Special Meeting
Tuesday, May 26, 2026 6:00 PM

Dr. Matthew Prophet Education Center - Board Auditorium
501 N. Dixon St
Portland, OR 97227

Agenda

1. 6:00 pm - Call to Order / Opening
2. 6:05 pm - Student Performance
3. 6:15 pm - Student and Public Comment
4. 6:45 pm - 2026–2027 Agreement between Portland Association of Teachers and School District No. 1J, Multnomah County, Oregon (Resolution 7306)
   Vote - Pubic Comment Accepted
5. 6:55 pm. - State of the Arts Annual Report
6. 7:10 pm - Resolution Adopting Guiding Principles and Work Plan in the Rightsizing Process for Portland Public School (Resolution 7307) Vote- Public Comment Accepted
7. 7:40 pm - Data Dive Spring 2026: Student Achievement on MAP and i-Ready Assessments
8. ACCESS Transportation Model Proposal
9. 8:00 pm - Budget Committee Approval of the 2026-27 Budget and the Imposition of Property Taxes (Resolution 7308) Vote- Public Comment Accepted
10. 9:00 pm - Update: Bond Program
11. 9:15 pm - Motion to Rescind Resolution 7291, Resolution to Amend the District's Public Contracting Rules
12. 9:30 pm - Consent Agenda: Resolutions 7309 through 7310 Vote- Public Comment Accepted
    12.(a) Resolution 7309 - Expenditure Contracts
    12.(b) Resolution 7310 - Revenue Contracts
13. Board Committee and Conference Reports (written)
    - Audit Committee
    - Facilities Improvement Oversight Committee
    - Policy Committee
    - Teaching, Learning, & Enrollment Committee
14. 9:35 pm - Other Business, Committee Referrals, and Future Agenda Items
15. 9:40 pm - Adjourn

RESOLUTION No. 7306

2026–2027 Agreement between Portland Association of Teachers and School District No. 1J, Multnomah County, Oregon

RECITALS

The 2026-2027 Collective Bargaining Agreement between School District No. 1J, Multnomah County,Oregon (Portland Public Schools) and the Portland Association of Teachers (PAT) expires on June 30, 2026.

RESOLUTION

The Portland Public Schools Board of Education (Board) adopts and approves the 2026–2027 Collective Bargaining Agreement (PAT CBA) between the Portland Public Schools and PAT, attached hereto as Exhibit A. The Superintendent or designee is authorized to make technical corrections to the Agreement in order to correct typographical and spelling errors, make formatting changes, or renumber provisions, so long as the intended meaning of the Agreement is not thereby altered.

PORTLAND PUBLIC SCHOOLS
Human Resources
501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-2000
Mailing Address: P. O. Box 3107 / 97208-3107

Date: May 26, 2026
To: School Board
From: Kimberly Gibson, Senior Director - Employee and Labor Relations
CC: Dr. Kimberlee Armstrong, Superintendent
Subject: Recommended Ratification of Collective Bargaining Agreement with PAT

We are pleased to present the attached tentative agreement for your ratification. Key terms are:

Duration	One year - through 6/30/2027
Wages	2% increase effective the pay period including January 1, 2027
No other changes to any provisions in the collective bargaining agreement, including current insurance allocation (97%/3%)	

TA KH 5/18/26

TENTATIVE AGREEMENT
May 18, 2026

This Agreement is an amendment to the 2023-2026 collective bargaining agreement ("the collective bargaining agreement") between School District 1J, Multnomah County, Oregon, Portland Public Schools ("PPS") and the Portland Association of Teachers ("the Association").

Recitals:

In light of the significant budgetary constraints identified for the current and next school year, the parties have agreed to the limited changes outlined below to the collective bargaining agreement through June 30, 2027.

The Parties therefore agree as follows:

1. Article 12 will be modified as set forth in the attached.
2. The parties agree to recommend this Tentative Agreement for ratification by the School Board and the bargaining unit respectively, and will make good faith efforts to obtain such ratification by May 22, 2026.

TA.

