and counsel to the Board and to any committees established by Board action.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)
[ORS 332.505](#)

[ORS 332.515](#)

[OAR 581-022-1720](#)

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Lane Education Service District

Code: CB
Adopted: 7/27/93
Revised/Readopted: 1/22/02
Orig. Code(s): CB

Superintendent

The superintendent¹ is designated as the ESD’s chief executive officer. Under the Board’s direction, the superintendent exercises general supervision of all ESD programs, services and personnel. The superintendent is responsible for managing the ESD under the Board’s policies and is accountable to the Board for that management. The Board may not direct the superintendent to take any action that conflicts with a local, state or federal law² that applies to education service districts or take an adverse employment action against the superintendent for complying with such laws.

The superintendent may delegate to other ESD personnel any powers and duties imposed upon the superintendent by Board policies or by vote of the Board. Delegation of power or duty will not relieve the superintendent of responsibility for action taken under such delegation.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(5\)](#)
[ORS 334.225](#)
[OAR 581-024-0240](#)
[OAR 581-024-0245](#)
[OAR 584-005-0005\(51\)](#)

¹ The term “superintendent” includes an interim superintendent.

² “Local, state or federal law” means a local, state or federal directive having the force of law, including an ordinance, a city or county resolution, a statute, a court decision, an administrative rule or regulation, an order issued in compliance with ORS Chapter 183, an executive order or any other directive, declaration or statement that is issued in compliance with the law as having the force of law and that is issued by a local government as defined in ORS 174.116, the state government as defined in ORS 174.111 or the federal government.



Lane Education Service District

Code: CBAA
Adopted: 7/12/94
Readopted: 1/22/02
Orig. Code(s): CBAA

Superintendent's Duty to Report

The superintendent shall report any Lane ESD licensed employee or practicum participant who may have committed any act of gross neglect of duty or gross unfitness as required by Oregon law.

The superintendent will ensure that an appropriate investigation has been conducted whenever he/she reasonably believes such acts have been committed.

Reports shall be made to the executive director of the Teacher Standards and Practices Commission (TSPC) within 30 days of completion of the investigation.

The superintendent may retain non-ESD personnel as needed to conduct investigations.

END OF POLICY

Legal Reference(s):

[ORS 334.225](#)
[ORS 342.125](#)
[ORS 342.140](#)
[ORS 342.143](#)
[ORS 342.173](#)
[ORS 342.175](#)

[ORS 342.200](#)
[OAR 581-023-0006 to -0050](#)
[OAR 581-024-0200 to -0310](#)
[OAR 584-020-0000 to -0045](#)
[OAR 584-036-0035 \(1\)](#)

[OAR 584-046-0005 to -0035](#)
[OAR 584-048-0085 to -0102](#)
[OAR 584-080-0151](#)
[OAR 584-080-0161](#)

Lane Education Service District

Code: CHD
Adopted: 7/27/93
Readopted: 1/22/02
Orig. Code(s): CHD

Administration in the Absence of Policy

In cases where emergency action must be taken where policy direction has not been provided, the superintendent shall have the power to act. The superintendent will report to the Board at its next regular or special meeting of such actions.

END OF POLICY

Legal Reference(s):

[ORS 334.125 \(7\)](#)

[OAR 581-024-0240](#)

Lane Education Service District

Code: CHCA
Adopted: 7/27/93
Revised/Readopted: 1/22/02
Orig. Code(s): CHCA

Handbooks

In order that pertinent Board policies, administrative regulations, school and program rules and procedures may be known by all staff members, patrons, students and affected parents, ESD administrators are granted authority to issue staff and student handbooks.

The contents of all handbooks must conform with ESD-wide board policies and administrative regulations. The publication shall bear the name of the ESD and be of a quality that reflects favorably on the ESD. The Board, therefore, expects all handbooks to be approved by the superintendent or designee before publication.

The ESD will make all handbooks published available to the Board for informational purposes.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

Lane Education Service District

Code: CHA
Adopted: 7/27/93
Revised/Readopted: 1/22/02
Orig. Code(s): CHA/CHB/CHC

Administrative Regulations

The Board delegates to the superintendent the function of specifying required actions and designing detailed arrangements to operate the district in accordance with Board policy. These detailed arrangements constitute the administrative rules governing Lane ESD.

The superintendent will carefully weigh the counsel, when given, by representatives of staff, component districts and community organizations regarding those administrative regulations. They will inform the Board of such counsel in presenting administrative regulations for Board review.

The Board reserves the right to review all administrative regulations and procedures, and will revise such regulations when, in the Board's judgment, they are inconsistent with policies set by the Board or when required by state or federal law.

Board members will be notified of all new or revised district administrative regulations. Staff and students will be advised of all administrative regulations affecting them.

END OF POLICY

Legal Reference(s):

[ORS 334.125 \(7\)](#)
[ORS 334.225](#)

[OAR 581-024-0240](#)
[OAR 581-024-0245](#)

Lane Education Service District

Code: CH
Adopted: 7/27/93
Revised/Readopted: 1/22/02
Orig. Code(s): CH

Policy Implementation

The superintendent is responsible for implementing the Board’s policies and interpreting them to staff, students and the public. Other administrators share in this responsibility.

When adopted Board policies require the implementation of administrative rules, such rules will be developed by the superintendent in consultation with staff members and other persons and groups as appropriate. These administrative rules will then be submitted for the Board’s information.

Policies officially adopted by the Board and other administrative regulations formulated to implement adopted Board policies will be included in the Board Policy Handbook. Staff and student/parent handbooks also will be used for disseminating policies and administrative regulations to persons directly affected by them.

The Board’s Policy Handbook will be maintained in the ESD office and other locations designated by the superintendent and shall be available for inspection during regular working hours. Each ESD employee will be specifically notified of the existence and availability of personnel policies.

Administrators are authorized to establish rules and procedures for the staff [and student bodies of their schools] as long as these rules and procedures are consistent with board policies and administrative regulations established by the Board and superintendent.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

[OAR 581-024-0240](#)

[OAR 581-024-0245](#)

Lane Education Service District

Code: CCGA
Adopted: 4/26/94
Revised/Readopted: 1/22/02
Orig. Code(s): CCGA

Discipline, Suspension and Dismissal

The Board has an obligation to the component districts and the community of Lane ESD to employ the best professional staff possible in terms of training and ability to meet the educational needs of component districts and their staffs and students. It shall meet that obligation by retaining only those professional staff members who meet those standards.

It is the responsibility of the superintendent to assure the implementation of the **evaluation plan** in order that staff members may be informed of the adequacy of their performance in the ESD and assisted in their professional development whenever possible. Reassignment may be an appropriate measure to aid in such professional development and performance improvement and will be considered when appropriate and applicable. When it is evident that an employee fails to meet the ESD's performance standards or the requirements of the position description and the superintendent determines that assistance is appropriate, corrective action will be implemented in an effort to improve the employee's performance. The degree of discipline will be reasonably related to the seriousness of the offense and the record of the employee.

Commented [LF1]: See policy CCG

In the event the employee is unable or unwilling to evidence satisfactory improvement, or in the event the failure to meet the performance standards does not warrant a plan of assistance/program of assistance for improvement, the superintendent shall recommend to the Board that such employee either be dismissed or non-renewed.

The Board shall consider such recommendations in accordance with statutory requirements. All **confidential** and nonlicensed supervisory and administrative employees shall be afforded due process as defined in Oregon Revised Statutes.

Commented [LF2]: Moved from CCGA-AR

END OF POLICY

Legal Reference(s):

ORS 192.660 (1)(i)	ORS 342.513	ORS 342.835
ORS 334.125	ORS 342.663 <i>renumbered and now</i>	ORS 342.865 - 342.915
ORS 342.120	<i>in 332.544</i>	OAR 581-022-1720 2410
ORS 332.505	ORS 342.815 – 342.856	OAR 584-020-0040

[Eugene Education Association v. Eugene School District 4J, Case Nos. UP 8-87 and UP 18-87, 9 PECBR 9391 \(1987\); rev'd, Or. App. 78 \(1988\); vacated and remanded, 306 Or. 659 \(1988\).](#)
[Hanson v. Culver School District No. 5 \(FDAB 1975\).](#)

Lane Education Service District

Code: CCB
Adopted: 1/22/02
Readopted: 7/08/08
Orig. Code(s): CCB

Line and Staff Relations

The Board expects the superintendent to establish a clear understanding of working relationships within the Lane ESD system with all staff.

Lines of direct authority will be those approved by the Board and shown on ESD organization charts.

Staff members will be expected to refer matters requiring administrative action to the administrator to whom they report. That administrator will refer such matters to the next higher administrative authority, when necessary. All staff will inform their immediate supervisor of their activities by whatever means the administrator considers appropriate.

Lines of authority should not restrict the cooperative working relationship of all staff members in developing the best possible ESD programs and services. In addition, this policy does not restrict protected labor relations communications of bargaining unit members. The established lines of authority represent direction of authority and responsibility. When the staff work together, the lines represent a two-way flow of ideas to improve the programs and operations in the ESD.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(5\)](#)
[ORS 334.225](#)

[OAR 581-024-0240](#)
[OAR 581-024-0245](#)

Lebanon Education Association/OEA v. Lebanon Community School District, 22 PECBR 323 (2008).

Lane Education Service District

Code: CC
Adopted: 7/27/93
Revised/Readopted: 1/22/02
Orig. Code(s): CC

Administrative Organization

The Board’s legal authority will be delegated through the superintendent to the administrative staff as shown in the Board-approved organizational structure chart of the district.

Lines of authority on the chart represent direction of authority and responsibility.

The superintendent may reorganize lines of authority and revise the organizational chart subject to Board approval of major changes and creation or elimination of positions. The Board expects the superintendent to keep the administrative structure current with the needs for supervision and accountability within the district. The organizational chart will be reviewed annually and submitted to the Board for approval, at least annually.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(5\)](#)
[ORS 334.225](#)

[OAR 581-024-0240](#)
[OAR 581-024-0245](#)

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

Lane Education Service District

Code: CBG
Adopted: 7/27/93
Revised/Readopted: 1/22/02; 2/05/19
Orig. Code(s): CBG

Evaluation of the Superintendent

The Board will formally evaluate the superintendent’s job performance at least once each year. The evaluation will be based on the superintendent’s job description, any applicable standards of performance, Board policy and progress in attaining any goals for the year established by the superintendent and/or the Board.

Additional criteria for the evaluation, if any, will be developed at a public Board meeting prior to conducting the evaluation. The superintendent will be notified of the additional criteria prior to the evaluation.

The Board’s discussion and conferences with and about the superintendent and their performance will be conducted in executive session, unless the superintendent requests a session open to the public. Such an executive session will not include a general evaluation of any ESD goal, objective or operation. Results of the superintendent’s evaluation will be written and placed in the superintendent’s personnel file.

At the Board’s discretion, it may notify the superintendent in writing of specific areas to be remedied, and the superintendent may be given an opportunity to correct the problem(s). Where the Board provided written notice pursuant to the prior sentence, if the Board determines the superintendent’s performance remains unsatisfactory, the Board may dismiss or non-renew the superintendent pursuant to Board policy, the superintendent’s employment contract and state law and rules. In those situations where the superintendent’s employment contract includes an evaluation, dismissal or non-renewal provision, it shall take precedent over this policy.

END OF POLICY

Legal Reference(s):

[ORS 192.660\(2\), \(8\)](#)

[ORS 334.225](#)

Hanson v. Culver Sch. Dist. (FDAB 1975).

Lane Education Service District

Code: CBF
Adopted: 7/27/93
Readopted: 1/22/02
Orig. Code(s): CBF

Superintendent's Consulting Activities

(Is this in the superintendent's contract?)

The Board expects the superintendent to devote full attention and energy to the concerns of Lane ESD. The superintendent may not be engaged in any other employment nor in long-term consulting assignments. The Board, however, recognizes the superintendent's obligation to contribute to the profession of the ESD administration and to the field of public education in general. This policy, therefore, does not prohibit the superintendent from undertaking occasional consulting work that does not conflict with obligations to the ESD. Any such task that requires the superintendent's absence for two or more consecutive working days must have prior approval of the Board.

END OF POLICY

Legal Reference(s):

[ORS 334.225](#)

Lane Education Service District

Code: CBE
Adopted: 7/27/93
Readopted: 1/22/02
Orig. Code(s): CBE

Superintendent's Continuing Professional Development

(Does the superintendent's contract contain language about professional development? What about the absence language?)

The Board expects the superintendent to be informed of new and promising developments in the field of education by visiting other ESD's, and other school systems and attending educational conferences, seminars, workshops and other professional meetings. The superintendent will inform the Board chair about meetings or visits which will cause ~~him/her an absence to be absent~~ from the ESD for two or more consecutive working days.

END OF POLICY

Legal Reference(s):

[ORS 334.225](#)

~~OR 584.048-0110~~

Commented [LF1]: Not sure what 'other professional' meetings refers to. Other education related agencies which support the superintendent's role?

Commented [LF2]: This OAR reference does not exist anymore

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Lane Education Service District

Code: CBC
Adopted: 9/27/93
Revised/Readopted: 1/22/02; 1/22/08
Orig. Code(s): CBC/CBD

Superintendent's Contract

The superintendent, upon appointment by the Board, will receive a written contract which will state the terms of employment such as compensation, benefits and other conditions. The Board may not issue a contract that includes terms which direct the superintendent¹ to take any action that conflicts with a local, state or federal law² that applies to the ESD, or which allows the Board to take an adverse employment action against the superintendent for complying with such laws.

The compensation and benefits for the position of superintendent will be fixed by the Board and based upon the responsibilities required of the superintendent in performing their duties.

The Board may not enter into an employment contract that contains provisions that expressly obligates the ESD to compensate the superintendent for work that is not performed.

Provisions for termination of the superintendent's employment, either by the Board or the superintendent, will also be set forth in the superintendent's employment contract. The employment contract, if it includes a mutually agreed to termination-without-cause provision by the Board, will include a 12-month notice of termination for such provision.

For a period of one year after termination of the contract the superintendent may not:

1. Purchase property or surplus property owned by the ESD; or
2. Use property owned by the ESD in a manner other than the manner permitted for the general public.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(5\)](#)
[ORS 334.225](#)
[ORS 342.549](#)
[ORS 342.815](#)
[OAR 584-005-0005\(51\)](#)

¹ The term "superintendent" includes an interim superintendent.

² "Local, state or federal law" means a local, state or federal directive having the force of law, including an ordinance, a city or county resolution, a statute, a court decision, an administrative rule or regulation, an order issued in compliance with ORS Chapter 183, an executive order or any other directive, declaration or statement that is issued in compliance with the law as having the force of law and that is issued by a local government as defined in ORS 174.116, the state government as defined in ORS 174.111 or the federal government.

Lane Education Service District

Code: CBB
Adopted: 7/27/93
Revised/Readopted: 1/22/02; 8/27/02
Orig. Code(s): CBB

Recruitment and Appointment of the Superintendent

The Board considers foremost among its responsibilities, the selection and appointment of a superintendent who can effectively translate into action the Board's policies and the community's aspirations for its schools.

Whenever the position of superintendent shall be vacant, the Board shall appoint a superintendent and fix the salary and term of office.

The Board shall actively seek the best qualified and most capable candidate for the position of chief executive officer of this ESD. The Board may seek the advice and counsel of interested individuals, e.g., staff, component districts and community, or of an advisory committee, or it may hire consultants to assist in screening candidates and to encourage the filing of applications by professional educators who meet the qualifications. Final selection will rest with the Board after a thorough consideration of qualified applicants.

The Board shall develop and adopt the standards (e.g., candidate qualities and work experience), criteria (e.g., application, screening and hiring process) and policy directives (e.g., promote from within, state and/or national search) to be used in hiring the superintendent, or interim superintendent, at a meeting open to the public and at which the public has had an opportunity to comment.

Recruitment procedures shall be prepared in advance of the search and may include the following:

1. The preparation of a written job specification for the position of superintendent;
2. Preparation of written qualifications (in addition to proper state certification);
3. Preparation of informative material describing Lane ESD and its educational goals;;
4. The Board will appoint the superintendent by a majority vote of the Board members at a meeting for which notice has been given of the intended action.

The Board secretary shall take and keep minutes of regular Board meetings and executive sessions held during this process.

Any candidate who is hired and who is determined to have misrepresented facts relative to their qualifications for employment or relative to factors upon which a determination of salary is based shall be subject to dismissal. This Board shall consider such misrepresentation sufficient grounds for dismissal.

END OF POLICY

Commented [LF1]: Is this in the superintendent's contract? Or is preferred here?

Legal Reference(s):

[ORS 192.660\(7\)\(d\)](#)

[ORS 334.225](#)

Lane Education Service District

Code: CPA
Adopted: 1/22/02
Revised/Readopted: 8/28/12; 2/07/23
Orig. Code(s): CPA

Layoff and Recall for Administrators

This policy applies to all licensed administrators below the rank of assistant superintendent who are not considered teachers under ORS 342.934.¹

The Board retains the right to determine when a layoff is necessary. Layoffs shall be by position. A reduction in hours does not constitute a layoff.

The factors considered in the layoff process will be license, seniority, qualifications, merit and/or competence.

The Board expects administration to retain, consistent with state law, the most capable and productive of the licensed and qualified employees needed to carry out the approved programs and services of the ESD.

Prior to initial development of a recall procedure for administrators the Board will consult with the employees or a designated representative of the employees covered by this policy.

The ESD will develop administrative regulations to implement this policy.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)
[ORS 342.934](#)

¹ Prior to laying off any administrators, the district will work with legal counsel to determine if the cultural or linguistic expertise criteria apply to any impacted employees.

Lane Education Service District

Code: CI
Adopted: 7/27/93
Revised/Readopted: 1/22/02
Orig. Code(s): CI

Temporary Administrative Arrangements

When the superintendent is to be absent from the ESD, the superintendent shall delegate to an administrator general supervisory responsibility and the authority to act in the superintendent's stead.

If the superintendent is unable to serve because they are disabled or for some other reason, the Board will assign the superintendent's duties, as appropriate.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

[OAR 581-024-0240](#)

[OAR 581-024-0245](#)

Lane Education Service District

Code: DA
Adopted: 6/27/00
Readopted: 12/11/01; 8/27/02
Orig. Code(s): DA

Fiscal Management Objectives

The Board recognizes its responsibility to the community for maintaining an educational program that meets the minimum standards set by law and providing such additional programs as are desired to meet educational goals in Lane ESD and component districts. The Board, however, also recognizes its responsibility to ensure that public monies expended by the ESD are utilized with prudence. Adequate constraints and records shall be established to ensure that end.

The Board by law holds the authority to fix the budget, levy taxes, approve bids, appropriate funds to the ESD and to set policies for the operation of the ESD.

To meet the goals of this policy, the Board requires the superintendent to:

1. Establish sound accounting procedures based upon program budgeting;
2. Institute effective business practices;
3. Review the financial operations annually and report to the Board on effectiveness and recommended improvements;
4. Make available fiscal procedures and responsibilities for Board review.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

Lane Education Service District

Code: DB
Adopted: 9/27/94
Revised/Readopted: 11/15/11
Orig. Code(s): DB

District Budget

The budget committee shall prepare and the Board shall adopt, a budget for operational and administrative expenses of the ESD.

The ESD district budget will serve as the financial plan of operation for the ESD district and will include estimates of expenditures for a given period and purpose, and the proposed means of financing the estimated expenditures. The ESD district may provide that the budget and budget documents be prepared on an annual or biennial basis.

The ESD district budget will be prepared in full-compliance with federal and state laws and regulations and locally adopted procedures. The superintendent will be designated as budget officer and they he/she or a designee will prepare the budget document.

The Board will serve as the ESD's district's budget committee along with an equal number of electors plus one who are members of component school-district boards.

In appointing members, the Board will consider equitable representation of the component school-districts. Considerations shall include general location and size.

The term of appointment of a budget committee in an ESD a-district that prepares an annual budget shall be three years. Appointive members of a budget committee in an ESD a-district that prepares a biennial budget shall be appointed to four-year terms.

As budget officer the superintendent shall perform, or cause to have performed, the following:

1. Presentation of a budget calendar;
2. Preparation of the budget;
3. Presentation of the budget to the budget committee;
4. Preparation and submission of all resolutions for Board action as necessary to adopt the budget; to make the appropriations; to determine, make and declare the ad valorem property tax amount or rate to be certified to the assessor for the ensuing year; and to itemize and categorize the ad valorem property tax amount or rate as provided in Oregon Revised Statute (ORS) ORS 310.060;
5. Preparation and filing of all necessary legal notices and reports required by the Local Budget Law.

The fiscal year will extend from July 1 to June 30 inclusive.

The Board will adopt a budget calendar which identifies dates and deadlines required for the legal presentation and adoption of the budget.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)
[ORS 328.542 to -328.745](#)

[ORS 334.240](#)
[OAR 581-024-0206\(3\)\(d\)](#)

[OAR 581-024-0260](#)
[OAR 581-024-0262](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.

Lane Education Service District

Code: DBC
Adopted: 5/24/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBC

Budget Calendar

(Not a required policy)

The Board will annually adopt a budget calendar which identifies dates and deadlines required for the legal presentation and adoption of the budget.

The superintendent will prepare and recommend a proposed calendar for Board approval. The calendar will identify dates and activities to include those needed to comply with state law.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 328.542 to -328.565](#)

Lane Education Service District

Code: DBD
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBD

Budget Priorities

(Not a required policy)

The ESD ~~As the budget is prepared,~~ staff will use a prioritizing system consistent with program needs as identified by staff and the Board. Priorities should be established to be used as a basis for budget additions or reductions.

The budget committee will review suggested priorities and will either accept, modify or reject the priorities.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

Lane Education Service District

Code: DBE
Adopted: 5/24/94
Readopted: 12/11/01; 11/15/11
Orig. Code(s): DBE

Budget Preparation

The superintendent and budget committee have the responsibility for the budget preparation. The superintendent will develop such procedures necessary to ensure that the proposed ESD budget reflects all areas of the ESD's district operation.

The superintendent and administrative staff will establish budget priorities for the ESD and will make appropriate recommendations related to those priorities to the Board and the budget committee.

The superintendent will deliver the completed ~~budget message and actual~~ budget document and budget message to the budget committee when they ~~the message and budget have been completed and~~ are ready for presentation.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 328.542 to -328.565](#)

[ORS 334.240](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.
OR DEP'T OF REVENUE, LOCAL BUDGETING MANUAL.

Lane Education Service District

Code: DBEA
Adopted: 6/27/00
Revised/Readopted: 12/11/01; 8/27/02; 3/21/06
Orig. Code(s): DBEA

Budget Committee

By law, the budget committee is charged with preparing a budget for the operational and administrative expenses of the ESD. ~~making recommendations concerning financial priorities.~~ The budget committee will have the responsibility for reviewing the financial program of the Lane ESD, reviewing the proposed ESD budget as presented by the superintendent and recommending an annual ESD budget in keeping with the provisions of applicable state laws.

Educational policy decisions, ~~however,~~ are the responsibility of the Board, not the budget committee. The committee does not have the authority to add programs or to approve additional personnel or increase salaries. While the committee may, in effect, delete programs because of a fund decrease ~~in arriving at a levy figure,~~ the committee is charged primarily with a fiscal evaluation of programs. The committee may, alternatively, ~~set~~ **recommend** an amount that changes the ~~recommended~~ **proposed** budget and may request the administration make such changes in accordance with priorities set by the Board.

The following will govern the make-up and process of establishing the ESD's budget committee:

1. The budget committee consists of the **seven** elected Board members and eight members appointed by the Board from component school district boards or designees of component district Boards. The members appointed by the Board shall consist of five members selected by ESD zone and three members selected at large. To be eligible for appointment, the appointive member must:
 - a. Live and be registered to vote within the ESD and, if a zone representative, must live within the appropriate zone;
 - b. Not be an officer, agent or employee of the ESD.
2. No budget committee member may receive any type of compensation from the ESD. Reimbursement of budget committee expenses shall be in accordance with Board policy and administrative ~~rule~~ **regulation BHD/BHD-AR.**
3. ~~In~~ **At its August meeting,** the Board will identify vacant budget committee positions which must be filled by appointment of the Board. The Board will announce the vacancies and receive recommendations of interested members of component school district Boards or designees of component district boards. Candidates for vacant positions must reside in the vacated zone. At-large vacant positions will be filled from among members of component school district Boards or designees of component district boards.
4. **At its September meeting,** ~~the~~ **the Board will** appointive budget committee members ~~will be appointed~~ for three-year terms ~~in the September meeting.~~ The terms will be staggered so that approximately one-third of the appointive members' terms end each year. The Board may appoint budget committee members to as many consecutive terms as deemed appropriate. If any appointive member is unable to complete the term for which ~~he/she was~~ **they were** appointed, the Board will announce

the vacancy at the first regular Board meeting following the committee member's resignation or removal. An appointment to fill the position for its unexpired term will be made at the next regular Board meeting.

Budget Committee Responsibilities

The following items explain the budget committee responsibilities:

1. At its first meeting after appointment, the budget committee will elect a presiding officer from among its members ~~at the first meeting~~. It may also establish ~~such~~ other ground rules as necessary for successful operation of the committee;.
2. A majority of the constituted committee is required for passing an action item. Majority for a 15-member budget committee is 8. Therefore, if only eight 8 members are present, a unanimous vote is needed for passing an action;.
3. As provided by law, the committee will hear the budget message presented by the superintendent, receive the budget document, listen to comments and suggestions by patrons and announce the time and place for its future meetings. All meetings of the budget committee are open to the public;.
4. The budget committee shall hold one or more meetings to receive the budget message, the budget document and to provide members of the public with an opportunity to ask questions about and comment on the budget document. The budget officer shall announce the time and place for all meetings, as provided by law. All meetings of the budget committee are open to the public. Minutes shall be taken, made available and retained in accordance with the Public Meetings Law;.
5. The budget committee may request any information used in ~~for~~ the preparation ~~or revision~~ of or for revising the budget document from ~~any ESD officer or employee~~ the superintendent or business manager. ~~It~~ The committee may request the attendance of any employee at its meetings; ~~S~~ such requests by the budget committee should be made through the superintendent and/or budget officer. The budget committee will approve the budget document as submitted by the superintendent or as subsequently revised by the committee;.
6. After approval of the original or revised budget document, the budget committee's duties cease. The hearing on the approved budget is held by the Board.

END OF POLICY

Legal Reference(s):

[ORS 174.130](#)
[ORS 192.610 to -192.695](#)

[ORS 294.305 to -294.456](#)
[ORS 334.240](#)

[OAR 581-024-0262](#)

Lane Education Service District

Code: DBG/DBH
Adopted: 6/27/00
Revised/Readopted: 12/11/01
Orig. Code(s): DBG/DBH

Budget Hearing and Budget Adoption Procedures

After the budget document has been approved by the budget committee, a public hearing will be held regarding the budget document. The date, time and place will be determined by the Board. At the hearing, any person may speak for or against items in the budget document.

After the public hearing on the budget and any modifications of the budget deemed necessary as a result of that hearing, the Board will approve the proper resolutions to adopt and appropriate the budget. The Board will further determine, make and declare the ad valorem property tax amount or rate to be certified to the assessor for the ensuing year, and itemize and categorize the ad valorem property taxes.

The superintendent will ensure all necessary documentation is submitted to the county assessor's office as required by the Local Budget Law.

END OF POLICY

Legal Reference(s):

~~ORS 192.610–192.710~~

~~ORS Chapter 255~~

~~ORS 294.305–294.565~~

ORS 192.610 to -192.710

ORS Chapter 255

~~ORS 310.060~~

~~ORS 328.715–328.745~~

~~ORS 334.350~~

ORS 294.305 to -294.565

ORS 310.060

~~OAR 150-310.060 (A)~~

ORS 334.240

OAR 150-310-0020

Lane Education Service District

Code: DBI
Adopted: 12/11/01
Orig. Code(s): DBI

Budget Amendment Procedures

The budget estimates and proposed ad valorem property tax amount or rate of any fund as shown in the budget document may be amended by the Board prior to adoption. Such amendment may also be made following adoption if the amendments are adopted prior to the commencement of the fiscal year to which the budget relates.

The amount of estimated expenditures for each fund in an annual budget, ~~however~~, shall not be increased by more than \$5,000 or 10 percent of the estimated expenditures, whichever is greater.

The ad valorem property tax amount or rate to be certified shall not exceed the amount approved by the budget committee, unless the amended budget document is republished and another public hearing is held as required by law.

END OF POLICY

Legal Reference(s):

[ORS 294.456](#)

[ORS 294.471](#)

[ORS 294.473](#)

Lane Education Service District

Code: DBJ
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBJ

Budget Implementation

The ESD budget, ~~as adopted by the Board~~, becomes the financial plan of Lane ESD for the ~~coming~~ ~~year~~ ensuing budget period when adopted by the Board. The Board, through its superintendent, has authority and exercises control over all funds and expenditures of the ESD.

The superintendent and staff are authorized to make expenditures and commitments in accordance with the policies of the Board and the adopted ESD ~~approved~~ budget.

The superintendent will make the Board aware of any substantial changes in expected revenues or unusual expenditures so the Board may adjust the budget, if necessary.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS Chapter 310](#)

Lane Education Service District

Code: DBK
Adopted: 5/24/94
Revised/Readopted: 12/11/01; 7/13/10
Orig. Code(s): DBK

Budget Transfer Authority

The adopted ESD budget is a financial plan which may be subject to change as a result of circumstances or events occurring during the ensuing budget period. All appropriation transfers shall be authorized when completed by official resolution of the Board. The authorizing resolution must state the need for the transfer, its purpose and the amount of the transfer.

Transfers of general operating contingency appropriations which in aggregate during a fiscal year or budget period exceed 15 percent of the total appropriations of the fund may be made only after the adoption of a supplemental budget prepared for that purpose.

The [superintendent] has the authority to approve transfers between programs (i.e., elementary, middle school, high school) and/or object codes (i.e., 100-salaries, 200-benefits, 300-purchasing service, 400-supplies, etc.) within the same appropriation.

END OF POLICY

Legal Reference(s):

[ORS 294.450](#)463

Lane Education Service District

Code: DC
Adopted: 3/29/94
Readopted: 12/11/01
Orig. Code(s): DC

Borrowing Funds

The Board may authorize borrowing funds for the purpose of meeting current expenses and other legal expenditures when provision has been made for such expenditures in the adopted budget in accordance with Local Budget Law.

END OF POLICY

Legal Reference(s):

[ORS 294.443](#)

[ORS 328.565](#)

Lane Education Service District

Code: DD
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DD

Grant Funding Proposals and Applications

Lane ESD shall pursue federal, state or private grants or other such funds that will assist the ESD in meeting adopted Board and ESD goals.

Proposals for external funds will be submitted to the Board for evaluation and approval.

In the event an opportunity arises to submit a grant proposal and there is insufficient time to place it before the Board, the superintendent is authorized to use ~~their~~ ^{his/her} judgment in approving it for submission. The superintendent will review the proposal with the Board at its next regular meeting. The Board reserves the right to reject funds associated with any grant which has been approved.

The Board shall, before an acceptance of such funds, consider the district's obligations, expectations or encumbrances when the grant ceases.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 334.125\(7\)](#)

Lane Education Service District

Code: DDA
Adopted: 12/11/01
Revised/Readopted: 2/28/06; 10/28/08
Orig. Code(s): DDA

Local Service Plan

The ESD will provide services to component school districts in accordance with a local service plan developed by the ESD and component school districts. The plan must be adopted by the Board and developed to meet the following ESD service goals:

1. Assist component school districts in meeting the requirements of state and federal law;
2. Improve student learning;
3. Enhance the quality of instruction provided to students;
4. Provide professional development to component school district employees;
5. Enable component school districts and district students to have equitable access to resources; and
6. Maximize operational and fiscal efficiencies for component school districts.

A local service plan must contain annual performance measures for the ESD. The local service plans must also include services as required by state and federal law, and in the following areas:

1. ~~Special Needs~~ Students with Special Needs:

The local service plan must include programs for children with special needs, including special education services and, services for at-risk students, and professional development for employees who provide those services.

2. Technology Support:

The plan shall include technology support for component school districts and individual technology plans for each district. The ESD will provide technology infrastructure services, data services, instructional technology services, and distance learning, and professional development for employees who provide technology services.

3. School Improvement Services:

The local service plan will include school improvement services for component school districts, including the following:

- a. Services designed to support component school districts in meeting the requirements of state and federal law;
- b. Services designed to allow the ESD to participate in and facilitate a review of the state and federal standards related to the provision of a quality education by component school districts;

- c. Services designed to support and facilitate continuous school improvement planning;
- d. Services designed to address school-wide behavior and climate issues;
- e. ~~Services designed to support career~~ **Professional** technical education; and
- f. Professional development for employees who provide school improvement services.

4. Administrative and Support Services:

Local service plans must include administrative and support services for component school districts, including services designed to consolidate component business functions, liaison services between the Department of Education and component school districts and registration of children being taught by private teachers, parents or legal guardians.

- 5. Other services: ~~R~~ required under ORS 339.005 ~~to~~ 339.090 or services designed to meet regional needs.
- 6. An ESD may provide entrepreneurial services and facilities to non-component school district and other public and private entities pursuant to ORS 334.185.

An ESD may provide the services required by the local service plan in cooperation with another ESD, with a school district or contract with a private or public entity for services.

Following the adoption by the ESD Board, ~~local~~ **Local** service plans shall be ~~approved~~ **agreed upon** on or before March 1 by resolution of at least two-thirds of the eligible component school boards which have a majority of the students enrolled in the ESD.

Prior to June 30 of each year the ESD shall submit to the Department of Education the adopted local service plan of the ESD. ~~The local service plan shall be part of the Annual Report submitted to the Department.~~

END OF POLICY

Legal Reference(s):

[ORS 334.005\(4\)](#)
[ORS 334.175](#)

[ORS 334.177](#)
[ORS 334.185](#)

[ORS 339.005 to-339.090](#)
[OAR 581-024-0285](#)

Lane Education Service District

Code: DE/DEB/DEC
Adopted: 2/22/94
Readopted: 12/11/01
Orig. Code(s): DE/DEB/DEC

Revenues from State and Federal Sources

The Board may authorize, accept and use state or federal funds available to Lane ESD to carry out ESD educational programs. The ESD will comply with all regulations and procedures required for receiving and using such funds.

END OF POLICY

Legal Reference(s):

[ORS 294.305 - 294.565](#)
[ORS 334.125](#)

[ORS 332.107](#)

Lane Education Service District

Code: DFA
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DFA

Investment of Funds

The Board ~~may authorize~~ **authorizes** the investment ~~or reinvestment~~ of funds which are not immediately needed for the operation of Lane ESD. Such investments will comply with ~~State~~ **state** law and Oregon Administrative Rules.

The superintendent and director of business services will develop criteria for the appropriate investments of ESD funds. A progress ~~and~~ report ~~of investments will be made~~ **this** to the Board on a regular basis.

END OF POLICY

Legal Reference(s):

[ORS 294.033](#)
[ORS 294.035](#)

[ORS 294.125](#)
[ORS 294.135](#)

[ORS 294.145](#)
[ORS 294.155](#)

Lane Education Service District

Code: DFA-AR
Adopted: 12/11/01
Revised/Readopted: 12/07/04; 2/28/06
Orig. Code(s): DFA-AR

Investment of Funds

These regulations are issued for the guidance of the portfolio manager in the day-to-day operation of the investment program.

These regulations apply to activities of the portfolio manager with regard to investing the financial assets of all excess funds of the **ESD district** including the General Fund, Special Revenue Funds, Capital Project Funds, Internal Services Funds and any and all Trust and Agency Funds under the control and direction of the **ESD district**.

The portfolio manager will routinely and actively monitor the contents of the investment portfolio, the available markets and the relative values of competing investments and will adjust the portfolio accordingly. The portfolio manager, acting in accordance with these procedures and exercising due diligence, shall not be held personally responsible for a specific security's credit risk or market price changes, provided that these deviations are reported as soon as practical and that appropriate action is taken to control adverse developments.

All investments will be carried at cost. Gains or losses from investments will be credited or charged to investment income at the time of sale. Premiums or discounts on securities may be amortized over the life of the security.

Diversification of Maturity

1. The **ESD district** shall attempt, to the maximum extent possible, to match investment maturity schedules with anticipated cash flow requirements. In no event, unless specifically matched to specific requirements such as bond sinking funds or reserves, will the **ESD district** invest in securities having a maturity more than 18 months from the date of purchase.
2. Investment maturities for operating funds shall be scheduled to coincide with projected cash flow needs.
3. In determining the amount of excess funds available for investment purposes, the portfolio manager will maintain cash flow projections and schedules as well as a historical record of expenditures and receipts. These forecasts and schedules will be reviewed and updated as required to reflect actual conditions as they exist.

Qualified Institutions for Investment Purchases

1. The **ESD district** shall evaluate each financial institution (as used herein, the term is meant to include brokers/dealers) from whom it purchases investments as to financial soundness at least once annually. Investigation may include review of the most recent Consolidated Report of Condition ("call" report), rating reports, financial statements as well as analysis of the particular institution's management, profitability, capitalization and asset quality.
2. Any financial institution with whom the **ESD district** wishes to do business shall provide financial data at the request of the portfolio manager. The information will be reviewed by the portfolio manager who will decide on the soundness of the institution before adding that institution to those

that are on the approved qualified institution list for the **ESDdistrict**. The **ESDdistrict** reserves the right to be selective and to add or delete institutions from the approved list at will.

3. The portfolio manager will maintain a qualified institution list. A financial institution must be on this approved list prior to transacting any business with the **ESDdistrict**. A basic requirement for inclusion on the approved listing is a capital adequacy ratio in excess of 120 percent (1.2 to 1).
4. All approved financial institutions must be chartered in Oregon and insured by either the **Federal Deposit Insurance Corporation (FDIC)** ~~or FSLIC~~.
5. Brokers or dealers not affiliated with a bank shall have offices located in Oregon, be classified as reporting dealers affiliated with the New York Federal Reserve Bank as primary dealers, or be required to meet capital adequacy requirements.

Diversification of Instrument of Investment

1. The portfolio manager will diversify the investment portfolio to avoid incurring unreasonable risks inherent in overinvesting in specific instruments, individual institutions or maturities.
2. Time certificates of deposit: In purchasing a time certificate of deposit (TCD), the portfolio manager will not invest an amount which is more than 10 percent of the total deposits of any single institution. As required by Oregon Revised Statutes, the portfolio manager will be responsible to ~~ensure~~ **for ensuring** that a Certificate of Participation has been presented by the issuing institution to cover any outstanding TCD above the statutory level of insurance provided by FDIC/FSLIC. The **ESDdistrict** will always require full collateralization on all TCD investments.
3. Banker's acceptances: All banker's acceptances (BA's) will be purchased from an Oregon chartered financial institution.
4. Repurchase Agreements: All repurchase agreements will be collateralized 110 percent by U.S. Government or Agency obligations. All collateral will be held by a third party for safekeeping. A signed repurchase agreement will be obtained from the issuing institution.
5. U.S. Treasury Obligations: No limits on purchase.
6. U.S. Government Agency Securities: No limits on purchases other than limit on concentration of 25 percent in any one type issue.
7. Local Government Investment Pool (**LGIP**): The LGIP limits investment to accounts not to exceed the inflation-adjusted maximum under **Oregon Revised Statute (ORS) 294.810**. Other than this limitation, there is no limit to the amount that can be invested in the pool, although the pool does not collateralize or deliver investment instruments.
8. Diversification Guidelines: Investments will be consistent with statutory requirements under ORS 294.035 and Oregon Short Term Fund rules and recommendations.

Lane Education Service District

Code: DFH
Adopted: 6/28/94
Revised/Readopted: 12/11/01
Orig. Code(s): DFH

Media Production Services

(Is this still needed? Also, this does not really rise to the level of board policy; this looks like internal procedures.)

Graphics and printing services may be provided by Lane ESD and conducted in accordance with applicable copyright laws. If permission is needed for the completion of a project, it is the responsibility of the person making the request to obtain permission from the copyright holder, prior to ESD printing.

Graphics and printing services price lists, including related charges for consultive services provided by Lane ESD staff, will be maintained by the ESD. The graphics and printing price list will be reviewed and updated as necessary, subject to superintendent or designee approval. Prices quoted to users may be calculated to assure that all costs to the ESD are reimbursed.

All billing shall be conducted in accordance with fiscal procedures and responsibilities as established by the ESD.

END OF POLICY

Legal Reference(s):

[ORS 190.003 - 190.110](#)
[ORS 294.305 - 294.520](#)

[ORS 334.125 \(6\)](#)

[OAR 581-024-0280](#)

Lane Education Service District

Code: DG
Adopted: 2/22/94
Readopted: 12/11/01
Orig. Code(s): DG

Depository of Funds

The Board will, at its annual organizational meeting in July or at other times deemed necessary by the Board, designate one or more banks or other financial institutions which meet Lane ESD, state and federal guidelines as official depositories for ESD funds.

END OF POLICY

Legal Reference(s):

[ORS 294.805 to -294.895](#)

[ORS 328.441](#)

[ORS 328.445](#)

Lane Education Service District

Code: DGA/~~DGB~~
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DGA/DGB

Authorized Signatures

The Board will, at its annual organizational meeting in July or at other times deemed necessary by the Board, authorize the Lane ESD clerk and/or director of business services to sign ESD checks. The Board may authorize the use of facsimile signatures by those persons authorized to sign ESD checks.