ARTICLE 12
COMPENSATION

TA KH

12.1 Salary Schedules

12.1.1 Index. The salary schedule indices are set forth in Appendix A-1.

12.1.2 Appendix A-1 sets forth the basic annual salaries. ~~for the period July 1, 2023, through June 30, 2026. The 2023-2024 salary schedule shall be increased by 6.25%. The 2024-2025 salary schedule shall be increased by 4.5%.~~ The ***salary set for the*** 2025-2026 ***school year*** ~~salary schedule~~ shall be increased by ***2% effective January 1, 2027*** ~~3%~~.

* * *

NOTE: The parties acknowledge that the increase will take effect in the middle of a pay period, and will be effective for only a portion of the pay period that runs from December 16, 2026, to January 15, 2027.

State of the Arts

Annual Report

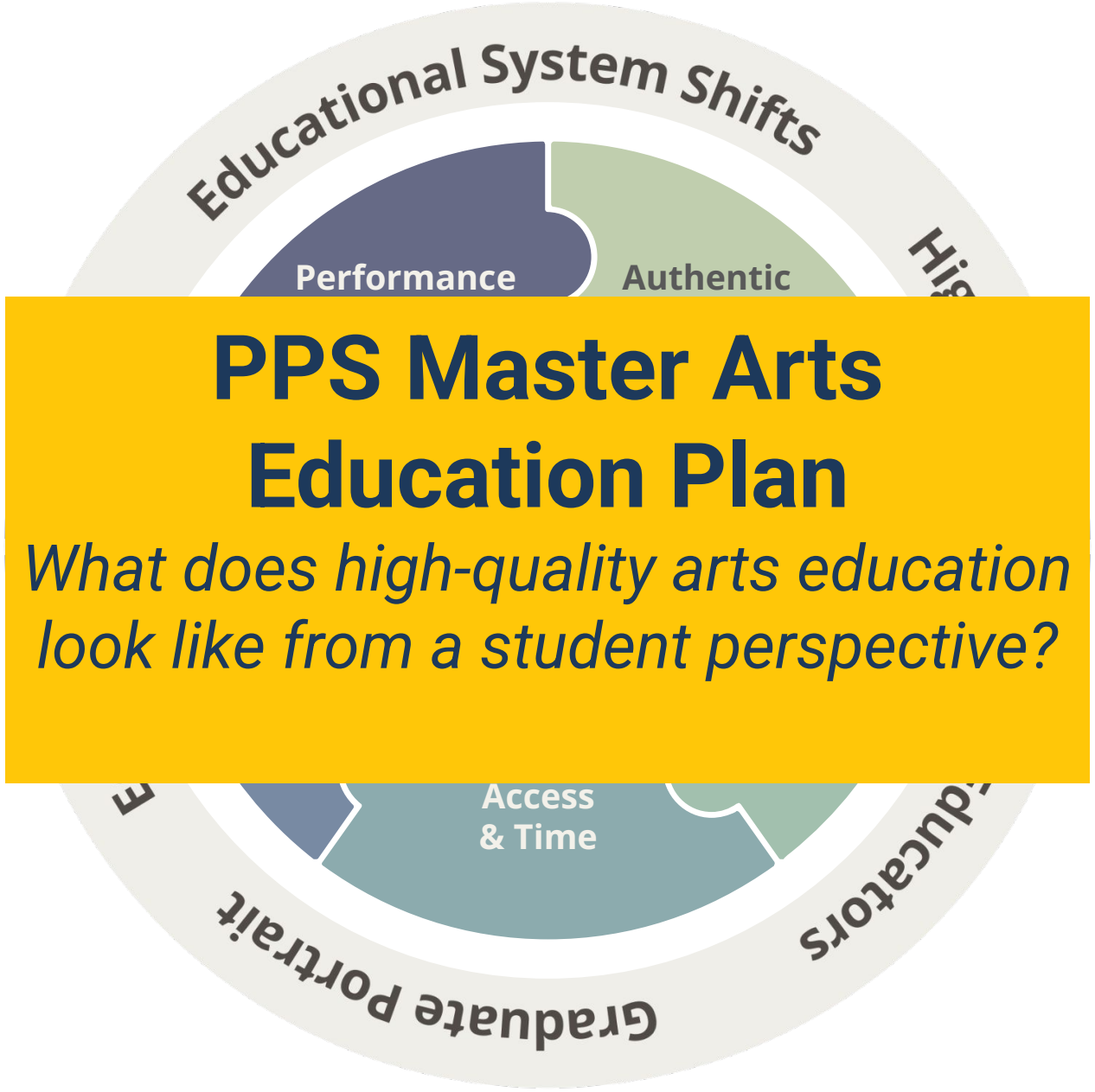
Arts Education Framework Update | May 2026