END OF POLICY

Legal Reference(s):

[ORS 294.120](#)

[ORS 328.441](#)

[ORS 328.445](#)

Lane Education Service District

Code: DH
Adopted: 2/22/94
Revised/Readopted: 12/11/01; 10/22/13
Orig. Code(s): DH

~~Bonded Employees and Officers~~ Loss Coverage

~~All ESD employees responsible for funds, fees, cash collections or inventory control will be bonded to protect the ESD against loss in an amount determined by the Board and upon recommendation of the ESD's agent of record. In compliance with Oregon statutes and administrative rules, the superintendent and director of business services will have individual fidelity bond coverage or equivalent crime coverage. The ESD will pay the cost of such coverage.~~

The Board and designated ESD employees are responsible to safeguard the ESD against loss regarding funds, fees, cash collections and inventory. The Board shall designate the ESD employees responsible as custodians of such items. The ESD shall purchase bond coverage or equivalent crime coverage in an amount determined by the Board, in consultation with the ESD's agent of record. The ESD will pay the cost of such coverage.

END OF POLICY

Legal Reference(s):

[ORS 328.441](#)

[ORS 334.125\(7\)](#)

[ORS 332.525](#)

[OAR 581-024-0240](#)

Lane Education Service District

Code: DI
Adopted: 2/22/94
Revised/Readopted: 12/11/01; 8/27/02
Orig. Code(s): DI

Fiscal Accounting and Reporting

Lane ESD's accounting and reporting system will be in accordance with generally accepted accounting procedures and will conform with state laws and regulations.

The superintendent and director of business services will develop fiscal procedures and responsibilities which will be distributed to staff members.

END OF POLICY

Legal Reference(s):

[ORS 294.305 - 294.565](#)

[OAR 581-023-0035](#)

Program Budgeting and Accounting Manual, Oregon Department of Education ~~(2000)~~.

Lane Education Service District

Code: DI-AR(1)
Adopted: 11/22/95
Revised/Readopted: 12/11/01
Orig. Code(s): DI-AR(1)

Budget Development

(This would generally not rise to the level of an AR; rather internal procedures.)

1. The director of each ESD service area is responsible for planning, data collection and development of the division's budget proposal.
 - a. The director is expected to reflect the outcomes of program evaluations, needs assessments and advisory committee deliberations in budget proposal development.
 - b. The director shall submit all new program proposals for the superintendent's consideration and reaction prior to development as a service area budget.
 - c. The director shall involve service area staff in developing the service area's budget proposal; responsibility may be delegated to the extent the director believes appropriate. The director is responsible for the service area's budget proposal.
2. The superintendent is responsible for determining which elements of service area budget proposals will be included in the budget submitted to the ESD budget committee.
 - a. The superintendent should at an early date give service area directors a clear indication of the "budget climate" as he/she interprets it, including the potential impact of such factors as program evaluations, educational trends, legislative influences and the like.
 - b. The superintendent will consider in deliberating on service area budget proposals the needs and desires expressed by the ESD's constituency and the data which supports those needs and desires.
3. The director of business services is responsible for assembling service area budget proposals into the appropriate budget document format.
 - a. The director of business services should take steps to ensure that accuracy and consistency are achieved in the use of Handbook II Revised account system and numbers.
 - b. The director of business services should take steps to ensure that supportive information and data is prepared in consistent, readily-understood format and composition.
 - c. The director of business services should ensure that other employees who are extensively involved in preparation of the budget document are kept informed and involved so that they can adequately plan their parts of the process.

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Lane Education Service District

Code: DI-AR(2)
Adopted: 11/22/95
Revised/Readopted: 12/11/01
Orig. Code(s): DI-AR(2)

Budget Administration Responsibility

(This would generally not rise to the level of an AR; rather internal procedures.)

1. The director of each ESD service area is responsible for administering the budget for the service area and for overseeing the activities of service area employees who participate in the fiscal process.
 - a. It is the responsibility of the director to determine that budgeted funds are used only for the purposes for which they were budgeted, that expenditures do not exceed funds available for the budgeted purposes and that expenditures are limited to necessary and justified transactions.
 - b. It is the responsibility of the director to carefully plan and delegate staff involvement in fiscal processes and to supervise that involvement to ensure responsible, accurate participation.
2. The director of business services of the ESD is responsible for operation of the accounting procedures, including receipt of ESD revenues, payment of valid, authorized claims against ESD funds and record keeping and financial reporting processes.
 - a. The director of business services should report in writing any unsound or illegal fiscal practices or the failure of any employee to carry out fiscal procedural responsibilities to the superintendent and the director of the division involved.
 - b. The director of business services of the ESD is responsible for overseeing the financial statements.

A reconciliation of funds report shall be used for reconciling and balancing the receipt of revenues and disbursement of all ESD funds.

- (1) Record of Cash Received: The sources of entries on the bank deposits shall have duplicate copies made and be attached to each deposit. The cash received as shown by each deposit shall be entered into the accounts receivable automated system and reports will be generated with matching balances. Each deposit will have the following supporting documentation:
 - (a) A duplicate copy of bank deposit;
 - (b) Copy of checks and stubs, if available;
 - (c) Copy of posting report with corresponding balance of deposit;
 - (d) A batch entry sheet will be prepared for each deposit showing the proper distribution account codes.
- (2) Record of Checks Drawn: Accounts payable disbursements are entered into the accounts payable system via balanced batches. After all batches for each check run have been entered into the system, the batches are posted. Check registers and accompanying reports are printed and are filed in binders per month for a full year. After each transaction/posting to the financial statement is made, statistics are checked to make sure

funds are in balance. When invoices are paid, copies of the invoice, receiving information and check are filed in a paid file.

D

(3) Procedure at the Close of the Month: At the end of each month, financial reports showing assets, liabilities, revenues and expenditures are printed and distributed. The fund balances on the reports and bank balances are reconciled, thereby assuring that the ESD financial statements and bank balances are reconciled.

(4) Reconciling the Bank Account: The bank statement shall be compared with cancelled checks and duplicate deposit slips.

Cancelled checks shall be filed with bank statements and kept for a period of seven years, then destroyed.

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3. The superintendent is ultimately responsible to the ESD Board for administration of the ESD budget. In keeping with this responsibility, he/she is responsible to remain informed of any changes in statutory fiscal requirements and reserves the ultimate decision regarding the obligation and expenditure of ESD funds consistent with necessary Board action in this regard.

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Lane Education Service District

Code: DIA
Adopted: 2/22/94
Readopted: 12/11/01
Orig. Code(s): DIA

Uncollectible Debts

(This does not look to rise to the level of board policy; rather an internal procedure.)

Lane Education Service District shall make systematic and reasonable efforts to collect monies owed to the ESD. The Board authorizes the administration to develop the appropriate procedures for the implementation of this policy.

END OF POLICY

Legal Reference(s):

[ORS 294.305 - 294.565](#)

[OAR 581-023-0035](#)

Program Budgeting and Accounting Manual, Oregon Department of Education (2000).

Lane Education Service District

Code: DIA-AR
Adopted: 3/14/94
Revised/Readopted: 12/11/01
Orig. Code(s): DIA-AR

Uncollectible Debts

(Consider this is an internal procedure)

The accounting supervisor has the responsibility to assure reasonable efforts are made to collect all monies due Lane ESD. The accounting supervisor will assure a record is maintained of all unpaid invoices. Invoices more than 30 days old will cause the business office to send follow-up letters or billings and/or make telephone contacts. Copies of the communication will be maintained.

Where these procedures have been carried out and the accounts are 12 months or more past due, the director of business services shall submit these accounts to the superintendent with one or more of the following recommendations:

1. Write off the account as uncollectible;
2. Refer to a collection agency;
3. Initiate the garnishment of wages;
4. Keep the account open and make further efforts internally to collect the monies due, including the assessment of interest on the unpaid balance.

Lane Education Service District

Code: DIC
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DIC

Financial Reports and Statements

The Board will receive monthly financial reports that include estimates of expenditures for the major general fund accounts in comparison to budget appropriations, actual receipts in comparison to budget estimates and the ESD's overall cash condition. Supplementary reports on other funds or accounts will be furnished upon request of the Board or superintendent.

The Board [will] [may] receive a preaudit report from the [ESD's auditor] [business manager] recapping the year-end closure of financial statements prior to the annual audit.

Appropriate staff ~~member(s)~~ will be available at any Board meeting, upon the Board's request, to respond to questions and to present current financial information. The superintendent will notify the Board at any time of substantial deviations in the anticipated revenues and/or expenditures.

END OF POLICY

Legal Reference(s):

[ORS 294.155](#)

[ORS 294.311](#)

[ORS Chapter 297](#)

[ORS 328.465](#)

[ORS 334.125](#)

[OAR 162-010-0000 to -0330](#)

[OAR 162-040-0000 to -0160](#)

[OAR 581-023-0037](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.

Lane Education Service District

Code: DID
Adopted: 10/26/99
Revised/Readopted: 12/11/01
Orig. Code(s): DID

~~Property Records and Inventory~~

(Any changes in practice?)

~~The Board recognizes that efficient management and effective provision for full replacement upon loss requires accurate inventories and properly maintained records of all equipment and properties, whether located in the ESD central office or at other ESD program sites.~~

~~The intent of this policy is to provide for an accurate inventory and properly maintained records of all ESD equipment and property.~~

The ESD will maintain an inventory of all fixed assets in accordance with governmental accounting standards. The ESD's inventory will be updated [annually] to include property newly purchased and disposed.

The inventory of all capitalized items will be maintained in accordance with the procedures required by auditing standards and will be utilized to determine replacement value for insurance purposes.

Inventory records for items owned or leased by the ESD which have a value less than the capitalization level and which otherwise would be defined as equipment will be maintained by each service area director in accordance with procedures to be established by the superintendent.

Definitions as used in auditing standards are as follows:

1. Cost: The original acquisition price of an asset. The cost includes installation cost paid, freight, taxes and related costs;
2. Specific asset (control asset): An item with a value greater than the capitalization level that is a distinct unit of property such as desks or typewriters;
3. Building improvements: The replacement or major renovation of existing building elements such as carpets, air conditioners, new roof. Items not included are repairs to maintain the condition of an asset and cost less than \$5,000;
4. Class items: Items that are individually under the capitalization level but when combined are over the limit and meet the equipment definition;
5. Capitalization level: The minimum dollar amount to capitalize. The capitalization level for Lane ESD shall be \$5,000;
6. Leased assets: Assets being purchased under a lease purchase where title to the assets may pass to the ESD at the end of the lease. If an item is acquired in installments, the total of the installments less interest is to be used to determine if the item should be capitalized;

7. Equipment is defined as follows:

- a. It has anticipated useful life of more than one year;
- b. It is of significant value (\$5,000 minimum except for certain class items);
- c. It retains its original shape and appearance with use;
- d. If damaged it is usually more feasible to repair it than to replace it;
- e. It does not lose its identity through incorporation into a different or more complex unit.

The superintendent or designee shall ~~periodically cause to be conducted~~ a complete inventory ~~by physical count~~ of all ESD-owned equipment and properties.

The superintendent or designee shall maintain a system of property records which shall include all descriptive matter required by law and by commonly accepted auditing standards.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.

Lane Education Service District

Code: DIE
Adopted: 2/22/94
Revised/Readopted: 12/11/01; 12/13/11
Orig. Code(s): DIE

Audits

An audit of all Lane ESD accounts will be made annually by an ~~authorized municipal~~ accountant selected by the Board from the roster of authorized municipal accountants maintained by the State Board of Accountancy. The audit examination will be conducted in accordance with minimum auditing standards ~~for audits of Oregon municipal corporations as~~ established by the Secretary of State.

The annual audit of the ESD financial records and accounts will include all funds under the ESD's control.

A copy of the audit report will be presented [first to the ESD's audit committee and then] to the Board. The superintendent will submit a copy of the audit report to the Oregon Department of Education and to the Oregon Secretary of State, Audit Division.

[Every [three] years the Board will review the contract with the audit firm and, if necessary, solicit request for proposals from authorized municipal accountants.]

Additionally, Lane ESD shall ensure that component districts conduct an annual audit. Lane ESD will assist component districts, as required, to meet budgeting, accounting and audit requirements. A file of component ~~school~~ district audits will be maintained by the ESD.

END OF POLICY

Legal Reference(s):

[ORS 294.155](#)
[ORS 297.405 to -297.555](#)
[ORS 297.990](#)

[ORS 334.125](#)
[ORS 334.240](#)

[OAR 581-023-0037](#)
[OAR 581-024-0206\(3\)\(b\)](#)
[OAR 581-024-0265](#)

Lane Education Service District

Code: DJ
Adopted: 5/24/94
Revised/Readopted: 12/11/01; 8/27/02; 3/21/06
Orig. Code(s): DJ

District Purchasing

~~Purchase of goods or services shall be made in accordance with Oregon Revised Statutes, Chapter 279 and Oregon Administrative Rules Chapter 125 (Department of Administrative Services Public Contract Review Exemption Rules).~~

The function of ESD ~~district~~ purchasing is to ~~provide~~ ~~serve the educational program by providing~~ the necessary supplies, equipment and services for the operation of the ESD. Items commonly used ~~in the ESD programs~~ will be standardized and be ~~whenever~~ consistent with ESD ~~educational~~ goals and in the interest of efficiency or economy. The superintendent [or designee] shall supervise the purchases of all service areas. Service area directors shall exercise prudence in purchases and ensure that standard accounting procedures are followed for the expenditures.

The [director of business service] is appointed by the Board to serve as purchasing agent. The [director] will be responsible for developing and administering the ESD's ~~district's~~ purchasing program.

No obligation may be incurred by any officer or employee of the Board unless that expenditure has been authorized in the budget, by Board action and/or Board policy. In all cases calling for the expenditure of ESD money, except payroll, a requisition and purchase order system must be used.

All persons, firms or corporations supplying goods, materials, equipment or service of any kind to Lane ESD shall certify in writing on all bids for contracts that each, as a contractor with the ESD, will not discriminate against any employee or applicant for employment because of race, color, national origin, religion, sex, gender identity, age, marital status, sexual orientation or disability including discrimination on such basis of any other persons with whom the individual associates.

The Board delegates to the superintendent responsibility of purchases which are within the budget. Purchases of goods or services which are not planned for within the budget or exceed the budget amount must be approved by the Board.

The superintendent or designee is authorized to enter into and approve payment on contracts obligating district funds for products, materials, supplies, capital outlay and services that are within current budget appropriations. The Board shall approve all contracts that are collective bargaining agreements or service contracts that include the provision of labor performed by ~~district~~ ESD employees, such as custodial, food service and transportation services. Service area directors shall exercise prudence in purchases and ensure that standard accounting procedures are followed for the expenditures.

No Board member, officer, employee or agent of this ESD ~~district~~ shall use or attempt to use ~~their~~ ~~his/her~~ official position to obtain financial gain or for avoidance of financial detriment for ~~themselves~~ ~~himself/herself~~, a relative or ~~for any business with which the Board~~ member of their household, or for any business with which the Board member, relative or member of household ~~or a relative is~~

associated. [Acceptance of any gratuities, financial or otherwise, from any supplier of materials or services to the ESD by any Board member, officer or employee of the ESD is prohibited.]

END OF POLICY

Legal Reference(s):

[ORS 244.040](#)

[ORS 279A](#), [279B](#) and [279C](#)

[ORS 294.311](#)

[ORS 328.441 to -328.470](#)

[ORS 334.125](#)

[ORS 659.850](#)

[OAR 125-055-0040](#)

Lane Education Service District

Code: DJ-AR(1)
Adopted: 2/06/24
Orig. Code(s): DJ-AR(1)

Purchasing Procedures

The director of business services will oversee the development, maintenance, and annual review of detailed, written purchasing procedures and instructions. Regular updates will be provided on authorization and approval limits, contract authority, bidding requirements, and forms. The director of business services will provide guidance and training to programs conducting purchasing.

Authorization and Approval Limits

The only individual authorized by the board to sign documents that commit or obligate the ESD to pay for goods or services is the superintendent or designee (assistant superintendent or director of business services). All other staff are not authorized signers and should not sign any documents that legally bind the ESD for payment.

The superintendent will designate the employees who have authority to approve budgeted expenditures for specific program and department budgets. Procurements are authorized only when the following conditions are met:

1. The procurement is pre-approved by an appropriate director or manager with budget oversight and authority;
2. An adequate budget is confirmed for the procurement;
3. The procurement complies with all district purchasing policies and regulations.

Purchase Orders

In all cases calling for the expenditure of ESD funds (other than the exceptions noted below), a requisition and purchase order system will be used. A purchase order is a legally binding document issued from the ESD (as the buyer) to a vendor (as the seller) that ensures goods and services being purchased are accounted for effectively.

[The director of business services is authorized to issue all other purchase orders, contracts or agreements without prior approval of the Board where formal bidding procedures are not required by law and when current budget appropriations are adequate to cover such obligations.]

The director of business services will review bills due and payable for the purchase of supplies and services to determine if they are within current budget appropriations. After review, the director of business services will direct payment of the just claims against the ESD. The superintendent or designee and director of business services is responsible for the accuracy of all bills and vouchers.]

Exceptions from Purchase Orders

All procurements require an approved purchase order except for the following:

1. Credit card transactions;
2. Personal services contracts;
3. Staff expense reimbursements.

Lane Education Service District

Code: DJ-AR(1)
Adopted: 2/06/24
Orig. Code(s): DJ-AR(1)

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Exceptions from Purchase Orders

All procurements require an approved purchase order except for the following:

1. Credit card transactions;
2. Personal services contracts;
3. Staff expense reimbursements.

Lane Education Service District

Code: DJ-AR(2)
Adopted: 2/06/24
Orig. Code(s): DJ-AR(2)

Expenditure of Funds for Meals, Refreshments and Gifts

The ESD recognizes there may be occasions when it is appropriate for board members, directors and others to expend ESD funds in the course of conducting ESD business to provide meals or refreshments (e.g., bakery goods, snacks, fruit, punch, coffee, tea, soft drinks, etc.).

The purchase of gifts may also be approved, in certain situations. Such occasions may include, but are not limited to, various ESD and department level meetings, gatherings to celebrate ESD successes or recognize individual achievements, contributions or outstanding service to the ESD and other ESD and department sponsored activities.

The use of ESD funds, as used in this administrative regulation, means the use of money in any of the accounts of the ESD. Exceptions are funds collected from staff members or others for the specific purpose of providing gifts or parties; these funds must not be commingled with ESD accounts and are exempt from the following requirements.

Meals

ESD funds may be used to pay for individual or group meals only if official ESD business is being conducted during the time in which the meal is provided and only if the meal provides a particularly practical time or setting for the discussion consistent with board policy and the following:

1. Meals may be provided by the ESD to recognize the contributions of staff through retirement dinners or other recognition events;
2. Meals may be provided by the ESD as a part of board or administrative work sessions, at ESD or building-level committee meetings or other ESD-approved activities. In these cases, the following guidelines apply:
 - a. The cost of meals should not exceed the per diem meal allowance per person;
 - b. Food and drink items must be purchased in appropriate amounts for the number of attendees.
3. Meals not directly business related may be provided to staff or others at the individual's expense only.

Refreshments

Board members and ESD administrative staff may use ESD funds to provide refreshments for staff or other participants at meetings, in-service programs or other similar ESD or program-sponsored activities, subject to the following additional requirements:

1. The purchase of alcoholic beverages with ESD funds is strictly prohibited;
2. The use of ESD funds for parties (e.g., birthday celebrations, holiday celebrations, baby showers, etc.) is prohibited.

Gifts

There are numerous occasions that may arise whereby board members, directors or other ESD staff may feel the need to recognize employees (e.g., Administrative Professionals Day, classified employees' week, birthday, etc.). A board member, director or other ESD employee may provide such recognition at his/her expense only, unless as otherwise permitted below:

1. The ESD may provide a small token of appreciation for a board member's or employee's retirement and years of service and other related activities utilizing ESD funds, as approved in advance. For example, the board generally proclaims special recognition for classified and licensed employees' appreciation weeks;
2. Directors may use ESD funds to provide an appropriate token of appreciation on behalf of the board. The value of this item may not exceed \$50 per person;
3. Gift cards and gift certificates are treated as taxable wages by the IRS. The use of ESD funds to provide gift cards or certificates to employees is not permitted;
4. No other expenditure of ESD funds for gifts is permitted without prior authorization from the board or superintendent.

Lane Education Service District

Code: DJB
Adopted: 5/24/94
Revised/Readopted: 12/11/01
Orig. Code(s): DJB

Petty Cash Accounts

The Board authorizes the superintendent to establish petty cash funds in the amount determined necessary for effective operation by the superintendent but not greater than \$[250].

The superintendent shall designate a staff member to be responsible for management of petty cash funds. The designated person shall ensure that each request for funds is made in writing, signed by the requestor and accompanied by receipts; that the fund is not used to subvert the normal purchasing procedure; and that the petty cash box is secured daily.

END OF POLICY

Legal Reference(s):

[ORS 294.311](#)

OR. DEP'T. OF EDUCATION, PROGRAM BUDGET AND ACCOUNTING MANUAL.

Lane Education Service District

Code: DJC
Adopted: 2/22/94
Readopted: 12/11/01; 3/21/06; 2/23/10;
2/24/15
Orig. Code(s): DJC

Bidding Requirements (Version 1)

The Board declares its intention to purchase competitively without prejudice and to seek maximum educational value for every dollar expended. All public contracts for goods or services, personal or consulting services, or construction services shall be based upon competitive bids or proposals except:

1. Contracts between contracting agencies or between contracting agencies and the federal government;
2. Insurance and services contracts as provided for under state law;
3. Contracts for the procurement or distribution of textbooks;
4. Energy savings performance contracts;
5. Contracts made with qualified nonprofit agencies providing employment opportunities for disabled individuals;
6. Public improvement contracts exempted by the Local Contract Review Board (LCRB) upon findings that the award would not encourage favoritism or substantially diminish competition and would result in substantial cost savings and other substantial benefits to the contracting agency;
7. Emergency contracts;
8. Any other public contract specifically exempted from the code by another provision or law.

The Board will serve as the LCRB for the ESD. All ESD purchasing shall be conducted in accordance with the Board's adopted rules.¹

A copy of the Board's policy or resolution designating the Board as the LCRB for the ESD shall be filed with the county governing body.

The Board acting as its own LCRB, will adopt² the *Oregon Attorney General's Public Contracts Manual*, OAR Chapter 137, Division 046 through 049 Chapter 137, Division 046 through 049 in effect at the time

¹ The Board may contract with another public agency to serve as its LCRB.

² Public Contracts shall be governed by ORS Chapter 279, 279A, 279B and 279C. Additionally, the Board may, as provided by ORS 279A.065, adopt the Oregon Attorney General's Model Public Contract Rules, OAR Chapter 137 governing purchasing/bid procedures. The Board may also adopt the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125. The Board may adopt portions of those rules or adopt its own rules. A Board that has not

this policy is adopted. These rules govern purchasing procedures, and other matters subject to public contracting provisions of law.

The ESD shall procure the construction manager/general contractor services in accordance with model rules the Attorney General adopts under ORS 279A.065(3).

Additionally, the Board may include as part of its rules portions of the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125, Divisions 246 through 249 in effect at the time this policy is adopted.

Where necessary, the Board has made the written findings required by law for exemptions from competitive bidding. Such findings shall be maintained by the ESD and made available on request.

The ESD shall review its rules each time the Attorney General adopts a modification of the model rules, as required by ORS 279A.065 (5)(b), to determine whether any modifications need to be made to ESD rules to ensure compliance with statutory changes. Modifications will be made only following review by the ESD's legal counsel. New rules, as necessary, will be adopted by the Board. In the event it is unnecessary to adopt new rules, Board minutes will reflect that the review process was completed as required.

The Board recognizes that a public contracting agency that has not established its own rules of procedure as required by ORS 279A.065 (5) is subject to the model rules adopted by the Attorney General, including all modifications to the model rules that the Attorney General may adopt.

Public contracts, if awarded, will be awarded to the lowest, responsive and responsible bidder or the best, responsive and responsible proposer consistent with solicitation document provisions. The Board may reject in whole or in part, any bid or proposal not in compliance with all prescribed procedures and requirements and may reject for good cause any bid or proposal upon a written finding that it is in the public interest to do so. Such findings shall conform with criteria as specified by the *Oregon Attorney General's Public Contracts Manual*.

Opportunity will be provided to all responsible suppliers to do business with the ESD. The business services director will develop and maintain lists of potential vendors for various types of materials, equipment and supplies. Such lists may be used to develop a mailing list for distribution of specifications and solicitations for bids or proposals. Any supplier may be included in the list upon request.

Procurement estimated to be in excess of \$250,000 shall go through the cost analysis and feasibility process described in ORS 279B.

Records of bids, proposals and specifications will be kept in the ESD administration office and will conform with Oregon Revised Statutes and applicable records retention provisions of the *Oregon Attorney General's Public Contracts Manual*.

END OF POLICY

Legal Reference(s):

established its own rules of procedure for public contracts is subject to the model rules (OAR Chapter 137) adopted by the Attorney General.

[ORS Chapter 279](#)
[ORS Chapter 279A](#)
[ORS Chapter 279B](#)

[ORS Chapter 279C](#)
[ORS 670.600](#)
[OAR Chapter 125](#), Divisions 246 - 249

[OAR Chapter 137](#), Divisions 045 - 049
[OAR 459-005-0020](#)

[OREGON PROCUREMENT MANUAL](#), Oregon Department of Administrative Services.

Lane Education Service District

Code: DJC-AR
Revised/Reviewed: 7/28/09; 6/22/10; 2/24/15;
2/23/16; 8/11/16; 1/03/23
Orig. Code(s): DJC-AR

Special Procurements and Exemptions from Competitive Bidding (Version 1)

SPECIAL PROCUREMENTS

The ESD shall submit a written request to the Board, acting as the Local Contract Review Board (LCRB), that describes the contracting procedure, the goods and services or class of goods and services that are the subject of the special procurement and circumstances that justify the use of a special procurement under the standards as follows: the special procurement is unlikely to encourage favoritism in the awarding of public contract or to substantially diminish competition for public contracts and, (A) is reasonably expected to result in substantial cost savings to the district or to the public, or (B) otherwise substantially promote the public interest in a matter that could not practicably be realized by complying with requirements that are applicable under Oregon Revised Statute (ORS) 279B.055, 279B.060, 279B.065, 279B.070 or under any related rules. Public notice of the approval of a special procurement must be given in the same manner as provided in ORS 279B.055(4). If the district intends to award a contract through special procurements that calls for competition among prospective contractors, the district shall award the contract to the contractor it determines to be most advantageous to the district. When the LCRB approves a class special procurement the district may award contracts to acquire goods and services within the class of goods and services in accordance with the terms of the approval without making a subsequent request for a special procurement.

1. Brand Names or Products, “Or Equal,” Single Seller and Sole Source
 - a. The ESD may purchase brand names or products from a single seller or sole source without competitive bidding subject to the limitations of this rule.
 - b. Solicitation specifications for public contracts of the ESD shall not expressly or implicitly require any product of any particular manufacturer or seller except as expressly authorized in subsections c. and d. of this rule.
 - c. The ESD may specify a particular brand name or equal specification when the use of a brand name or equal specification is advantageous to the ESD, because the brand name describes the standard of quality, performance, functionality and other characteristics of the product needed by the ESD.
 - (1) The ESD is entitled to determine what constitutes a product that is equal or superior to the product specified, and any such determination is final.
 - (2) The ESD is not prohibited from specifying one or more comparable products as examples of the quality, performance, functionality or other characteristics of the product needed by the ESD.
 - (3) A brand name specification may be prepared and used only if the ESD determines for a solicitation or class of solicitations that only the identified brand name specification will meet the needs of the ESD based on one or more of the following written determinations:

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- (a) The use of a brand name specification is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts; or
 - (b) Specification of the brand name, mark or product would result in cost savings to the ESD; or
 - (c) There is only one manufacturer or seller of the product of the quality, performance or functionality required; or
 - (d) The efficient utilization of existing goods requires the acquisition of compatible goods and services.
- d. The ESD may award a contract for goods or services without competition when the LCRB determines in writing that the goods or services, or class of goods or services, are available from only one source. The determination of a sole source must be based on written findings that may include:
- (1) A brief description of the contract or contracts to be covered, including contemplated future purchases;
 - (2) Description of the product or service to be purchased; and
 - (3) The reasons the ESD is seeking this procurement method, which shall include any of the following:
 - (a) That the efficient utilization of existing goods requires acquiring compatible goods or services;
 - (b) That the goods or services required to exchange software or data with other public or private agencies are available from only one source;
 - (c) That the goods or services are for use in a pilot or an experimental project; or
 - (d) Other findings that support the conclusion that the goods or services are available from only one source.
 - (4) To the extent reasonably practical, the contracting agency shall negotiate with the sole source to obtain contract terms that are advantageous to the contracting agency.
- e. The ESD may specify a product or service available from only one manufacturer but available through multiple sellers after complying with subsection 1.c. above documenting the procurement file with the following information:
- (1) If the total purchase is over \$10,000 but does not exceed \$150,000, and a comparable product or service is not available under an existing Mandatory Use Contract, the district must obtain informal competitive quotes, bids or proposals and document this process in the procurement file;
 - (2) If the purchase does not exceed \$150,000, and the supplies or services are not available under an existing price agreement for information technology with competing products or Mandatory Use Contract, the district must first request and obtain prior written authorization from the LCRB to proceed with the acquisition.
 - (3) If the ESD intends to make several purchases of brand name-specific supplies and services from a particular manufacturer or seller for a period not to exceed five years, the district must so state this in the procurement file and in the solicitation document, if any, or a public notice of a solicitation. If the total purchase amount is estimated to exceed \$150,000, this shall be stated in the advertisement for bids or proposals.

Findings of Fact/Conclusion of Compliance with Law (OAR 125-247-0275)

The ESD shall submit a written request to the local contract review board that describes the contracting procedure, goods and services subject of the special procurement and the circumstances that justify the use of the special procurement.

- a. It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts and is reasonably expected to result in substantial cost savings to the district which could not be realized under ORS 279B.055, 279B.060, 279B.065 or 279B.070 as required by ORS 279B.085(4).
- b. Public notice of the approval must be given in the same manner as provided in ORS 279B.055(4).
- c. This rule requires the ESD to make a good faith effort to determine that no other sources are available for the specified products.
- d. The ESD maintains open lists from which vendors are contacted for quotations and utilizes electronic means of determining new vendors on an ongoing basis.
- e. The awarding of a contract as described in this special procurement should result in substantial cost savings by virtue of the ability to reduce solicitation costs when it is known that comparable products are not available, or when specifying another product solely to meet a competition requirement might lead to lower initial cost but longer lifetime cost.
- f. When the local review board approves a class special procurement the ESD may award contracts to acquire goods and services within the class of goods and services in accordance with the terms of the approval without making a subsequent request for procurement.

2. Advertising Contracts, Purchase of

- a. The ESD may purchase advertising in any media, regardless of a dollar amount, without competitive bidding.
- b. The Board, acting as the LCRB of the ESD must use competitive methods whenever possible to achieve best value and must document in the procurement file the reasons why a competitive process was deemed impractical and the resulting contract must be in writing.
- c. If the anticipated purchase exceeds \$10,000 and a competitive method is used, the ESD must post notice on the Oregon Procurement Information Network (ORPIN).

Findings of Fact

The ESD traditionally purchases advertising in newspapers. The following findings relate primarily to newspapers and written publications; however, the ESD may also purchase advertising for student activities or educational programs in other media, such as radio or television, where these findings apply:

- a. By their nature, media sources are generally unique. Advertisements are placed in a particular source because of the specific audience that source serves;
- b. Competition to furnish advertising space in daily newspapers of general, trade or business circulation in the vicinity of the ESD is limited;
- c. Cost savings are difficult to quantify where the sources are unique and not interchangeable;
- d. Advertisements may be placed to satisfy legal notice or Board policy requirements;
- e. Other published advertisements or notices, such as routine public notices, personnel recruitment information, etc., are placed in one or more of the publications of general circulation in the local area and other publications, as appropriate;

- f. The communities served by the ESD rely upon its use of the local daily newspaper as a central source of news and information regarding ESD activities;
- g. It is unknown whether contracts for advertisements placed with radio, television or other broadcast media are going to result in cost savings if not placed for competitive bid or request for proposal (RFP). If possible savings could be obtained through competitive means, the ESD would attempt to obtain competitive quotes or bids, as appropriate.

Conclusion of Compliance with Law

Due to limited competition and unique nature of sources, it is unlikely that this class special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. Further, any contracts awarded under this class special procurement would result in a cost savings available to the ESD where the ESD can achieve volume savings through contracts for advertising with a particular media source, or otherwise substantially promote the public interest.

2. Advertising Contracts, Sale of

The ESD may sell advertising for ESD publications and activities, regardless of a dollar amount, without competitive bidding, including school newspapers, yearbooks, athletic programs, drama or music programs and the like.

Findings of Fact

Sales of advertising for student activities are generally other fund revenues, where student groups solicit advertisements from local businesses to help with the cost of the activity itself. A common example is the sale of advertising in school newspapers and yearbooks. The circulation of the newspaper and yearbook is limited to the students, teachers, parents and interested members of the community associated with the activities of that particular school. Due to the limited circulation and audience, the businesses that participate by purchasing advertising do so partly in the spirit of good will. Any business is welcome to place an advertisement in the school newspaper or yearbook; all it needs to do is to contact any ESD school which publishes one. The ESD itself would not achieve any increased revenue to the General Fund by seeking competitive bids or proposals for such advertising. This holds true for other student activities, such as athletics, drama or music events and the like.

Conclusion of Compliance with Law

These findings indicate that it is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. Any business or individual who wishes to advertise in this manner may do so by simply contacting the student group responsible for the activity.

The sale of advertising for student activities such as school newspapers, yearbooks, athletic, drama or music programs would not benefit from competitive procurement. Such a requirement would place an unnecessary burden on the student group's activity and there is no financial advantage to the ESD in doing so. Consequently, the cost savings test is not an issue.

Equipment Repair and Overhaul

- a. The ESD may enter into a public contract for equipment repair or overhaul without competitive bidding, subject to the following conditions:
- (1) Service or parts required are unknown and the cost cannot be determined without extensive preliminary dismantling or testing; or
 - (2) Service or parts required are for sophisticated equipment for which specially trained personnel are required and such personnel are available from only one source; and
 - (3) The purchase is made within the limits and pursuant to the methods in subsection b. of this rule.
- b. The following limitations apply to this rule:
- (1) If the contract is less than or equal to \$150,000, the school or department shall submit in writing to the superintendent or designee the reasons why competitive bids or quotes are deemed to be impractical. The superintendent or designee will accordingly document in its procurement file and may enter directly into the contract;
 - (2) If the school or department official thinks the contract may exceed \$150,000, they shall submit in writing to the superintendent or designee the reasons why competitive bidding is deemed to be impractical and a description of the cost savings to be obtained by a special procurement. The superintendent or designee may prepare a specific request for the anticipated contract to be obtained through special procurement procedures to submit to the LCRB for approval.

Findings of Fact

The need for equipment repair or overhaul cannot be anticipated by district staff. If a piece of equipment is broken or not working properly, the ESD incurs cost of downtime, possible replacement equipment rental fees, staff time and other inconveniences or liabilities to its programs.

Generally, there are a limited number of vendors who are able to perform repair or overhaul on a particular piece of equipment because of its make or manufacture. Sophisticated equipment may require specially trained personnel available from only one source. Often, a piece of equipment will have a partial warranty in place which will guarantee some savings to the ESD in the parts and/or labor needed to do the repair or overhaul. This warranty savings may only be achieved if the original manufacturer or provider of the equipment performs the necessary repair or overhaul.

The dollar limits on the use of this special procurement procedure ensure that when the cost of the equipment repair or overhaul is expected to exceed \$150,000, the ESD will either seek formal competitive bids or, if that is not practical or cost effective, obtain a specific special procurement procedure from the LCRB to proceed with the purchase of the needed repair or overhaul.

Conclusion of Compliance with Law

It is unlikely that this special procurement procedure will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts because the dollar limits incorporated into this special procurement when the anticipated costs exceed \$150,000, insure the district will seek formal competitive bids and proposals. If the formal process is not practical, the

district will obtain a specific exemption from the LCRB to proceed with the purchase of the needed repair or overhaul.

The awarding of public contracts under this special procurement will result in a cost savings to the ESD, as required by ORS 279B.085, because the ESD incurs direct and indirect costs from the moment equipment breaks down or becomes unusable. This special procurement only applies to equipment already owned by the ESD and does not provide for the purchase of new equipment. The district must be able to purchase necessary services and parts as quickly as possible in order to minimize equipment downtime and potential costs during that downtime.

3. Copyrighted Materials

The ESD may, without competitive bidding and regardless of a dollar amount, purchase copyrighted materials where there is only one known supplier available for such goods. Examples of copyrighted materials covered by this special procurement procedure may include, but are not necessarily limited to, newly adopted textbooks/instructional materials, workbooks, curriculum kits, reference materials, audio and visual media and non-mass-marketed software from a particular publisher or their designated distributor.

Findings of Fact

By their nature, copyrighted materials are protected for the use of a single owner. Copyrighted materials may not be duplicated by others without the copyright owner's permission or license. Copyrights are established and regulated under federal law.

Often, copyrighted materials are produced by only one supplier who may be the owner of the copyright or their licensee. Textbooks/Instructional materials are examples of copyrighted materials that the ESD purchases through a sole source. Textbooks/Instructional materials are adopted through a statewide process under the authority of the Oregon Department of Education.

A textbook/instructional material adoption defines the various materials which the ESD will purchase for use in its educational programs.

The ESD purchases its textbooks/instructional materials through the Northwest Textbook Depository. This practice enables the regional textbook depository to purchase and warehouse textbooks/instructional materials in conformance with adoptions made in the states of their region. The result is that savings are achieved through the depository's combined purchases on behalf of member ESDs. Freight costs for individual districts are reduced by the bulk purchases of the depository and the depository takes on the cost of stocking and warehousing enough to meet each member ESD needs.

The system of textbook/instructional materials distribution enables the ESD to participate in the largest possible bulk purchasing activity of adopted textbooks/instructional materials in the region. This ensures a cost savings to the ESD. A savings that would be jeopardized if the ESD was to act as an individual purchaser.

Conclusion of Compliance with Law

This special procurement will not encourage favoritism or substantially diminish competition in the awarding of public contracts. The production and distribution of copyrighted materials is controlled by the owner of the copyright and may only be permitted through a sole source. The ESD has no control over this.

The awarding of contracts pursuant to this special procurement will result in a cost savings to the ESD when it needs to purchase copyrighted materials and there is only one known supplier for such goods, or otherwise substantially promote the public interest.

4. Product Prequalification

- a. When specific design or performance specifications must be met or such specifications are impractical to create or reproduce for a type of product to be purchased, the district may specify a list of approved or qualified products by reference to the prequalified product(s) of particular manufacturers or vendors in accordance with the following product prequalification procedure:
 - (1) The ESD will make reasonable efforts to notify all known manufacturers and vendors of competing products of the ESD's intent to compile a list of prequalified products. The notice will explain the opportunity manufacturers and vendors of competing products will have to apply to have their product(s) included on the ESD's list of prequalified products. At its discretion, the ESD may provide notice by advertisement in a trade paper of general statewide circulation or other appropriate trade publication; or instead of advertising, the ESD may provide written notice to those manufacturers and vendors appearing on the appropriate list maintained by the ESD; and
 - (2) The ESD will accept manufacturer and vendor applications to include products in the ESD's list of prequalified products up to 15 calendar days prior to the initial advertisement for bids or proposals for the type of product to be purchased, unless otherwise specified in the advertisement or in the ESD's written notice.
- b. If the ESD denies an application for including a product on a list of prequalified products, the ESD shall promptly provide the applicant with a written notice of the denial and include the reason for denial. The applicant may submit a written appeal within 7 calendar days to the district business manager to request review and reconsideration of the denial.

Findings of Fact

- a. There are occasions when the ESD needs to establish a list of prequalified products before it invites bids or proposals to furnish the products. The ESD may have a specific performance or design need, but it is impractical for the ESD to create a specification for the type of products to be purchased. An example is audiovisual equipment. There is a tremendous variety of audiovisual products offered in the market. The equipment technology is complex and constantly changing. It would be very burdensome and time consuming for the ESD to generate nonbrand name, generic performance specifications for such equipment every time it wants to make a purchase.

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Also, competition would be poorly served because bidders and proposers would not know in advance whether their offered product would meet the general specification substantially enough to be considered a responsive offer. The decision to make an award would be slow, because each product offered would have to be analyzed against the ESD's specification. Slowdown in the award process affects both bidders, who are asked to hold their bids open until award is made, and ESD programs, because staff are not able to order the equipment they need until the contract is awarded.

In this case, it might be more cost effective and efficient for the ESD to prequalify products and establish a list of approved products before invitations to bid are sent out. The prequalification process can be done some time before the need for a new contract. Once the prequalified product list is established, the bidding and contract award process can go quickly and smoothly.

- b. A second occasion when prequalification of products will be useful is when the specific design or performance specifications for a product are so exacting that the ESD must have time to carefully consider what is offered in the market that may or may not meet the specifications and, if necessary, reconsider its options before issuing an invitation to bid.
- c. This rule sets out a process of prequalification which requires the use of advertisement or other appropriate means to notify vendors of competing products of their opportunity to submit items for prequalification. The ESD maintains vendor mailing lists which are open to all interested vendors. The ESD uses these lists routinely to notify vendors of its intentions to prequalify products or to invite bids on products.
- d. This includes a 15-day time limit between the closure of a prequalification list and a related invitation to bid. This time factor ensures that vendors have a reasonable time to apply to include their products on a prequalified product list.
- e. Subsection b. of this rule provides vendors with an appeal process to follow if their application for prequalification is denied.