PORTLAND Public Schools

PPS Arts Education: A Continued Evolution

- Introduction of a shared City of Portland Arts Education Framework
- Increased consistency in reporting across schools and districts
- Greater visibility into access, quality, and student experience
- Opportunity to monitor progress over time



PPS Master Arts Education Plan

What does high-quality arts education look like from a student perspective?

From Vision to Measurement

How do we know if students are experiencing high-quality arts education?

- PPS Master Arts Education Plan defines the student experience of high-quality arts education
- City of Portland Arts Education Framework defines measurable conditions across schools & districts
- Alignment enables consistent monitoring over time
- PPS is well-positioned due to existing system design

City Arts Education Framework Dimensions

- Staffing & System Capacity
- Materials, Equipment & Consumable Supplies
- Facilities & Learning Environments
- Curriculum & Instruction
- Professional Learning & Collaboration
- Arts Partnerships & Community Connections
- Scheduling (Access & Time)
- Equity & Inclusion
- Family & Community Engagement

What This Means Going Forward

How will this be measured, monitored, and made visible over time?

Annual Survey

Annual school & district-level data collection (including surveys)

Pilot Year

2025-26 pilot year allows PPS to review data and prepare

Public Dashboard

Spring 2027, external dashboard increasing visibility across schools and districts

Stakeholder Engagement

Using data with PPS Arts Ed Advisory & Student Voice Committee for ongoing refinement and improvement