Conclusion of Compliance with Law

Where prequalification of products is appropriate, it is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or diminish competition for such contracts. There are several safeguards in the rule to prevent this, including notice, advertising, time and appeal process requirements to ensure that vendors are given a fair and open opportunity to participate in the prequalification process.

The prequalification of products process is a time-consuming effort for the ESD. It is not a shortcut procurement method. The ESD would use this method only after balancing cost-saving considerations, such as the ability of the ESD to create or generate nonbrand name generic specifications for types of products or the need for lengthy product evaluation prior to a contract award. If the prequalification method is chosen, it will result in a cost savings to the ESD because the normal method of product selection is too cumbersome and costly to pursue, or otherwise substantially promote the public interest.

2. Requirements Contracts (Blanket Purchase Orders, Price Agreements)¹

- a. The business manager, on behalf of the ESD, may establish requirements contracts for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining ESD requirements for volume discounts, standardization among schools and departments and reducing lead time for ordering.
- b. The ESD may enter into a requirements contract (also known as a blanket purchase order or price agreement) whereby it is agreed to purchase goods or services for an anticipated need at a predetermined price or price discount from a price list, provided the contract is led by a competitive procurement process pursuant to the requirements of the public contracting code and these rules.
- c. Once a requirements contract is established, schools and departments may purchase the goods and services from the awarded contractor without first undertaking additional competitive solicitation.
- d. Schools and departments shall use requirements contracts established by the ESD, unless otherwise specified in the contract, allowed by law or these rules or specifically authorized by the superintendent or designee.
- e. Under the authority of ORS 279A.025 and 279B.085, the ESD may use the requirements contract entered into by another Oregon public agency when:
 - (1) The original contract met the requirements of public contracting code; and
 - (2) The original contract allows other public agency usage of the contract; and
 - (3) The original public contracting agency concurs and this is documented by a written interagency agreement between the ESD and the agency.
- f. The term of any ESD requirements contract, including renewals, shall not exceed five years unless otherwise permitted under the public contracting code.

Findings of Fact

This rule permits the ESD to enter into a requirements contract, in which the vendor agrees to provide specified goods and services over the term of the contract at the bid price or discount rate.

A requirements contract is useful when the purchase of the goods or services are routine and repetitive. For example, school, office, custodial and facilities maintenance supplies are customarily purchased through requirements contracts.

Requirements contracts are a common method of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, obtaining volume discounts, standardizing usage among schools and departments and reducing lead time for ordering.

¹ The Oregon Procurement Information Network (ORPIN) allows authorized members to utilize the state's price agreement/contracts to purchase goods and services. Authorized Oregon Cooperative Procurement Program (ORCPP) members can legally attach to a state price agreement and forego the competitive bid process. Access to hundreds of competitive price contracts for a wide variety of goods and services: vehicles, computers, furniture, copiers, fax machines, travel, pharmaceuticals, office products, etc., is available. Counties, cities, schools, municipalities or their public corporate entities having local governing authority, a United States governmental agency or American Indian tribe or agency are eligible to participate.

The ESD establishes requirements contracts as a result of open competitive bidding or RFP processes, unless otherwise permitted under the public contracting code.

D The ESD limits the term of a requirements contract, including all renewal options, to a maximum of five years before competitive rebidding must be done, unless otherwise permitted under the public contracting code.

The ESD may use the requirements contracts established by other public agencies, subject to certain conditions of state law, Board policy and administrative regulation.

Conclusion of Compliance with Law

E It is unlikely that this special procurement will result in favoritism in the awarding of public contracts or diminish competition for such contracts. The ESD will only enter into requirements contracts which result from open competitive bidding processes. This condition applies also to the use of requirements contracts established by other public contracting agencies.

J The awarding of ESD requirements contracts will result in a cost savings to the ESD, or otherwise substantially promote the public interest. It would be costly and inefficient to make routine, repetitive purchases of goods and services through individual transactions. Also, the guaranteed volume of a requirements contract allows the ESD to get better prices from bidders.

3. Used Personal Property or Equipment, Purchase²
 - a. Subject to the provisions of this rule, the ESD may purchase used property or equipment without obtaining competitive bids or quotes, if the ESD has determined that the purchase will result in cost savings to the ESD and will not diminish competition or encourage favoritism. “Used personal property or equipment” is property or equipment which has been placed in its intended use by a previous owner or user for a period of time recognized in the relevant trade or industry as qualifying the personal property or equipment as “used” at the time of ESD purchase. Used personal property or equipment generally does not include property or equipment if the ESD was the previous user, whether under a lease, as part of a demonstration, trial or pilot project or similar arrangement.
 - b. For purchases of used personal property or equipment costing less than or equal to \$150,000, the ESD shall, where feasible, obtain three competitive quotes unless the ESD has determined and documented that a purchase without obtaining competitive quotes will result in cost savings to the ESD and will not diminish competition or encourage favoritism.
 - c. For purchases of used personal property or equipment totaling \$150,000 or more, the ESD shall attempt to obtain three competitive quotes. The ESD will keep a written record of the source and amount of quotes received. If three quotes are not available, a written record must be made of the attempt to obtain quotes.

² When contracting with another governmental entity, a district has a stator exemption under ORS 279A.025. The district may purchase state/federal surplus property through the Department of Administrative Services (DAS), State Services Division for Surplus Property. For more information on this program, contact DAS at 503-378-3014.

Findings of Fact

The ESD is responsible to manage expenditures in the best interests of the public. Cost savings can be achieved through the procurement of used property and equipment. The ESD purchases used property and equipment when it meets the ESD's needs and is cost effective. Considerations include type, quality, quantity and estimated useful life of the used item.

Used equipment and property becomes available sporadically and without notice. Used equipment and property is generally sold on a first-come, first-served basis. When used property or equipment does become available, the ESD must be able to respond immediately in order to obtain the property or equipment.

Some types of property or equipment may not be readily available in the new goods market. The ESD may have to look for used items to fill the need.

Competition to provide used property and equipment may be very limited and inconsistent, depending on the type of product.

The ESD maintains vendor lists which include information on whether a vendor provides used property or equipment. These lists are open to all vendors.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the award of public contracts or substantially diminish competition for such contracts. The purchase of used property or equipment depends on an inconsistent, sporadic market. When a used item is available, there is often little competition available. Sources for used items of the type, quality and quantity required by the district are inconsistent. This rule requires the ESD to attempt to obtain and document quotes as appropriate to the dollar amount of the purchase. If the anticipated purchase is over \$150,000, the ESD will advertise its need.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. The cost of used equipment or property is generally substantially less than that of new. Savings of 20 percent to 50 percent are not uncommon. Used equipment can provide good value to the ESD and help ensure the continuation of ESD services and programs.

4. Information Technology Contracts

The ESD may enter into a contract to acquire information technology hardware and software without competitive bidding subject to the following conditions:

- a. If the contract amount does not exceed \$150,000, the ESD shall attempt to obtain three competitive quotes pursuant to the rules governing Intermediate Procurements. The ESD shall keep a written record of the sources of the quotes or proposals received. If three quotes or proposals are not reasonably available, fewer will suffice, but the ESD shall make a written record of the effort made to obtain the quotes or proposals.
- b. If the contract amount exceeds \$150,000, the ESD shall determine and use the best procurement method, pursuant to the public contracting code and these rules, and shall solicit written proposals in accordance with the requirements of the *Attorney General's Model Public*

Contract and LCRB Rules. The ESD shall document the evaluation and award process, which will be part of the public record justifying the award;

- c. If the amount of the contract is estimated to exceed \$150,000, the ESD shall provide proposers an opportunity to review the evaluation of their proposals before final selection is made.

Findings of Fact

- a. Rapid changes in technology make it necessary for the ESD to be able to purchase needed computer equipment quickly.
- b. Pricing for high-technology equipment also changes rapidly. It is frequently possible to take advantage of frequent price changes in the marketplace in the purchase of computer equipment.
- c. There is generally sufficient competition among vendors of information technology hardware and software for ESD business.
- d. The ESD will follow rules governing special procurements and obtain at least three informally solicited quotes for purchases less than or equal to \$150,000.
- e. If the ESD requires a brand name or sole source product, the district will follow its rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements to procure it.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the award of ESD contracts or substantially diminish competition for ESD contracts. The purchase of information technology hardware and software will be made in accordance with other competitive bidding rules contained in this administrative regulation. If the anticipated purchase is over \$150,000, the ESD will advertise its need.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. Competition will be encouraged at all dollar levels of purchase of information technology hardware and software. This rule gives the ESD some flexibility in selecting the method of competitive procurement but requires adherence to the rule on brand name or sole source acquisitions if those situations occur.

2. Telecommunications Systems - Hardware and Software Contracts

- a. The ESD may enter into a contract to acquire telecommunications system hardware and software, without competitive bidding, subject to the following conditions:
 - (1) If the contract amount does not exceed \$150,000, the ESD shall attempt to obtain three competitive quotes pursuant to the rules governing Intermediate Procurements. The ESD shall keep a written record of the sources of the quotes or proposals received. If three quotes or proposals are not reasonably available, fewer will suffice, but the ESD shall make a written record of the effort made to obtain the quotes or proposals.
 - (2) If the contract amount exceeds \$150,000, the ESD shall determine and use the best procurement method, pursuant to the public contracting code and these rules and shall solicit written proposals in accordance with the requirements of Chapter 137, Divisions 047 and 049 of the *Attorney General's Model Public Contract [and LCRB] Rules*. The ESD shall document the evaluation and award process, which will be part of the public record justifying the award.

b. The telecommunications solicitation authorized in subsection 10.a.(1) of these rules shall:

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- (1) State the contractual requirements in the solicitation document;
 - (2) State the evaluation criteria to be applied in awarding the contract and the role of any evaluation committee. Criteria that would be used to identify the proposal that best meets the district's needs may include, but are not limited to, cost, quality, service and support, compatibility, product or system reliability, vendor viability and financial stability, operating efficiency and expansion potential;
 - (3) State the provisions made for bidders or proposers to comment on any specifications which they feel limit competition.

Findings of Fact

- F**
- a. Rapid changes in technology make it necessary for the ESD to be able to purchase needed telecommunications hardware and software quickly.
 - b. Since deregulation, there is generally adequate competition among vendors of telecommunication hardware and software to allow the ESD to make competitive purchases.
 - c. Pricing for telecommunications hardware and software also changes frequently. It is important for the ESD to take advantage of price competition in the marketplace.
 - d. The ESD will follow procedures governing special procurements and document reasonable efforts to obtain at least three informally solicited quotes for purchases over \$10,000 but less than or equal to \$150,000.
 - e. If a purchase of telecommunications hardware or software is expected to cost more than \$150,000, the ESD will use a formal competitive bidding or proposal process in accordance with these rules and the *Attorney General's Model Public Contract [and LCRB] Rules*.
 - f. There are also times when the ESD needs to purchase specific items that are compatible with current equipment. On these occasions, the district will follow its rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements to make the purchase.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. The purchase of telecommunications hardware and software will be made in accordance with other competitive bidding rules herein. If the anticipated purchase is over \$150,000, the ESD will advertise its need.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. Competition will be encouraged at all dollar levels of purchase of telecommunications hardware and software. This rule gives the ESD some flexibility in selecting the method of competitive procurement but requires adherence to the rule on brand name or sole source acquisitions if those situations occur.

2. Telecommunications Services

- E**
- a. The ESD shall secure the most competitive, cost-effective telecommunications services of the quality needed to meet all service performance requirements while minimizing administrative and service delivery costs. The ESD will use routine purchasing procedures whenever possible, but if necessary, the ESD can consider alternative procurement methods in accordance with this rule.

The ESD will generally follow the normal competitive procurement processes in obtaining telecommunications services. This process will only be used if necessary where there is a lack of sufficient competition to furnish needed services.

b. In determining the appropriate procurement method for telecommunications services, the ESD shall comply with the requirements of ORS 291.038 and determine whether competition exists. In determining whether competition exists, the ESD may consider the following factors:

- (1) The extent to which alternative providers exist in the relevant geographic and service market; the greater area of [Insert Name] County;
- (2) The extent to which alternative services offered are comparable or substitutable in technology, service provided and performance. For example, if the ESD requires digital services, analog services are not comparable or substitutable. If the ESD requires fiber optic technology, then copper, microwave or satellite transmission technology may not be comparable or substitutable;
- (3) The extent to which alternative providers can respond to the ESD's interest in consistency and continuity of services throughout its service area, volume discounts, equitable service for all users, centralized management and limiting ESD liability. For example, to be considered as the ESD's long-distance service provider, any long-distance service vendor must be able to meet, support and interface with the ESD's centralized automated billing requirements. The ESD must document for the record its findings on these factors or any other factors used in determining whether competition exists. In developing its findings, the ESD may solicit the information either through informal telephone or written contacts or through a formal solicitation such as an RFP.

c. If the ESD determines that competition does not exist in the area for the relevant service, the ESD may proceed to secure the service on a sole source basis, as described in the ESD's rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements.

Findings of Fact

- a. Since deregulation, there is generally adequate competition among vendors of telecommunication services to allow the ESD to make competitive procurements.
- b. Since there is competition, price competition exists in the marketplace. It is important for the ESD to take advantage of existing competition.
- c. The ESD will follow its rules governing special procurements and document reasonable efforts to obtain at least three informally solicited quotes for purchases less than or equal to \$150,000. The ESD shall keep a written record of the sources of the quotes or proposals received. If three quotes or proposals are not reasonably available, fewer will suffice, but the ESD shall make a written record of the effort made to obtain the quotes or proposals.
- d. If a purchase of service is expected to cost more than \$150,000, the ESD will use a formal competitive bidding or proposal process in accordance with these rules and the *Attorney General's Model Public Contract and LCRB Rules*.
- e. There may be occasions where there is limited competition that can furnish telecommunications services of the quality and extent required by ESD operations. In such instances, the ESD will follow this rule and also its rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements to procure needed services from the sole source.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. Routinely, the purchase of telecommunications services will be made in accordance with other competitive bidding rules contained in this administrative regulation. If the anticipated purchase is over \$150,000, the ESD will advertise its need, issue a written solicitation document and invite written bids or proposals to be furnished in response.

There may be circumstances, however, where sufficient competition does not exist in the relevant geographic and service market area. In such cases, the ESD will follow this rule in determining whether sufficient competition exists to make a competitive procurement.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. Competition will be encouraged at all dollar levels of purchase of telecommunications hardware and software. This rule gives the ESD some flexibility in selecting the method of competitive procurement but requires adherence to the rule on brand name or sole source acquisitions if those situations occur. The rule also states the steps to be taken to document situations where sufficient competition may not exist and a sole source purchase needs to be made.

2. Hazardous Material Removal; Oil Cleanup

- a. The ESD may enter into public contracts without competitive bidding, regardless of a dollar amount, when ordered to cleanup oil or hazardous waste pursuant to the authority granted to the Oregon Department of Environmental Quality (DEQ) under ORS Chapter 466, especially ORS 466.605 through 466.680. In exercising its authority under this exemption, the ESD shall:
 - (1) To the extent reasonable under the circumstances, encourage competition by attempting to make informal solicitations or to obtain informal quotes from potential suppliers of goods and services;
 - (2) Make written findings describing the circumstances that require the cleanup or maintain a copy of the DEQ order for the cleanup;
 - (3) Record the measures taken under 12.a.(1) of this rule to encourage competition, the amount of the quotes or proposals obtained, if any, and the reason for selecting the contractor to whom award is made.
- b. The ESD shall not contract pursuant to this special procurement in the absence of an order from the DEQ to cleanup a site which includes a time limit that would not allow the ESD to hire a contractor under normal competitive bidding procedures. Goods and services to perform other hazardous material removal or cleanup will be purchased in accordance with normal competitive bidding procedures as described in Board policy with this administrative regulation.

Findings of Fact

- a. When the DEQ orders a public agency to remove or cleanup hazardous material or oil, the public agency must respond within a very short time, which is stated in the DEQ order. This time period does not generally allow the agency to take the time necessary to solicit written

bids or proposals for the work to be performed. The ESD would be liable for any delay in responding to DEQ orders to perform hazardous material removal or cleanup.

- b. This exemption will not be used in those situations where there is no DEQ order to remedy the situation. Routine competitive procurement methods will be used where there is no DEQ order to act immediately. The ESD maintains open lists of vendors who are interested in providing hazardous material removal and cleanup services. Whenever it needs hazardous material removal or disposal, the ESD makes use of these lists to solicit quotes, bids or proposals as needed, in addition to advertising the procurement as required.
- c. Cost savings are achieved through this exemption because the ESD can be liable for DEQ penalties and fines if it does not timely remove hazardous materials or oil as ordered. There is also serious risk in these situations that property damage or personal injury could result if the ESD is slow to act.

Conclusions of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts as required by ORS 279B.085(3)(a). If it is under DEQ order to act immediately, the ESD will still attempt to obtain competitive quotes for the work to be performed as it has the ability and time to do so. Unless the ESD is faced with the quasi-emergency situation of a DEQ order to remove or cleanup hazardous waste or oil, it will follow normal competitive procedures to obtain these services.

The award of public contracts pursuant to this special procurement will result in a cost savings to the ESD in these situations, as required by ORS 279B.085(3)(b), because the ESD must comply with the law and avoid and minimize risk to persons and property. Where possible, it will seek competitive quotes for the work to be performed and will award the contract to the lowest, responsive and responsible bidder.

2. Renegotiation of Existing Contracts with Incumbent Contractors

- a. The ESD may amend or renegotiate contracts with existing vendors, service providers or other parties subject to the limitations of this rule.
- b. The ESD has determined that [value engineering,] [specialized expertise required,] [public safety] [and technical complexity], generally do not apply to this special procurement procedure.
- c. The renegotiated contract falls within a current special procurement procedure, but if not the LCRB must approve a separate special procurement.
- d. The ESD may renegotiate certain terms, but they must not unreasonably alter the scope of the original contract.

Findings of Fact

- a. The LCRB may amend contracts when it is in the best interest of the ESD. The superintendent and/or other designee, acting on behalf of the LCRB, may renegotiate certain provisions, including:
 - (1) Price;
 - (2) Term;
 - (3) Delivery and shipping;
 - (4) Order size;

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- (5) Substitution;
- (6) Warranties;
- (7) Online ordering systems;
- (8) Price adjustments;
- (9) Product availability;
- (10) Product quality;
- (11) Reporting requirements; or
- (12) Discounts.

Any contract amendment will be supported by legal consideration when necessary to validate the amended provision.

- b. The amended terms must be within a reasonable scope of the original contract, but not fundamentally alter the agreement or nature of goods or services. ESDs may, however, request functionally equivalent substitutes for goods or services in the original contract.
- c. The contract as a whole must be more favorable to the individual needs of the ESD to justify renegotiation. Cost may be a factor in determining what is a favorable change to the original contract, but the ESD may use factors other than cost that demonstrate that the amended contract is more favorable to the unique needs of the ESD.

Conclusion of Compliance with Law

This special procurement will not encourage favoritism or substantially diminish competition in awarding public contracts because it already exists as a contract awarded in compliance with the ESD's special procurement and public contracting code.

The awarding of contracts under this special procurement will result in cost savings to the ESD when it needs to renew its original contract with vendors, service providers or other parties, or otherwise substantially promote the public interest.

EXEMPTIONS FROM COMPETITIVE BIDDING

All public contracts shall be based upon competitive bids or proposals, except the following:

1. Contracts which have been specifically exempted under ORS 279A.025 and 279C.335; and
2. Contracts covered by the class exemptions in the following set of rules developed pursuant to ORS 279C.335(2) and (5) and based on Oregon Administrative Rules, Chapter 137, Divisions 46 through 49.

The Board, acting as the LCRB for the ESD, has made the findings required by ORS 279C.330, ORS 279C.335 and ORS 279C.345, and determined that awarding a contract under this exemption is unlikely to encourage favoritism or substantially diminish competition and will likely result in a substantial cost savings and other substantial benefits to the ESD.