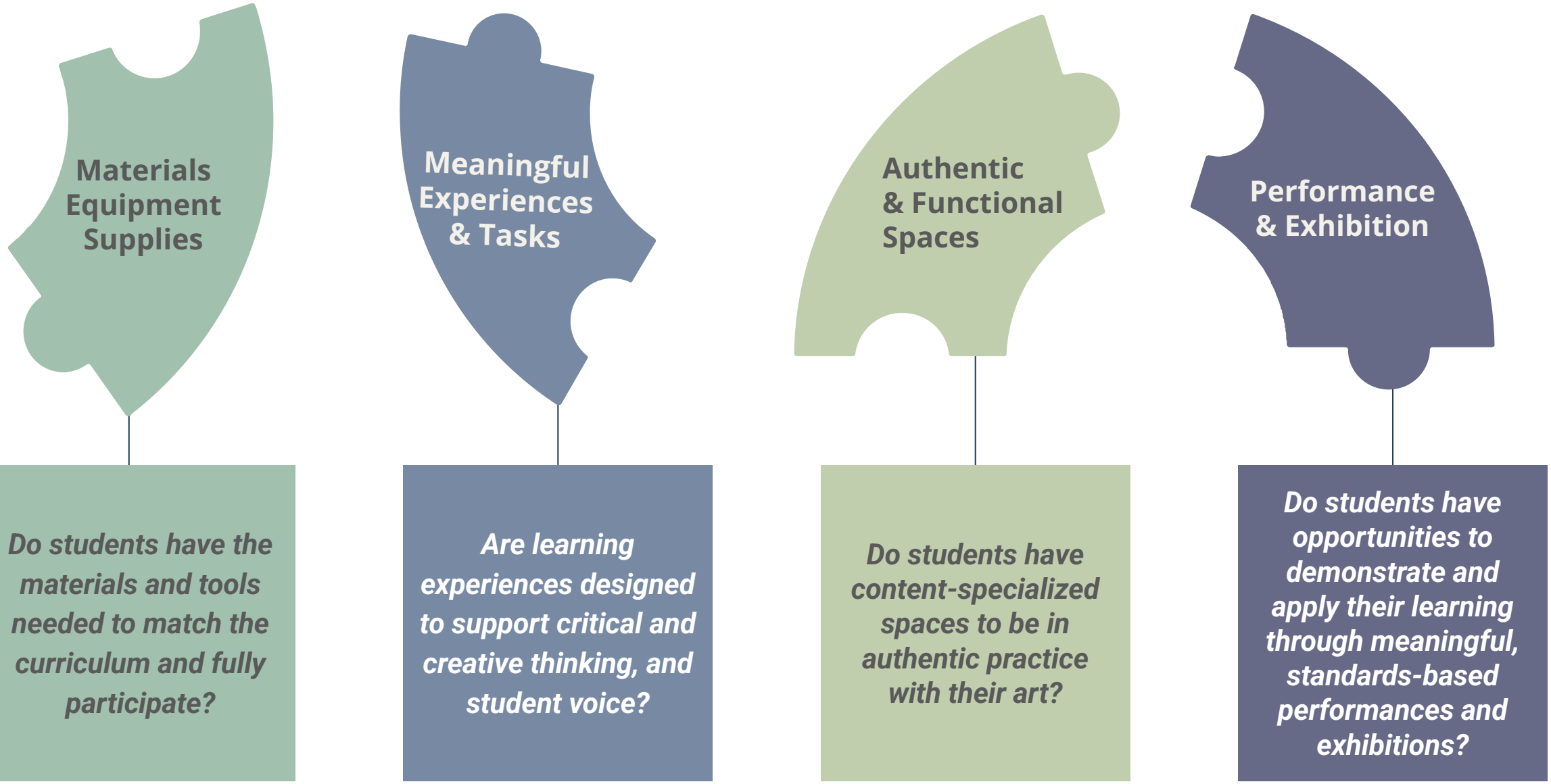
Access & Time

Are students receiving consistent and protected access to arts instruction?

Percentage of Schools By Grand Band Offering VAPA Courses			
Content Area/Grade Band	K-5	MS	HS
Dance	3.51	22.2	38
Music	91.2	88.8	100
Theatre	0	11.1	100
Visual Arts	96.4	100	100

GOAL: Consistent K–12 Pathways to Graduation

MAEP Domains: Access & Time + Four



Student Voice Committee

Flynn Fitzgerald
Student Voice Committee Chair
Senior, Lincoln High School
Cardinals Choir



State of the Arts – Closing

- Building a system that ensures all students experience high-quality arts education

- Aligned to student experience, access, and long-term outcomes



PORTLAND
Public Schools

Date: May 14, 2026

To: Portland Public Schools Board of Education

From: Kristina Howard, Senior Chief of Academics & Schools
Chandra Cooper, Senior Director, Core Enrichments & MTSS
Kristen Brayson, Director, Core Enrichments & Visual & Performing Arts

Subject: PPS 2026 State of the Arts Report

Background

Thirteen years into the City of Portland's Arts Access Fund (Arts Tax) commitment, the students in Portland Public Schools' current graduating class were kindergarteners when arts education was first restored to their schools. Since that time, PPS has worked not only to preserve access to arts education across the district but also to build a more coherent and student-centered arts education system over time.

The development and implementation of the PPS Master Arts Education Plan (MAEP) established a districtwide strategic framework intended to guide this work. Through the MAEP, PPS defined key conditions necessary for equitable, comprehensive, high-quality arts education, including access and time, meaningful learning experiences, student performance and voice, authentic learning spaces, and instructional materials and resources.

At the same time, the City of Portland has continued developing the Portland Arts Education Framework in collaboration with the six Arts Access Fund school districts and researchers from Portland State University. The framework represents an increasing emphasis on consistency, visibility, and accountability around arts education conditions across schools and districts. The current year represents a pilot year for portions of this work and includes annual school-level data collection processes aligned to the City's framework, alongside development of a future public-facing dashboard intended to provide greater visibility into arts education conditions over time.