In approving a finding under this section, the local contract review board shall consider the type, cost and amount of the contract and, to the extent applicable to the particular public improvement contract or class of public improvement contracts, the following:

1. How many persons are available to bid;

2. The construction budget and the projected operating costs for the completed public improvements;
3. Public benefits that may result from granting the exemption;
4. Whether value engineering techniques may decrease the cost of the public improvement;
5. The cost and availability of specialized expertise that is necessary for the public improvement;
6. Any likely increases in public safety;
7. Whether granting the exemption may reduce risks to the district or the public that are related to the public improvement;
8. Whether granting the exemption will affect the sources of funding for the public improvement;
9. Whether granting the exemption will better enable the district to control the impact that market conditions may have on the cost of and time necessary to complete the public improvement;
10. Whether granting the exemption will better enable the district to address the size and technical complexity of the public improvement;
11. Whether the public improvements involves new construction or renovates or remodels an existing structure;
12. Whether the public improvement will be occupied or unoccupied during construction;
13. Whether the public improvement will require a single phase of construction work or multiple phases of construction work to address specific project conditions; and
14. Whether the district has or has retained under contract, and will use district personnel, consultants and legal counsel that have necessary expertise and substantial experience in alternative contracting methods to assist in developing the alternative contracting method that the district will use to award the public improvement contract and to help negotiate, administer and enforce the terms of the public improvement contract.

Only these findings are required for each class or individual contract exemption, unless the LCRB specifically excludes a finding or includes an additional finding.

Promulgation of these exemptions can only occur after public notification and a public hearing to receive testimony pertaining to draft exemptions and findings, pursuant to ORS 279C.335.

1. Brand Names or Products, “or Equal,” Single Seller and Sole Source
 - a. The ESD may purchase brand names or products from a single seller or sole source without competitive bidding subject to the limitations of this rule.
 - b. The ESD has determined that value engineering, specialized expertise required, public safety and technical complexity, generally do not apply to this exemption.
 - c. Solicitation specifications for public contracts of the ESD shall not expressly or implicitly require any product of any particular manufacturer or seller except as expressly authorized in subsections 1.d. and 1.e. of this rule.
 - d. The ESD may specify a particular brand name, make or product suffixed by “or equal,” “or approved equal,” “or equivalent,” “or approved equivalent” or similar language if there is no

other practical method of specification after documenting the procurement file with the following:

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- (1) A brief description of the solicitation(s) to be covered, including contemplated future purchases;
 - (2) Description of the brand name, mark or product to be specified; and
 - (3) A brand name specification may be prepared and used only if the ESD determines for a solicitation or class of solicitations that only the identified brand name specification will meet the needs of the ESD based on one or more of the following written determinations:
 - (a) The use of the brand name specification is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts; or
 - (b) Specification of the brand name, mark or product would result in substantial cost savings to the ESD; or
 - (c) There is only one manufacturer or seller of the product of the quality, performance or functionality required; or
 - (d) The efficient utilization of existing goods requires the acquisition of compatible goods and services.
 - (4) The ESD shall make reasonable effort to notify all known suppliers of the specified product and invite such vendors to submit competitive bids or proposals.
- e. The ESD may purchase a particular product or service available from only one source, after documenting the procurement file with the ESD's findings of current market research to support the determination that the product is available from only one seller or source. The ESD's findings shall include:
- (1) A brief description of the contract or contracts to be covered, including contemplated future purchases;
 - (2) Description of the product or service to be purchased; and
 - (3) The reasons the ESD is seeking this procurement method, which shall include any of the following:
 - (a) That the efficient utilization of existing equipment, supplies or services requires the acquisition of compatible equipment, supplies or services; or
 - (b) That the goods or services required for the exchange of software or data with other public or private agencies are available for only one source; or
 - (c) That the goods or services are for use in a pilot or an experimental project; or
 - (d) Other findings that support the conclusion that the goods or services are available from only one source.
 - (4) To the extent reasonably practical, the contracting agency shall negotiate with the sole source to obtain contract terms advantageous to the contracting agency.
- f. The ESD may specify a product or service available from only one manufacturer but available through multiple sellers, after documenting the procurement file with the following information:

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- (1) If the total purchase is over \$10,000 but does not exceed \$100,000, and a comparable product or service is not available under an existing state cooperative purchasing contract, competitive quotes shall be obtained by the ESD and retained in the procurement file; or
 - (2) If the amount of the purchase exceeds \$100,000, the product or service shall be obtained through competitive bidding unless a specific exemption is granted by the LCRB.
- g. If the ESD intends to make several purchases of the product of a particular manufacturer or seller for a period not to exceed five years, the ESD will so state in the solicitation file and in the solicitation document, if any. Such documentation shall be sufficient notice as to subsequent purchases. If the total purchase amount is estimated to exceed \$100,000, this shall be stated in the advertisement for bids or proposals.

Findings of Fact/Conclusion of Compliance with Law

It is unlikely that this process will encourage favoritism in the award of public contracts or substantially diminish competition for such contracts, as required by ORS 279C.335(2)(a).

This class exemption applies only to contracts under a limited dollar amount, and then, only after efforts to obtain competitive quotes are made, or other methods have been employed to ensure that competitive means are used if available. The ESD maintains open lists from which vendors are contracted for quotations. In addition, as required by ORS 279C.335(2)(b) award of a public contract subject to the above described exemption should likely result in substantial cost savings and other substantial benefits to the ESD by virtue of the ability to reduce solicitation costs when it is known that comparable products are not available, or when specifying another product solely to meet a competition requirement might lead to lower initial cost but longer lifetime cost.

2. Product Prequalification

- a. When specific design or performance specifications must be met or such specifications are impractical to create or reproduce for a type of product to be purchased, the ESD may specify a list of approved or qualified products by reference to the prequalified product(s) of particular manufacturers or vendors in accordance with the following product prequalification procedure:
 - (1) The ESD will make reasonable efforts to notify all known manufacturers and vendors of competing products of the ESD’s intent to compile a list of prequalified products. The notice will explain the opportunity manufacturers and vendors of competing products will have to apply to have their product(s) included on the ESD’s list of prequalified products. At its discretion, the ESD may provide notice by advertisement in a trade paper of general statewide circulation or other appropriate trade publication; or instead of advertising, the ESD may provide written notice to those manufacturers and vendors appearing on the appropriate list maintained by the ESD; and
 - (2) The ESD will accept manufacturer and vendor applications to include products in the ESD’s list of prequalified products up to 15 calendar days prior to the initial advertisement for bids or proposals for the type of product to be purchased, unless otherwise specified in the advertisement or in the ESD’s written notice.
- b. The ESD has determined that special expertise required, generally, does not apply to this rule.
- c. If the ESD denies an application for inclusion of a product on its list of prequalified products, the ESD shall promptly provide the applicant with a written notice of the denial and include

the reason for denial. The applicant may submit a written appeal within [seven] calendar days to the ESD business manager to request review and reconsideration of the denial.

D Findings of Fact

a. There are occasions when the ESD needs to establish a list of prequalified products before it invites bids or proposals to furnish the products. The ESD may have a specific performance or design need, but it is impractical for the ESD to create a specification for the type of products to be purchased. An example is audiovisual equipment. There is a tremendous variety of audiovisual products offered in the market. The equipment technology is complex and constantly changing. It would be very burdensome and time consuming for the ESD to generate nonbrand name, generic performance specifications for such equipment every time it wants to make a purchase.

Also, competition would be poorly served because bidders and proposers would not know in advance whether their offered product would meet the general specification substantially enough to be considered a responsive offer. The decision to make an award would be slow, because each product offered would have to be analyzed against the ESD's specification. Slowdown in the award process affects both bidders, who are asked to hold their bids open until award is made, and ESD programs, because staff are not able to order the equipment they need until the contract is awarded.

In this case, it might be more cost effective and efficient for the ESD to prequalify products and establish a list of approved products before invitations to bid are sent out. The prequalification process can be done some time before the need for a new contract. Once the prequalified product list is established, the bidding and contract award process can go quickly and smoothly.

- b. A second occasion when prequalification of products will be useful is when the specific design or performance specifications for a product are so exacting that the ESD must have time to carefully consider what is offered in the market that may or may not meet the specifications and, if necessary, reconsider its options before issuing an invitation to bid.
- c. This rule sets out a process of prequalification which requires the use of advertisement or other appropriate means to notify vendors of competing products of their opportunity to submit items for prequalification. The ESD maintains vendor mailing lists which are open to all interested vendors. The ESD uses these lists routinely to notify vendors of its intentions to prequalify products or to invite bids on products.
- d. This includes a 15-day time limit between the closure of a prequalification list and a related invitation to bid. This time factor ensures that vendors have a reasonable time to apply to include their products on a prequalified product list.
- e. Subsection c. of this rule provides vendors with an appeal process to follow if their application for prequalification is denied.

Conclusion of Compliance with Law

Where prequalification of products is appropriate, it is unlikely that this exemption will encourage favoritism in the awarding of public contracts or diminish competition for such contracts as required by ORS 279C.335(2)(a). There are several safeguards in the rule to prevent this, including notice, advertising, time and appeal process requirements to ensure that vendors are given a fair and open opportunity to participate in the prequalification process.

The prequalification of products process is a time-consuming effort for the ESD. It is not a shortcut procurement method. The ESD would use this method only after balancing cost-saving considerations, such as the ability of the ESD to create or generate nonbrand name generic specifications for types of products or the need for lengthy product evaluation prior to a contract award. If the prequalification method is chosen, it will likely result in a substantial cost savings and other substantial benefits to the ESD as required by ORS 279C.335(2)(b) because the normal method of product selection is too cumbersome and costly to pursue.

2. Requirements Contracts (Blanket Purchase Orders, Price)³

- a. The business manager, on behalf of the ESD, may establish requirements contracts for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining ESD requirements for volume discounts, standardization among schools and departments and reducing lead time for ordering.
- b. The ESD has determined that value engineering, specialized expertise required and technical complexity, generally, do not apply to this rule.
- c. The ESD may enter into a requirements contract (also known as a blanket purchase order or price agreement) whereby it is agreed to purchase goods or services for an anticipated need at a predetermined price or price discount from a price list, provided the contract is led by a competitive procurement process pursuant to the requirements of the public contracting code and these rules.
- d. Once a requirements contract is established, schools and departments may purchase the goods and services from the awarded contractor without first undertaking additional competitive solicitation.
- e. Schools and departments shall use requirements contracts established by the ESD, unless otherwise specified in the contract, allowed by law or these rules or specifically authorized by the superintendent or designee.
- f. Under the authority of ORS 279A.025 and 279C.335, the ESD may use the requirements contracts entered into by another Oregon public agency when:
 - (1) The original contract met the requirements of the public contracting code; and
 - (2) The original contract allows other public agency usage of the contract; and
 - (3) The original public contracting agency concurs and this is documented by a written interagency agreement between the ESD and the agency.
- g. The term of any ESD requirements contract, including renewals, shall not exceed five years unless otherwise exempted pursuant to ORS 279C.335.

Findings of Fact

- a. This rule permits the ESD to enter into requirements contracts, in which the vendor agrees to provide specified goods and services over the term of the contract at the bid price or discount rate. A requirements contract is useful when the purchase of the goods or services are routine

³ The Oregon Procurement Information Network (ORPIN) allows authorized members to utilize the state's price agreement/contracts to purchase goods and services. Authorized ORCPP members can legally attach to a state price agreement and forego the competitive bid process. Access to hundreds of competitive price contracts for a wide variety of goods and services: vehicles, computers, furniture, copiers, fax machines, travel, pharmaceuticals, office products, etc., is available.

and repetitive. For example, school, office, custodial and facilities maintenance supplies are customarily purchased through requirements contracts.

- b. Requirements contracts are a common method of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, obtaining volume discounts, standardizing usage among schools and departments and reducing lead time for ordering.
- c. The ESD establishes requirements contracts as a result of open competitive bidding or RFP processes, unless otherwise exempted.
- d. The ESD limits the term of requirements contracts, including all renewal options, to a maximum of five years before competitive rebidding must be done, unless otherwise exempted.
- e. The ESD may use the requirements contracts established by other public agencies, subject to certain conditions of state law, Board policy and administrative regulation.

Conclusion of Compliance with Law

It is unlikely that this exemption will result in favoritism in the awarding of public contracts or diminish competition for such contracts, as required by ORS 279C.335(2)(a). The ESD will only enter into requirements contracts which result from open competitive bidding processes. This condition applies also to the use of requirements contracts established by other public contracting agencies.

The awarding of ESD requirements contracts will likely result in a substantial cost savings and other substantial benefits to the ESD, as required by ORS 279C.335(2)(b). It would be costly and inefficient to make routine, repetitive purchases of goods and services through individual transactions. Also, the guaranteed volume of a requirements contract allows the ESD to get better prices from bidders.

2. Waiver of Bid Security Requirements (Public Improvement Contracts under \$100,000)

The LCRB may, at its discretion, waive the bid security requirements of ORS 279C.390, if the amount of the contract for the public improvement is less than \$100,000. Although the bid security requirements of ORS 279C.390 are waived for public improvement contracts under \$100,000, the ESD may impose a bid or quote security requirements for projects under \$100,000, when deemed to be in the best interest of the ESD.

Findings of Fact/Conclusion of Compliance with Law

This rule allows the LCRB to waive bid security requirements for certain public improvement contracts. Waiver of the bid security is provided for by statute without a requirement for findings.

3. Waiver of Performance and Payment Security Requirements (Public Improvement Contracts under \$100,000)

The LCRB may, at its discretion, waive the performance/payment security requirements of ORS 279C.390 if the amount of the contract for the public improvement is less than \$100,000. Although the performance/payment security requirements of ORS 279C.390 are waived for public improvement contracts less than \$100,000, the ESD may impose a performance/payment security requirement for projects less than \$100,000 when deemed to be in the best interest of the ESD.

Findings of Fact/Conclusion of Compliance with Law

This rule allows the LCRB to waive performance/payment security requirements for certain public improvement contracts. Waiver of the performance/payment security is provided for by statute without a requirement for findings.

4. Projects with Complex Systems or Components

- a. For contracts for public improvements with significant components that are inherently complex and are also complex to procure through competitive bid, the ESD may, at its discretion, use RFP competitive procurement methods subject to the conditions described in ORS 279C.400 and conditions enumerated in this exemption.
- b. Definitions. For purposes of this exemption only: “Complex Systems” are defined as those systems which incorporate the procurement of materials or other components which are difficult, if not impossible, to create in an “equal” specifications basis for competitive bid. Examples of such systems include but are not limited to, contracts for supplying and installing computerized controls for building heating, venting, air conditioning systems; and contracts for artificial surface outdoor multipurpose athletic fields. “Significant” is intended to mean something more than de minimis, but not necessarily the majority of the project as determined by cost.

Finding of Fact/Conclusion of Compliance with the Law

It is unlikely that this exemption will encourage favoritism in the awarding of the public contracts or substantially diminish competition for such contracts as required by ORS 279C.335(2)(a). Contracts for public improvements occasionally incorporate the procurement of systems, materials, or other components (complex systems) for which it is extremely difficult to design bid specifications. In these situations, utilization of an RFP process where each of the systems can be evaluated utilizing a number of factors, in addition to price, will likely result in substantial cost savings and other substantial benefits to the ESD as required by ORS 279C.335(2)(b).

The ORS 279C.400 enumerates how RFPs are to be used if authorized by the LCRB. These criteria ensure that competitive means will be used and selection will be fair and impartial. As a result, it is unlikely that this process will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts as required by ORS 279C.335(2)(a). The awarding of contracts pursuant to this process will result in optimal value to the ESD based on selection by the ESD of the best competitive proposal that meets the stated evaluative criteria.

This class exemption is intended to be used for the types of procurements describe in the findings, where the specific system, materials or components represent a significant portion of the project. This class exemption is not intended to be used for CM/GC projects or other methods of alternative procurement unless these projects meet the requirements of this class exemption. The CM/GC and others, not meeting the requirements of this class exemption, may still be procured by RFP, provided that a project or contract specific exemption is promulgated by the LCRB.

Lane Education Service District

Code: DJC-AR
Revised/Reviewed:

Exemptions from Competitive Bidding and Special Procurements (Version 2)

{This optional administrative regulation is intended to provide guidance for the ESD in preparing a request for special procurement to the Local Contract Review Board (LCRB). This administrative regulation is not intended as procurement rules in place of the *Attorney General's Model Public Contracting Rules* or rules adopted by the LCRB.}

All public contracts shall be based upon competitive bids or proposals, except the following:

1. Contracts below threshold levels in accordance with ORS 279B.065 (small procurements for goods and services), 279B.070 (intermediate procurements for goods and services) and 279C.412 (intermediate procurements for public improvements);
2. Special procurements for goods and services in accordance with ORS 279B.085 and OAR 137-047-0285;¹
3. Contracts which have been exempted under ORS 279A.025 and 279C.335; and
4. Any other contract exempted by law.

SPECIAL PROCUREMENTS FOR GOODS AND SERVICES

To proceed with a special procurement, the ESD shall submit a written request to the Board, acting as the Local Contract Review Board (LCRB). This request shall describe the contracting procedure, the goods and services or class of goods and services that are the subject of the special procurement, and circumstances that justify the use of a special procurement.

The special procurement must be unlikely to encourage favoritism in the awarding of a public contract or to substantially diminish competition for public contracts; and (A) must be reasonably expected to result in substantial cost savings to the ESD or to the public; or (B) must substantially promote the public interest in a matter that could not practicably be realized by complying with requirements that are applicable under ORS 279B.055, 279B.060, 279B.065, 279B.070 or any related rules.

After LCRB approval, the ESD may proceed with a special procurement. Public notice of the approval of a special procurement must be given in the same manner as provided in ORS 279B.055(4). If the ESD intends to award a contract through special procurements that calls for competition among prospective contractors, the ESD shall award the contract to the contractor it determines to be most advantageous to the ESD.

When the LCRB approves a class special procurement the ESD may award contracts to acquire goods and services within the class of goods and services in accordance with the terms of the approval without making a subsequent request for a special procurement.

¹ Procurement law for goods and services uses the term “special procurement.” Procurement law for public improvement contracts does not use the term “special procurement,” but a comparable exemption is allowed under ORS 279C.335.

The following are additional considerations and requirements for specific types of special procurements. The request submitted to the LCRB should address these provisions and satisfy any requirements.

Brand Names or Equal²

1. “Brand name or equal specification” means a specification that uses one or more manufacturers’ names, makes, catalog numbers or similar identifying characteristics needed to meet the ESD’s requirements and that authorizes bidders or proposers to offer goods or services that are equivalent or superior to those named or described in the specification.
2. “Brand name specification” means a specification limited to one or more products, brand names, makes, manufacturer’s names, catalog numbers or similar identifying characteristics.”
3. “Specification” means any description of the physical or functional characteristics of, or of the nature of, goods or services to be procured by a contracting agency.³

A brand name or equal specification may be used when the use of a brand name or equal specification is advantageous to the ESD because the brand name describes the standard of quality, performance, functionality and other characteristics of the product needed by the ESD. The ESD is entitled to determine what constitutes a product that is equal or superior to the product specified, and any such determination is final. Nothing in the law or this administrative regulation may be construed as prohibiting the ESD from specifying one or more comparable products as examples of the quality, performance, functionality or other characteristics of the product needed by the contracting agency.

A brand name specification may be prepared and used only if the ESD determines for a solicitation or class of solicitations that only the identified brand name specification will meet the needs of the ESD based on one or more of the following written determinations:

1. That use of the brand name specification is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts;
2. That use of a brand name specification would result in substantial cost savings to the contracting agency;
3. That there is only one manufacturer or seller of the product of the quality, performance or functionality required; or
4. That efficient utilization of existing goods requires the acquisition of compatible goods or services.

Advertising Contracts, Purchase of⁴

The ESD traditionally purchases advertising in newspapers, however, the ESD may also purchase advertising in other media, such as radio, television or the internet. Advertising contracts may be procured without competitive procurement based on findings of:

² For additional guidance, see OAR 125-247-0691.

³ Specification may include a description of any requirement for inspecting, testing or preparing goods or services for delivery.

⁴ See OAR 125-247-0288(5) for additional guidance.

1. Advertisements are placed in a particular source because of the specific audience that source serves;
2. Competition to furnish advertising space in daily newspapers of general, trade or business circulation in the vicinity of the ESD is limited;
3. Cost savings are difficult to quantify where the sources are unique and not interchangeable;
4. Advertisements may be placed to satisfy legal notice or Board policy requirements;
5. Other published advertisements or notices, such as routine public notices, personnel recruitment information, etc., are placed in one or more of the publications of general circulation in the local area and other publications, as appropriate;
6. The communities served by the ESD rely upon its use of the local daily newspaper as a central source of news and information regarding ESD activities; or
7. It is unknown whether contracts for advertisements placed with radio, television, the internet or other media are going to result in cost savings if not placed for competitive bid or request for proposal (RFP). If possible, savings could be obtained through competitive means, the ESD would attempt to obtain competitive quotes or bids, as appropriate.

Advertising Contracts, Sale of

The ESD may sell advertising for ESD publications and activities, regardless of a dollar amount, without competitive bidding, including school newspapers, yearbooks, athletic programs, drama or music programs and the like.

Sales of advertising for student activities are generally other fund revenues, where student groups solicit advertisements from local businesses to help with the cost of the activity itself. A common example is the sale of advertising in school newspapers and yearbooks. The ESD itself would not achieve any increased revenue to the General Fund by seeking competitive bids or proposals for such advertising. This holds true for other student activities, such as athletics, drama or music events and the like.