Strategic Alignment & Implementation

PPS is well-positioned for this work because many of the conditions now being measured through the City's evolving framework are already reflected within the district's existing strategic planning and implementation efforts. Since the launch of the MAEP, PPS has continued expanding and refining arts education systems across multiple areas, including K–12 pathway development, curriculum alignment, district-wide and site-based capstone performance and

exhibition, stakeholder engagement structures, and systems for monitoring implementation over time.

One example highlighted in the accompanying presentation is the Roosevelt cluster, where targeted pathway investments beginning in 2016 expanded music programming from two schools to all schools across the cluster. This cluster-based implementation approach later informed broader district efforts to strengthen pathway continuity and reduce inequities in arts access across PPS school communities. Today, all clusters in PPS offer K-12 pathways of study in both visual and performing arts.

As annual reporting structures and public-facing data systems continue to evolve, PPS will have increasing opportunities to understand better how students experience arts education across schools and over time. The current pilot year provides the district an opportunity to internally review emerging data, identify areas requiring further alignment and support, and continue refining systems prior to broader public-facing implementation.

PPS has also continued investing in structures intended to support stakeholder engagement and continuous improvement, including ongoing collaboration with the PPS Arts Education Advisory Council and the launch of the Student Voice Committee as part of MAEP implementation efforts.

Connection to Board Goals

This work aligns directly with PPS Board goals related to student engagement, belonging, well-rounded educational experiences, robust secondary pathways, and college and career readiness. Recent internal analysis conducted by PPS's Research, Assessment, and Accountability department found that students enrolled in visual and performing arts courses outpaced district averages in both attendance and chronic absenteeism measures between 2023 and 2025, suggesting that sustained participation in arts learning may play an important role in student connection and engagement with school communities.

Ultimately, this work is about more than access alone. It is about ensuring that students across every school community experience arts learning environments that support creativity, critical thinking, cultural literacy, personal voice, belonging, and meaningful participation in school life. As PPS continues implementing the MAEP alongside the evolving City framework, the district remains committed to strengthening the conditions that enable all students to engage in high-quality arts learning experiences over time.

RESOLUTION No. 7307

Resolution Adopting Guiding Principles and Workplan in the Rightsizing Process for Portland Public Schools

RECITALS

A. Whereas Portland Public Schools (PPS) is committed to well-resourced sustainable schools so that every PPS student has equitable access to a robust and high-quality educational experience;

B. Whereas the Student Assignment to Neighborhood Schools Policy 4.10.045-P directs the Superintendent to regularly monitor enrollment, program demand and demographic trends;

C. Whereas PPS enrollment has declined steadily for the past five years and is forecast to continue to decline for at least the next nine years. At the same time, our facilities are aging and costs have increased, forcing resource strains across schools;

D. Whereas on April 14, 2026, the Board of Directors adopted Resolution 7296 directing the Superintendent to launch the Growing Great Schools districtwide rightsizing process to consider school and program consolidations, boundary adjustment, special program changes, and grade reconfigurations;

E. Whereas the Board finds it desirable to adopt Guiding Principles to ensure that the districtwide rightsizing process results in well-resourced, sustainable schools and equitable access for all students; and

F. Whereas the Board finds it desirable to adopt a Workplan for the districtwide rightsizing process that ensures that students, families, and community, as well as financial transparency and stewardship of district resources, are at the forefront of rightsizing decisions.

RESOLUTION

1. Now, therefore, the Board of Directors hereby adopts the districtwide rightsizing Guiding Principles and Workplan, attached as Exhibit 1 hereto.

2. The Board directs the Superintendent to oversee and direct the districtwide rightsizing process in accordance with the Guiding Principles and Workplan.