Equipment Repair and Overhaul⁵

The ESD may enter into a public contract for equipment repair or overhaul without competitive bidding when competitive procurement is not practical. This may include when service or parts required are unknown and the cost cannot be determined without extensive preliminary dismantling or testing, or service or parts required are for sophisticated equipment for which specially trained personnel are required and such personnel are available from only one source. The ESD will use a competitive procedure to the extent practicable.

If the repair or overhaul qualifies as an emergency, the ESD may use emergency procurement procedures.

Copyrighted Materials

Contracts for the procurement or distribution of textbooks are exempt from public procurement requirements. Purchase of copyrighted materials available from only one source may be procured through

⁵ For additional guidance, see OAR 127-247-0288(6).

the sole source procedures. Requests for special procurement approval for the purchase of other copyrighted materials may be submitted to the LCRB with supporting information.

Used Personal Property or Equipment, Purchase⁶

The ESD may purchase used property or equipment without obtaining competitive bids or quotes, if at the time of purchase, the LCRB has determined that the purchase will result in substantial cost savings to the ESD or promote the public interest and will unlikely diminish competition or encourage favoritism. “Used personal property or equipment” is property or equipment which has been placed in its intended use by a previous owner or user for a period of time recognized in the relevant trade or industry as qualifying the personal property or equipment as “used,” at the time of ESD purchase.

Information Technology and Telecommunication Contracts⁷

The ESD may enter into a contract to acquire information technology hardware and software and services (including telecommunications) without competitive bidding if, the LCRB has determined that the purchase will result in substantial cost savings to the ESD or promote the public interest and will unlikely diminish competition or encourage favoritism.

Renegotiation of Existing Contracts with Incumbent Contractors

The ESD may amend or renegotiate contracts with existing vendors, service providers or other parties in accordance with OAR 137-047-0800.

EXEMPTIONS FOR PUBLIC IMPROVEMENT CONTRACTS

Oregon law⁸ allows for exceptions to competitive bidding for public improvement contracts or classes of contracts when the LCRB approves findings that:

1. The exemption is unlikely to encourage favoritism in awarding public improvement contracts or substantially diminish competition for public improvement contracts; and
2. Awarding a public improvement contract under the exemption will likely result in substantial cost savings and other substantial benefits to the ESD.

In approving a finding, the LCRB shall consider the type, cost and amount of the contract and, to the extent applicable to the particular public improvement contract or class of public improvement contracts, the following:

1. How many persons are available to bid;

⁶ For additional guidance, see OAR 125-247-0288(10). When contracting with another governmental entity, a ESD has a statutory exception under ORS 279A.025. The ESD may purchase state/federal surplus property through the Department of Administrative Services, State Services Division for Surplus Property. For more information on this program, contact DAS at 503-378-4714.

⁷ For additional guidance, see OAR 127-247-0185.

⁸ See ORS 279C.335.

2. The construction budget and the projected operating costs for the completed public improvement;
3. Public benefits that may result from granting the exemption;
4. Whether value engineering techniques may decrease the cost of the public improvement;
5. The cost and availability of specialized expertise that is necessary for the public improvement;
6. Any likely increases in public safety;
7. Whether granting the exemption may reduce risks to the contracting agency, the state agency or the public that are related to the public improvement;
8. Whether granting the exemption will affect the sources of funding for the public improvement;
9. Whether granting the exemption will better enable the contracting agency to control the impact that market conditions may have on the cost of and time necessary to complete the public improvement;
10. Whether granting the exemption will better enable the contracting agency to address the size and technical complexity of the public improvement;
11. Whether the public improvement involves new construction or renovates or remodels an existing structure;
12. Whether the public improvement will be occupied or unoccupied during construction;
13. Whether the public improvement will require a single phase of construction work or multiple phases of construction work to address specific project conditions; and
14. Whether the contracting agency or state agency has, or has retained under contract, and will use contracting agency or state agency personnel, consultants and legal counsel that have necessary expertise and substantial experience in alternative contracting methods to assist in developing the alternative contracting method that the contracting agency or state agency will use to award the public improvement contract and to help negotiate, administer and enforce the terms of the public improvement contract.

In granting this exemption, the LCRB shall:

1. If appropriate, direct the use of alternative contracting methods that take account of market realities and modern practices and are consistent with the public policy of encouraging competition;
2. Require and approve or disapprove written findings by the ESD that support awarding a particular public improvement contract or a class of public improvement contracts, without the competitive bidding requirements. The findings must show that the exemption complies with the requirements outlined in this administrative regulation; and
3. If the procurement involves construction manager/general contractor services, require the ESD conduct the procurement in accordance with OAR 137-049-0690.

Notification of a proposed exemption under this section must be published in at least one trade newspaper of general statewide circulation a minimum of 14 days before the date on which the LCRB intends to take

action to approve or disapprove the exemption. The notice must state that in response to a written request, the ESD will hold a public hearing for the purpose of taking comments on the draft findings for an exemption from the competitive bidding requirement.⁹ If a hearing is held, the ESD shall offer an opportunity for any interested party to appear and comments. If the ESD must act promptly because of circumstances beyond the ESD's control that do not constitute an emergency, notification of the proposed exemption may be published simultaneously with the ESD's solicitation of contractors, as long as responses to the solicitation are due at least five days after the agency intends to take action to approve or disapprove the proposed exemption.

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⁹ The ESD may hold a hearing even if there is no written request.

Lane Education Service District

Code: DJC
Adopted:

Bidding Requirements (Version 2)

{Highly recommended policy. The Board serves as the Local Contract Review Board (LCRB) and has the ability to adopt its own procurement rules. Many ESDs choose to use the *Oregon Attorney General's Model Public Contracting Rules* in OAR Chapter 137, Divisions 045 - 049. If the LCRB does not adopt rules, the Attorney General's Model Public Contracting Rules apply. This policy is based on those rules. The LCRB may also include as part of its rules portions of the Oregon Department of Administrative Services administrative rules in OAR Chapter 125, Divisions 269 - 249. If the LCRB adopts its own rules, delete portions of this policy that are inconsistent with those rules.}

[The Board is the Local Contract Review Board (LCRB) for the ESD. [The LCRB has not adopted its own rules of procurement. Consequently, the *Oregon Attorney General's Model Public Contracting Rules*¹ shall apply to the ESD.²]]

OR

[The Board is the Local Contract Review Board (LCRB) for the ESD. The LCRB has adopted its own rules of procedure that will govern ESD purchasing.³ Consequently, the model rules⁴ adopted by the Attorney General shall not apply to the ESD. The ESD shall review its rules each time the Attorney General adopts a modification of the model rules to determine whether any modifications need to be made to ESD rules, as required by ORS 279A.065(6)(b). New rules, as necessary, shall be adopted by the LCRB. In the event it is unnecessary to adopt new rules, Board minutes will reflect that the review process was completed as required.]

Additionally, the ESD may include as part of its procedures portions of the Oregon Department of Administrative Services administrative rules governing Public Contract Exemptions, OAR Chapter 125, Divisions 246 - 249.

The LCRB may make the written findings required by law for exemptions from competitive bidding. Such findings shall be maintained by the ESD and made available on request.

The ESD may not artificially divide or fragment a procurement to reduce the procurement requirements.

The superintendent may develop administrative regulations or procedures to assist with the implementation of this policy and applicable procurement rules.

Goods and Services

¹ Oregon Administrative Rules (OAR) 137-045 - 049

² See ORS 279A.065(5). {The LCRB can formally adopt the AG rules. If the LCRB formally adopts the rules, the ESD is required to review the AG rules each time there is a modification.}

³ [The ESD should insert date of adoption of such rules and their location here and remove brackets.]

⁴ Oregon Administrative Rules (OAR) 137-045 - 049

The ESD will purchase goods and services through the following procedures, unless an exception applies:

1. **P** Small Procurement. For purchases of goods and services with a contract price not exceeding \$25,000, the ESD can use any manner deemed practical or convenient, including direct selection or award. Amendments to a contract awarded through small procurement must be in accordance with OAR 137-047-0800.
2. **R** Intermediate Procurement. For purchases of goods and services with a contract price exceeding \$25,000, but not exceeding \$250,000, the ESD shall seek at least three informally solicited competitive price quotes or competitive proposals from prospective contractors. The ESD will keep record of the request and quotes. If three quotes are not reasonably available, fewer will suffice, but the ESD will make a written record of the effort made. The ESD may negotiate with a prospective contractor to clarify the quote or offer, or to effect modifications. Amendments to a contract awarded through intermediate procurement must be in accordance with OAR 137-047-0800.
3. **O** Regular Procurement. For purchases exceeding \$250,000, the ESD will use competitive sealed bids (OAR 137-047-0255) or competitive sealed proposals (OAR 137-047-0260). Amendments to contracts awarded through regular procurement must be in accordance with OAR 137-047-0800.
4. **P** Emergency Procurements. In situations of emergency⁵, the LCRB or designee may authorize an emergency procurement. In an emergency procurement, the ESD is not required to follow general procurement requirements. The ESD must ensure competition for the contract that is reasonable and appropriate under the circumstances. The ESD must document the nature of the emergency and the method used for the selection of the contractor.
5. **O** Sole-source Procurements. If the LCRB or designee determines that the goods or services are available from only one source, the ESD may award a contract without competition. To the extent reasonably practicable, the ESD shall negotiate with the sole source to obtain contract terms that are advantageous to the ESD. The determination of sole source must be based on written findings and may include:
 - a. That the efficient utilization of existing goods requires acquiring compatible goods or services;
 - b. That the goods or services required to exchange software or data with other public or private agencies are available from only one source;
 - c. That the goods or services are for use in a pilot or experimental project; or
 - d. Other findings that support the conclusion that the goods or services are available from only one source.⁶
6. **S** Special Procurements. “Special procurement” means a contract or class of contracts that use a contracting procedure other than competitive sealed proposals, competitive sealed bidding, small procurement or intermediate procurement. Special procurements require LCRB approval and will be conducted in accordance with ORS 279B.085, OAR 137-047-0285[, and] this policy [and

⁵ “Emergency” means circumstances that:

1. Could not have been foreseen;
2. Create a substantial risk of loss, damage or interruption of services or a substantial threat to property, public health, welfare or safety; and
3. Require prompt execution of a contract to remedy the condition.

⁶ If the contract does not exceed \$250,000, using intermediate procurement is likely less burdensome than sole source.

administrative regulation DJC-AR - Exemptions from Competitive Bidding and Special Procurement].^{7}

7. **Personal Services Contracts.** “Personal services contract,” as used in this policy, means a contract whose primary purpose is to acquire specialized skills, knowledge and resources in the application of technical or scientific expertise, or the exercise of professional, artistic or management discretion or judgment.⁸ Unless otherwise designated by the LCRB, personal services contracts will be procured in accordance with applicable procurement laws. The LCRB may designate certain service contracts or classes of service contracts as personal services contracts and exempt them from competitive bidding.^{9} All personal services contracts shall be based on demonstrated qualifications and competence to perform the required services, encourage competition, discourage favoritism and obtain services at a fair and reasonable price. Personal service contractors may be required to qualify as independent contractors in accordance with applicable laws.¹⁰

Procurements for services estimated to be in excess of \$250,000 shall go through the cost analysis and feasibility process in accordance with ORS 279B.030.

Public Improvements

“Public improvement” means a project for construction, reconstruction or major renovation on real property by or for the ESD.¹¹ The ESD will contract for public improvements using the following procedures, unless an exception applies.

1. Public improvements contracts with a value of less than \$25,000 are exempt from competitive bidding.
2. Intermediate Procurements. For public improvement contracts not exceeding \$100,000, the ESD may utilize three quotes¹²:

⁷ {If the LCRB has designated contracts or classes of contracts as special procurements, include this information along with reference to the LCRB action.}

⁸ This includes, but is not limited to, contracts for the services of an accountant, physician or dentist, educator, consultant (including a provider under an Architectural and Engineering Service Contract), broadcaster, or artist (including a photographer, filmmaker, painter, weaver or sculptor (OAR 137-045-0010(19)). Also includes architectural, engineering, photogrammatic mapping, transportation planning or land surveying services procured under ORS 279C.105 (ORS 279C.100) and related services procured under ORS 279C.120 (ORS 279C.100(5)).

⁹ {If the LCRB has designated contracts or classes of contracts as personal services contracts, include this information along with reference to the LCRB action.}

¹⁰ See ORS 670.600 and OAR 459-005-0020.

¹¹ Public improvement does not include:

1. Projects for which no funds of the ESD are directly or indirectly used, except for participation that is incidental or related primarily to project design or inspection; or
2. Emergency work, minor alternation, ordinary repair or maintenance necessary to preserve a public improvement.

¹² If three quotes are not reasonably available, the ESD shall make a written record of the effort made to obtain these quotes.

- a. The request for the quotes shall be in writing (unless not reasonably practicable)¹³;
- b. The request for quotes shall include the selection criteria and if the criteria are not of equal value, their relative value or ranking.

The ESD shall award the contract to the prospective contractor whose quote will best serve the interest of the ESD, based on the selection criteria. If the award is not made to the offeror and quote with the lowest price, the ESD will make a written record of the basis for the award. Amendments to a contract awarded via intermediate procurement may be increased in accordance with OAR 137-049-0160(6)-(7).

- 3. Regular Procurements. For purchases exceeding \$100,000, the ESD will use invitation to bid or request for proposals except as otherwise allowed by law. See OAR 137-049-0130 and OAR 137-049-0640. Amendments to contracts awarded through regular procurement must be in accordance with OAR 137-049-0910.
- 4. Emergency Procurements. Emergency contracts for construction services are not considered public improvement contracts and will be procured in accordance with OAR 137-049-0140 and OAR 137-049-0150.
- 5. Community Benefit Contracts. “Community benefit contract” means a public improvement contract that includes, but is not limited to, terms and conditions that require the contractor to:
 - a. Qualify as a training agent, as defined in ORS 660.010, or provide apprenticeship training that meets applicable federal and state standards for apprenticeship training;
 - b. Employ apprentices to perform a specified percentage of work hours that workers in apprenticeable occupations perform on the community benefit project;
 - c. Provide employer-paid family health insurance; and
 - d. Meet any other requirements that the LCRB sets forth.

Community benefits contracts may be procured in accordance with ORS 279C.308.

- 6. Construction Manager/General Contractor (CM/GC) Procurement. The ESD shall procure CM/GC services in accordance with model rules the Attorney General adopts under Oregon Revised Statute (ORS) 279A.065(3) and OAR 137-049-0690, which requires “the assistance of legal counsel with substantial experience and necessary expertise in using the CM/GC Method, as well as knowledgeable staff, consultants or both staff and consultants who have demonstrated capability of managing the CM/GC process in the necessary disciplines of engineering, construction scheduling and cost control, accounting, legal, Public Contracting and project management.”

END OF POLICY

Legal Reference(s):

[ORS Chapter 279](#)
[ORS Chapter 279A](#)
[ORS Chapter 279B](#)

[ORS Chapter 279C](#)
[ORS 670.600](#)
[OAR Chapter 125](#), Divisions 246 - 249
[OAR Chapter 137](#), Divisions 045 - 049
[OAR 459-005-0020](#)

¹³ For Public Works Contracts, oral quotations may only be utilized in the event that written copies of prevailing wage rates are not required by the Bureau of Labor and Industries.

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Lane Education Service District

Code: DJCA
Adopted: 3/21/06
Orig. Code(s): DJCA

Personal Services Contracts

The district may enter into personal services contracts with qualified professionals as provided by ORS 279A.055. Personal services contracts, as used in this policy, means contracts for specialized skills, knowledge and resources in the application of highly technical or scientific expertise or the exercise of professional, artistic or management discretion or judgment. The district may enter into a personal services contract with a current district employee only when the individual meets independent contractor status in accordance with state, Public Employees Retirement System (PERS) and Internal Revenue Service (IRS) requirements.

Selection of a personal services contractor will be based primarily on qualifications and performance history, expertise, knowledge and creativity and the ability to exercise sound professional judgment.

All personal services contracts shall be based on demonstrated qualifications and competence to perform the required services, encourage competition, discourage favoritism and obtain services at a fair and reasonable price.

Contracts for personal services in excess of \$25,000 shall require prior Board approval.

The superintendent will develop administrative regulations as necessary to implement this policy.

END OF POLICY

Legal Reference(s):

[ORS Chapters 279, 279A, 279B and 279C](#)

[ORS 332.107](#)
[ORS 670.600](#)

[OAR 459-010-0030](#)

INTERNAL REVENUE SERVICE, PUBLICATION 1779: INDEPENDENT CONTRACTOR OR EMPLOYEE (2005).

Lane Education Service District

Code: DJFA
Adopted: 12/11/01; 8/27/02
Orig. Code(s): DJFA

Use of Credit Cards

At the discretion of the superintendent, employees may, in the process of conducting Lane ESD business, use ESD credit cards.

Only authorized expenditures associated with ESD expenses may be purchased with the card.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

[ORS 652.610\(3\)](#)

OR. GOV'T STANDARDS AND PRACTICES COMM'N, Advisory Opinion 01A-1007 (Aug. 29, 2001).

Lane Education Service District

Code: DJFA-AR
Revised/Reviewed: 2/06/24
Orig. Code(s): DJFA-AR

Credit Card Procedures

When purchases via credit card are necessary, designated card holders are authorized to use ESD issued credit cards to secure appropriate goods or services, subject to purchasing procedures established by the director of business services.

1. Only employees of the ESD are eligible to receive a credit card. The business services director is authorized to issue credit cards to designated employees. [Such cards shall have a maximum limit of [\$750].]
2. The use of credit cards is subject to all applicable laws and rules regarding the purchase of goods and expenditures of ESD funds; credit cards are not a substitute for public bidding nor the ESD's existing procurement laws, policies, and regulations.
3. Card holders are responsible for the security of the card and all transactions made against the card. Credit cards cannot be used for:
 - a. Securing cash;
 - b. [Purchasing alcoholic beverages;]
 - c. Personal expenses (even with the intent of reimbursing the ESD);
 - d. Expenses that the card holder submits for per diem or reimbursement;
 - e. Fuel for use of personal vehicles while traveling on ESD business; and
 - f. Travel expenses when there is a personal benefit to the employee (i.e. earning frequent flyer miles, hotel loyalty rewards, etc.)
4. Credit cards will have a purchase limit commensurate with the needs of the individual card holder. Purchases that will exceed an individual's purchase card limit must be approved by the business services director.
5. An adequate accounting of all credit card transactions must be provided on a monthly basis. All credit card transactions must be documented by itemized receipts that substantiate the amount, date, location and business purpose. If adequate documentation is not provided, the card holder will be required to reimburse the ESD for the unsubstantiated expense.

Violations of these procedures or board policy may result in the revocation of credit card privileges and/or discipline up to and including dismissal.

Lane Education Service District

Code: DJG
Adopted: 12/11/01
Orig. Code(s): DJG

Vendor Relations

Lane ESD welcomes business and bids from all eligible vendors. Preferential treatment will not be extended to any vendor. Orders will be placed on the basis of quality, price and delivery, with past services being a factor if other considerations are equal.

The superintendent may allow sales representatives or agents of educational products to contact staff members at times that will not interfere with the business of the ESD. Prior approval by the superintendent or designee is required for all such solicitation.

Advertising is not allowed in the ESD unless it is approved by the superintendent. No ESD employee will receive compensation of any kind from any vendor for the sale of supplies or services.

END OF POLICY

Legal Reference(s):

[ORS 244.040](#)

[ORS 279A, 279B and 279C](#)

[ORS 334.125\(7\)](#)

Lane Education Service District

Code: DK
Adopted: 12/11/01
Orig. Code(s): DK

Payment Procedures

(If new language is added to DJ as proposed, is this still needed?)

All claims for payment from Lane ESD funds will be processed by the business office in conformance with ESD procedures. Payment will be authorized against invoices properly supported by approved purchase orders, with properly submitted vouchers, or in accordance with salaries and salary schedules approved by the Board.

The superintendent will be responsible for assuring that budget allocations are observed and that total expenditures do not exceed the amount allocated in the budget.

END OF POLICY

Legal Reference(s):

[ORS 294.305 - 294.565](#)

[ORS 328.460](#)

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Lane Education Service District

Code: DL
Adopted: 6/27/00
Revised/Readopted: 12/11/01; 8/27/02
Orig. Code(s): DL

Payroll

Preparation of payroll, including time schedules and payroll periods, will be done in accordance with the terms of the collective bargaining agreement, where applicable and in accordance with Lane ESD's procedures where not applicable. Employee health, accident, dental and other types of insurance will be as provided in the collective bargaining agreement where applicable and in accordance with the ESD's procedures where not applicable. Mandatory payroll deductions will be withheld as required by state and federal law.

No other automatic deduction except those required by law will be made from an employee's pay without authorization of the superintendent.