Exhibit 1 Guiding Principles and Workplan:

Guiding Principles

The following Guiding Principles will establish priorities and guide decision-making at all stages of the rightsizing process:

a. Well-Resourced Schools. Students across Portland Public Schools will attend well-resourced sustainable schools
    i. PPS will provide comparable, sustainable and rich academic programming at all grade spans across the district so that students can attend affirming learning spaces that meet their needs and that are buffered from enrollment fluctuations.
    ii. Descriptions of well resourced schools by grade spans will be drafted and shared with the Board and community and will serve as the aspirational vision that will guide rightsizing decisions.
b. Safe and Healthy Learning Environments. PPS will provide safe, welcoming, and healthy learning environments that are conducive to student success and well-being. We will seek to responsibly steward our resources and maintain a sustainable portfolio of school facilities that support academic programming and long-term operational viability, and prioritize walkability and safe routes to schools.
c. Educational Options. PPS operates a variety of schools and programs, as described in Policy 6.10.022-P, all of which will be part of this rightsizing process.
    i. Neighborhood schools are the foundation of our school system and ensuring access to strong, sustainable neighborhood schools will be a priority.
    ii. Access to choice programs will be balanced with the goal of assuring well-resourced neighborhood schools across our system.
d. PPS Equity Lens. The PPS Equity Lens is a tool to evaluate decisions at all levels, including rightsizing, to disrupt systemic oppression and advance the District's continuous improvement and equity goals. PPS will apply the Equity Lens to inform decision-making which will consider the District's most impacted focal students based upon our data (Native students, Black students, multilingual learners, students receiving special education services, and students experiencing poverty).

Workplan

a. Approach and Analysis
    i. PPS will conduct a comprehensive, data-informed analysis to develop a district-wide rightsizing plan that is designed to support equitable access to well-resourced, academically robust, and fiscally sustainable schools and programs. The analysis will incorporate multiple data sources, including, but not limited to, enrollment trends and projections, program access and parity, student demographics, facility utilization, and financial conditions.
    ii. PPS will be transparent about the data sources used in its analysis.
    iii. In parallel, the District will assess the operational feasibility of potential scenarios, including staffing, transportation, facilities, nutrition services, program continuity, and financial impacts, to confirm that proposed strategies are viable and sustainable.
    iv. Each proposed scenario shall include a standardized equity impact analysis that:
        1. Assesses the impacts on focal student groups using disaggregated data;
        2. Assesses access to specialized programs, including choice schools or programs, and culturally relevant supports, transportation, and proximity
        3. Assesses impacts on school communities that have recently been impacted by recent enrollment and program changes as well as Title I school communities.
        4. Incorporates community input and reflects how feedback informed the recommendation.

b. Community Engagement
    i. PPS will engage the broader community in a structured way to get feedback in multiple phases including guiding principles and scenarios, and the plan for engagement will be shared publicly.
    ii. PPS will intentionally engage with families and educators to receive feedback from a variety of perspectives including from historically underserved communities, communities that have recently

been impacted by enrollment and program balancing decisions and those who will be most impacted by decisions in this process.

c. Implementation Plan
    i. PPS staff will develop an implementation framework to operationalize the rightsizing plan over time in a manner that minimizes disruption for students, families, and staff, including an assessment of cohort cohesion, and supports effective coordination across central office functions. Implementation will be sequenced based on district priorities, urgency of need, and operational readiness.
    ii. The implementation plan will establish key timelines, dependencies, and decision points, including alignment with staffing, budget, and facility planning cycles. It will also identify required resources for students, families, and staff to support continuity of programming and successful transitions for impacted school communities.
    iii. Consistent with PPS' commitment to continuous improvement, implementation will include monitoring, evaluation, and adjustment based on outcomes and lessons learned. PPS will continue to engage students, families, staff, and community partners throughout implementation to inform refinements and support equitable outcomes.
    iv. Staff will present the proposed implementation plan to the Board for final approval.

RESOLUTION No. #

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D. Whereas on April 14, 2026, the Board of Directors adopted Resolution 7296 directing the Superintendent to launch the Growing Great Schools districtwide rightsizing process to consider school and program consolidations, boundary adjustment, special program changes, and grade reconfigurations;

E. Whereas the Board finds it desirable to adopt Guiding Principles to ensure that the districtwide rightsizing process results in well-resourced, sustainable schools and equitable access for all students; and

F. Whereas the Board finds it desirable to adopt a Workplan for the districtwide rightsizing process that ensures that students, families, and community, as well as financial transparency and stewardship of district resources, are at the forefront of rightsizing decisions.

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c. Educational Options. PPS operates a variety of schools and programs, as described in Policy 6.10.022-P, all of which will be part of this rightsizing process~~, with neighborhood schools at the center of the work~~.
   i. Neighborhood schools are the foundation of our school system and ensuring access to strong, sustainable neighborhood schools will be a priority.
   ~~i.~~ii. Access to choice programs will be balanced with the goal of assuring well-resourced neighborhood schools across our system.

d. PPS Equity Lens. The PPS Equity Lens is a tool to evaluate decisions at all levels, including rightsizing, to disrupt systemic oppression and advance the District's continuous improvement and equity goals. PPS will apply the Equity Lens to inform decision-making which will consider ~~student demographics, socioeconomic status, and the needs of special education students and multilingual learners~~ the District's most impacted focal students based upon our data (Native students, Black students, multilingual learners, students receiving special education services, and students experiencing poverty).

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RIGHTSIZE. RIGHT SUPPORT.

RIGHT *for* STUDENTS.

May 26, 2026 Board Meeting

Resolution Revisions

Rightsizing

Factors to Consider from Policy

Right Pathways

A feeder pattern that allows as many students as possible to continue together from one school level to the next

Right Mix of Students

Schools reflect and support the diverse identities of students, including race, language, and background

Right Boundaries

Compact boundaries that promote safer routes to schools and a sense of community as well as recognize and address natural and human-made barriers

Right Use of Space

School buildings are used in ways that support strong programs, full classrooms, and access to resources and opportunities for students