No deduction for tax sheltered annuity programs will be accepted without meeting the criterion established by and approved by the employee benefits committee. In no instance shall the numbers of approved programs exceed 12 active accounts.

END OF POLICY

Legal Reference(s):

[ORS 243.650\(10\), \(16\)](#)
[ORS 243.666](#)
[ORS 243.820 to -243.830](#)

[ORS 334.125\(5\)](#)
[ORS 652.110](#)
[ORS 652.120](#)

[ORS 652.610](#)

Lane Education Service District

Code: DL-AR
Adopted: 1/16/97
Readopted: 12/11/01; 4/27/04; 10/01/24
Orig. Code(s): DL-AR

Payroll Choice Procedures

(For Employees Working in Less Than 12-Month Position)

An employee working in a less than 12-month position will have their wages paid in ~~either~~ 12 equal payments, but may choose to have their wages paid in 10 equal payments if requested.

The choice to receive 10 equal payments may be made only once per contract period. A form choosing the 10 equal payments option must be received by the payroll department no later than the 15th of the month of the first scheduled payment and cannot be changed until the following contract period.

Lane Education Service District

Code: DLBA
Adopted: 10/22/02
Readopted: 6/27/06; 7/26/11
Orig. Code(s): DLBA

Advance Salary Payments

All requests for advance salary payments shall be submitted in writing to the superintendent. Advance salary payments are discouraged and shall be requested for emergencies only. Only regular (excluding substitute and temporary) employees will be eligible to receive an advance salary payment. Payment will not exceed the amount of net salary earned at the time of the request.

Advance salary payments submitted within five working days prior to the end of the month will not be authorized.

If approved, the amount of the advance will be reduced by any associated additional processing costs. No more than one advance will be approved in a fiscal year without approval of the Board at a regularly scheduled meeting.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

[ORS 652.140](#)

Lane Education Service District

Code: DLBA-AR
Adopted: 9/24/02
Readopted: 7/15/03; 05/23/06; 6/14/11
Revised/Reviewed:
Orig. Code(s): DLBA-AR

Advance Salary Payment Request

(This AR still applicable? Changes?)

Date: _____

Employee Name: _____

Phone No.: _____

Amount of Request: \$ _____

Pickup _____

Mail _____

Payroll Month: _____

I understand that this is an advance against accrued wages and is to be deducted from my next regular paycheck.

Employee Signature: _____

****If request is approved, payment will be issued by the following work day.****

Advance Salary Payment Request Authorization

Superintendent Approval

Advance salary payment authorized if the above-named employee has sufficient net earnings to cover the amount requested, has had no more than one prior advance salary payments in this fiscal year, and is not within five working days of the end of the month.

Superintendent or designee: _____

Date: _____

Payroll Approval

____ Yes: Regular employee, sufficient net earnings, no prior advances

____ No: Reason for denial _____

Payroll: _____

Date: _____

Business Director: _____

Date: _____

Lane Education Service District

Code: DLC
Adopted: 5/24/94
Readopted: 12/11/01
Orig. Code(s): DLC

Expense Reimbursement

It is the policy of the Board to provide for the payment or reimbursement of actual and necessary expenses incurred by employees in the course of performing the duties and providing the services required, when such expenses are in accordance with Lane ESD rules and the law and are duly authorized by the appropriate administrator.

~~The ESD will provide necessary job-related transportation either through mileage reimbursement for authorized use of a personally-owned vehicle, through the provision of an ESD-owned vehicle or through payment of common carrier fares.~~ The superintendent or designee will develop administrative regulation to implement this policy.

END OF POLICY

Legal Reference(s):

[ORS 294.155](#)

[ORS 334.125\(7\)](#)

[OAR 581-024-0240](#)

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

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

Lane Education Service District

Code: DLC-AR
Adopted: 2/06/24
Orig. Code(s): DLC-AR

Staff Expense Reimbursement

Expense reimbursements for staff traveling on approved ESD business will be governed by the following procedures. Travel expenses include travel fares, meals and lodging, and expenses incident to travel. Only directly attributable travel expenses that are ordinary and necessary in the conduct of approved ESD business purposes are eligible. As used in this administrative regulation, an “ordinary” expense means one that is reasonably priced and commonly accepted in the profession; a “necessary” expense means one that is essential and appropriate in order to conduct ESD business. Procedures established by the ESD will also apply to Board members traveling on ESD business, as applicable.

Authorization

1. All travel for the purpose of ESD business must meet a program, employee or board member need and have prior supervisory approval.
2. Consideration will be given to the number of people attending and whether a single employee or board member is sufficient to gather the information for dissemination to colleagues.
3. Out of state travel requires prior approval by the superintendent or assistant superintendent.
4. All travel expenses must be within appropriated and available funds of the ESD.

Use of Private Vehicles

1. Staff will use ESD-owned vehicles, whenever possible, in conducting ESD business that requires travel within ESD boundaries. Private vehicles may be used in conducting ESD business only with prior supervisory approval.
2. Each employee is responsible for transportation once each duty day from home to regular place of work and home. Mileage reimbursement will be provided for other approved travel to cover activities which are a part of the employee’s designated responsibilities. Employees are entitled to reimbursement for miles traveled between work sites. Employees are also entitled to reimbursement for miles traveled between their regular work site and off-site, work-related activities.
3. Mileage reimbursement for actual miles traveled on ESD business may be approved subject to the following limitations:
 - a. Reimbursement will be made only for those miles actually traveled in the course of completing approved ESD business;
 - b. Group travel may be requested on one travel request form for a group traveling together as long as travel advances and reimbursements are payable to one person who has complete responsibility for reporting expenses;

- c. In the event a private vehicle is approved for use from home, to or from airport or railroad station, mileage for one round trip and economy parking will be reimbursed. Parking receipts are required.
4. Mileage for approved ESD business travel in a private vehicle will be reimbursed at the current rate per mile established by the Internal Revenue Service (IRS). All claims for mileage reimbursement must provide the date of travel, destination, purpose, number of miles driven, and must be submitted within 30 days in which the expense was incurred. Reimbursement claims for expenses incurred after 30 days may be denied, at the discretion of the business services director.
5. Insurance Coverage
 - a. Insurance costs are included as part of the mileage reimbursement for employees authorized to use a private vehicle to conduct ESD business. It is the responsibility of the owner or driver of the vehicle to be certain that the vehicle is adequately covered by insurance that meets or exceeds Oregon statutory minimum limits.
 - b. The responsibility of the ESD for damages resulting from vehicle accidents is not the same as set forth in the ESD's general liability insurance policy. The employee's insurance coverage provides primary coverage when the employee is driving their own vehicle on approved ESD business.

Per Diem Allowances for Meals

1. Meal per diem allowances are provided for approved ESD business purposes for a trip that is overnight, or long enough that the individual conducting business or attending training is away from the regular workplace and cannot access meals through normal channels and still perform their duties.
2. Reimbursement will be made for ordinary and necessary meal expenses incurred in the course of approved travel for ESD business by utilizing meal per diem allowances. Meal per diem allowances include amounts spent for food, beverage, taxes, and related gratuities. Employees receiving meal per diem allowances are not required to furnish receipts to account for and itemize meal expenses.
3. Allowable meal per diem rates are based on the U.S. General Services Administration (GSA) rates. These are tiered rates, based on location, and are set by fiscal year, effective October 1 of each year. If the travel location isn't specified within the GSA charts, the Standard CONUS (contiguous United States) Rate will be applied.
4. Per diem allowances will not be issued for meals included as part of a conference or training event.

Per Diem Allowances for Lodging

1. Lodging per diem allowances are provided for approved ESD business purposes for a trip that is overnight and:
 - a. At least 50 miles from the ESD; and
 - b. Extends beyond a single day; or
 - c. The employee's attendance is required before 9:00 AM on the first day.

2. Reimbursement will be made for ordinary and necessary lodging expenses incurred in the course of approved travel for ESD business by utilizing lodging per diem allowances. Lodging per diem allowances include amounts spent for lodging, taxes, and related fees. Employees receiving lodging per diem allowances are not required to furnish receipts to account for and itemize lodging expenses.
3. Lodging will be reimbursed based on the U.S. General Services Administration (GSA) rates. These are tiered rates, based on location and month, and are set by fiscal year, effective October 1 of each year. If the travel location isn't specified within the GSA charts, the Standard CONUS (contiguous United States) Rate will be applied.

Expense Reimbursement Request and Accounting Procedures

1. Reimbursement requests detailing actual expenditures must be submitted on the ESD's travel expense form and approved by the appropriate immediate supervisor and/or administrator. Original itemized receipts and supporting documentation must accompany all expense reimbursement requests. This includes, but is not limited to, itemized receipts for transportation, lodging, registration, conference, and workshop fees. Meals are to be on the per diem allowance method. All requests must be submitted within 30 working days of the conclusion of the trip.
2. Other reasonable expenses not specifically covered in this administrative rule may be reimbursed if within appropriated and available funds and authorized by the superintendent or assistant superintendent.
3. Expenses which consist primarily of the cost of furnishing meals for others will be reimbursed upon submission of a travel expense report which includes:
 - a. Names of guests;
 - b. Organizations involved; and
 - c. Full explanation of the ESD business purpose of the meeting.
4. In the event the total amount of travel reimbursements received from the ESD by the employee exceeds the ordinary and necessary business expenses and/or the federal meal per diem guidelines, the excess must be reported as income in accordance with IRS requirements.

Travel Advances

Travel advances are normally discouraged; however, they may be authorized in certain situations and with the following guidelines:

1. The advance request must be approved by the superintendent, assistant superintendent, or program director;
2. A detailed accounting of actual expenses must be submitted within 15 days of returning from travel on ESD business;
3. Any balance left over from the advance must be returned with the detailed accounting of actual expenses; and
4. Any balance due to the employee will be processed as a normal reimbursement.

Canceled Trips

1. If an employee cannot leave at the scheduled time, it is their responsibility to contact the commercial carrier and arrange to have the tickets canceled for a refund, exchange, or credit. The traveler is required to take all steps necessary to secure such refunds or credits. Refunds and credits are the property of the ESD.
2. Commercial carrier reservation cancellations must be made at least 24 hours before departure time, whenever possible.
3. Lodging reservations must be canceled by the employee as soon as possible to avoid a cancellation charge.

Personal Travel Combined with ESD Business Travel

1. If an individual traveling on approved ESD business engages in both business and personal activities, travel expenses incurred will be funded only for expenses that are ordinary and necessary in the conduct of ESD business. Expenses incurred as a part of personal business are the sole responsibility of the traveler.
2. When personal travel is combined with approved ESD business travel and the individual is traveling by less than the most expeditious and cost-effective manner, any additional costs must be paid by the traveler.
3. Time away from work caused by traveling by less than the most expeditious means available for personal purposes must be charged to vacation or other appropriate leave.
4. Vacation or other personal leave may be taken in conjunction with approved ESD travel subject to the following:
 - a. Time delays related to approved ESD business are charged as working time even if no work is performed;
 - b. If the employee travels by less than the most cost-effective manner, as determined by the ESD, for approved ESD business or for personal travel combined with travel for ESD business purposes, they must pay the additional cost (e.g., increased fare, meals, lodging expenses, etc.) incurred as a result of the personal travel;
 - c. All subsistence and local transportation (taxi, vehicle fare, etc.) while on vacation status or other appropriate leave must be paid by the employee;
 - d. The traveler will not be required to pay any of the basic transportation costs incurred as a part of the approved ESD business, even though they spend a substantial part of the total time away from home on vacation or other personal leave, provided the employee was traveling on approved ESD business; and
 - e. A traveler who decides on their own to conduct ESD business without prior approval, while on vacation or other personal leave, cannot then use this as a justification to have the ESD pay their basic transportation cost from the ESD to the location visited, or submit a request for other expense reimbursement.

Lane Education Service District

Code: DN
Adopted:

Disposal of ESD Property (Version 1)

The Board may, at any time, declare ESD property as surplus and authorize its disposal when such property is no longer useful to the ESD, unsuitable for use, too costly to repair or obsolete.

If reasonable attempts to dispose of surplus properties fail to produce a monetary return to the ESD, the Board may dispose of them in another manner.

If the ESD property was purchased with state, federal or private grant funds, disposal of the property shall be made as outlined in the grant or by state or federal regulations.

END OF POLICY

Legal Reference(s):

[ORS 279B.055](#)

[ORS 279A, 279B and 279C](#)

[ORS 334.125](#)

EDUCATION, TITLE 34 C.F.R. PART 80 § 80.32(e).

Lane Education Service District

Code: DN
Adopted:

Disposal of ESD Property (Version 2)

The superintendent may dispose of all obsolete, surplus, unwanted and/or excessively damaged equipment and supplies owned by the ESD in accordance with the following procedures:

1. The Board will pass a resolution declaring the property surplus;
2. Items estimated by the [business manager] to have a value of less than [\$100] may be sold by the [business manager] at prices estimated to be the market values of the items. All sales by the [business manager] will be recorded by item, price and buyer;
3. Property or materials estimated by the [business manager] to be greater than [\$100] may be declared surplus and may be sold by the [business manager] through a bidding procedure. If public sales fail to produce any interested buyers or bidders, remaining unsold materials may then, at the superintendent's discretion, be disposed of as scrap or junk or be donated to appropriate charitable or educational agencies.

If the ESD property was purchased with state, federal or private grant funds, disposal of the property shall be made as outlined in the grant or by the state or federal regulations.

END OF POLICY

Legal Reference(s):

[ORS 279B.055](#)

[ORS 279A, 279B](#) and [279C](#)

[ORS 334.125](#)

EDUCATION, TITLE 34 C.F.R. PART 80 § 80.32(e).



2025 OAESD Spring Conference

Agenda

Wednesday, May 7

9:00-12:30 Superintendent Council
 Gathering.....Fireside Room

4:00-6:00 Early Registration
 Homestead Gallery

4:30-6:00 Governance Council Meeting
 Heritage 1 & 2

6:00-8:00 Vendor Reception *All Invited*.....
 Homestead Gallery

Thursday, May 8

7:30-8:30 Registration and Visit with Exhibitors
Homestead Gallery

7:45-8:30 Breakfast sponsored by TBD.....
 Homestead

8:30-10:00 General Session
Homestead

Welcome and Introductions: “Hope Rising: Creating Bright Futures”

- Chair, Will Cahill
- President, Dan Goldman
- PACE Partner Presentation

9:00-9:30 Guest Speaker: Dr. Williams, Director of the Oregon Department of Education

9:30-10:00 Legislative Update, Lori Sattenspiel, Director of Government Relations

10:00-10:15 Break

10:15-11:15 Breakout Session Round 1-.....See Choices

11:15-11:30 Transition to Homestead

11:30-12:45 Banquet Lunch sponsored by TBD
Homestead

- Featured Speaker: Ryan Noss, Oregon Superintendent of the Year
- Awards Ceremony

1:00-2:00 Breakout Sessions Round 2 - see choices below..... See
 Choices

2:00-2:15	Break	
2:15-3:15	Breakout Sessions Round 3- see choices below.....	See
Choices		
3:15-3:30	Break	
3:30-4:30	Breakout Sessions Round 4- see choices below.....	See
Choices		
4:45-6:15	President's Reception.....	
Landmark Gallery		
6:15	Dinner on Your Own	

Friday, May 9

7:45-8:30	Breakfast sponsored by	
TBD.....		Homestead
8:15	Welcome Back & Vendor Raffles	
8:30-11:30	General Session	
.....		Homestead
	<ul style="list-style-type: none"> Featured Speaker: Teacher of the Year 	
9:00-9:15	Break	
9:15	Keynote Speaker: Anatola Araba	
11:00	2025 Conference Announcement & Evaluation	
11:30	Adjourn	

School Improvement Team | Board Report | 05-06-25

Behavioral Health Pathways Specialist: Casey Reid

Casey Reid, PhD, is Lane ESD's new Behavioral Health Pathway Specialist. Her journey with behavioral health began 25 years ago when she was a behavior therapist for children with autism and includes a wide range of experiences supporting and advocating for adolescents through adults in non-profit and higher education environments. Bringing a PhD and in-progress MSW, she brings specializations in trauma-informed care, reform efforts to support student success, literacy and writing instruction, and student development and support. With a career spanning 4 states, 9 institutions, and over 6,000 students, she has held a variety of positions, including being a faculty member and Director of Academic Success at Metropolitan Community College in Kansas City, Director of Developmental Education Programs at East Central College, Lead Coordinator of Academic and Tutoring Services and Writing Center Coordinator at Lane Community College, and Associate Director of Writing and Learning Support at the University of Kansas. In addition to creating a pilot behavioral health pathway program for Lane County students, Casey teaches WR115 for Hope Factory and is part-time faculty at Lane Community College.

Curriculum Leaders

April's Curriculum Leaders meeting focused on Social Science. Please see the full agenda [here](#).

- [Social Sciences Updates](#) with Dr. Leah Dunbar
 - Standards Revision
 - Upcoming Social Sciences Professional Development
 - Instructional Materials Adoption Launch

Native Youth Wellness in the News

Check out this KVAL news story from an amazing day teaching and celebrating Indigenous culture and presence at Thurston High School. Our Native Youth Wellness team, Roshelle Weiser-Nieto and Sheena Puls worked so hard for months to bring this vision to life in collaboration with the Thurston NASU and Five Powers students, the Springfield Museum's Illumination Project, and many others. Thurston students experienced immersive lessons on First Foods, Food Sovereignty, fashion, art and mural-making, language, and more.

<https://kval.com/news/local/springfield-native-americans-show-theyre-still-here-through-on-campus-field-trip-04-21-2025>

Special Education Department Update

May 1, 2025

The Lane ESD Special Education Department is pleased to provide the following updates on our ongoing initiatives and program developments:

Intensive Services Program Location Search

The Special Education Department continues to work closely with special education directors and superintendents from our component districts to identify an appropriate location for our Intensive Services Program. This collaborative effort is focused on finding a facility that meets the specific requirements of the program, including adequate space for specialized instruction, appropriate safety features, and accessibility for students and families throughout our service area, while remaining fiscally responsive to district needs.

SANDI Assessment Implementation in Life Skills Programs

We are excited to announce that beginning in the 2025-26 school year, our Life Skills programs will implement the Student Annual Needs Determination Inventory (SANDI) assessment system. The SANDI is a research-validated assessment tool specifically designed for students with significant cognitive disabilities that offers substantial benefits over our current assessment approach.

The SANDI assessment provides:

- Comprehensive measurement across multiple developmental domains including communication, social emotional skills, motor skills, daily living skills, and academic content areas
- Fine-grained skill progression measures that allow educators to document small but meaningful student growth
- Direct alignment with IEP goal development and progress monitoring
- User-friendly digital interface that reduces teacher paperwork while enhancing data quality
- Robust reporting features that help communicate student progress to families and educational teams.

In preparation for this implementation, our Life Skills teachers and specialists will participate in comprehensive training on the SANDI assessment prior to the beginning of the 25-26 school year. The assessment will allow us to more accurately measure student progress, tailor instruction to specific developmental needs, and document growth in ways that are meaningful for both educational planning and family communication. It also provides hard evidence to districts on effectiveness of LESD Life Skills programming, and the achievement of their students.

May 2025 Board Report

Community and regional Support

- Digital Access

Presentation on EDUROAM went well at the CoSN conference. We will move to the next phase and work towards district support and participation.

- PACE Cybersecurity Insurance

We are currently meeting with a few ESD CIOs and drafting recommendations on next year's requirements and plans regarding technology tool approval and 3rd party security requirements that will further protect our staff and students.

System Upgrades and Improvements

- CyberSecurity:

We have completed phase 3 of the endpoint protection deployment and have moved our focus to the content filter. We are not satisfied with the current level of functionality and performance of our filter. The content filter is what protects the kids from inappropriate content and allows the teachers to monitor the class and while using the chromebooks. This application also provides proactive alerting for self harm and it is imperative that it is functioning at optimum levels.

- LEARN Platform

We have completed the implementation of the new application approval process and development of the tool for managing all of our software and applications for the agency. We are in the feedback and continuous improvement phase. We have started to garner feedback from staff for potential improvements.

- Network Infrastructure

This project ran into issues with the functionality of the equipment and we are working with the company to find a solution. We have put this project on-hold currently to deal with the phone issues.

- Lane ESD telephones

The telephone lines that support our main office and in turn the Westmoreland campus were vandalized. The company that is responsible for these lines has been unresponsive and will not provide any worthwhile timelines for getting the situation resolved. We have not been able to make any progress with this company and these phone lines are a life line to these locations. We sought out another company that can provide this service and we have already

signed a contract to transition over to them instead of waiting on the current company. We have managed to get some key lines and personnel up already and should have the remaining lines back to normal shortly.

- Freshservice- We have completed the rebuild of our ITSM (Information Technology Service Management) system. We are in process improvement for this system currently and will have that wrapped up in the next few weeks. From there we will move to the development of procedures and best practices for the ongoing use and development of this system. This is the system that the vast majority of technology work flows through.