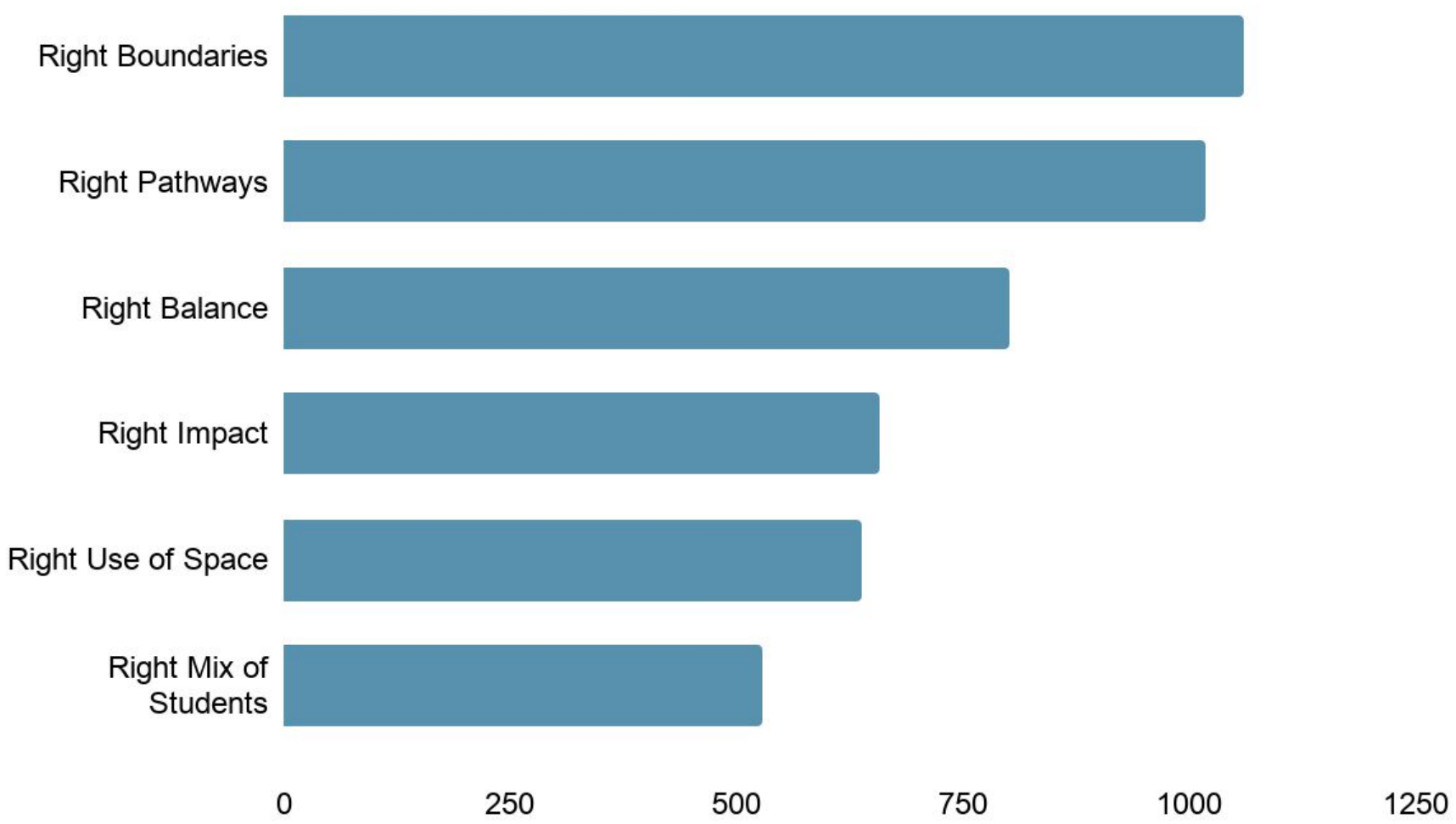
Right Balance

Program and enrollment stability in the surrounding schools

Right Impact

Limiting the impact of boundary changes to the smallest number of students possible

Prioritizing 6 Policy Factors - Online Slido Poll



Responses to the question, "Our Portland Public Schools Student Assignment Policy asks us to consider the following six factors. Please select the three most important factors to consider during program and enrollment balancing across our system."

We estimate that up to 1614 community members participated in the online Slido poll.

5.12 Draft Guiding Principles

Shaping the Work

Well-Resourced Schools

Sustainable, well-resourced schools that provide consistent access to strong academic programming across PPS.

Healthy Learning Environments

Aligning school facilities and learning environments to support student safety, wellness, and long-term sustainability.

Educational Options

Maintaining a strong network of neighborhood schools (while providing a balance of educational options) that are sustainable and well-resourced.

PPS Equity Lens

Using the PPS Equity Lens to guide decision-making and center students most impacted by inequities.

Revised Guiding Principles

Shaping the Work

Well-Resourced Schools

No Revisions

Safe and Healthy Learning Environments

Added "prioritize walkability and safe routes to schools."

Educational Options

Added "Neighborhood schools are the foundation of our school system and ensuring access to strong, sustainable neighborhood schools will be a priority."

PPS Equity Lens

Added "apply the Equity Lens to inform decision-making which will consider the District's most impacted focal students based upon our data."

Revised Work Plan

5.12 Draft	Revision
Implementation Plan (c.i.) ● "PPS staff will develop an implementation framework to operationalize the rightsizing plan over time in a manner that minimizes disruption for students, families, and staff, and supports effective coordination across central office functions."	**Implementation Plan (c.i.)** ● **Added fragmentation language.** ● "...in a manner that minimizes disruption for students, families, and staff, **including an assessment of cohort cohesion,** and supports effective coordination across central office functions."

Key Milestones

Phase	Timeframe	Action
Exploration	Fall 2025 - Winter 2026	Review Outcomes From Southeast Guiding Coalition Deepen Understanding of Lessons Learned and Effective Practices
Plan + Initiate	Winter 2025-26	Compile Current State Analysis + Develop Timeline Form Advisory Committee
Engage + Develop	Spring Summer 2026	Develop Framework and Scenarios Initial Engagement on Scenarios
Study + Recommend	Fall 2026	Continue Stakeholder Engagement + Study and Incorporate Feedback Develop + Present Superintendent's Recommendation
Decide + Commit	Late Fall 2026 (Nov - Dec)	Superintendent Recommends Board Action Board Vote
Implement	Winter - Fall 2027	Complete Staffing + Support School Communities Launch New School Year

RIGHTSIZE. RIGHT SUPPORT.
RIGHT *for* **STUDENTS.**

THANK YOU!

Data Dive Spring 2026

Student Achievement on MAP and i-Ready Assessments



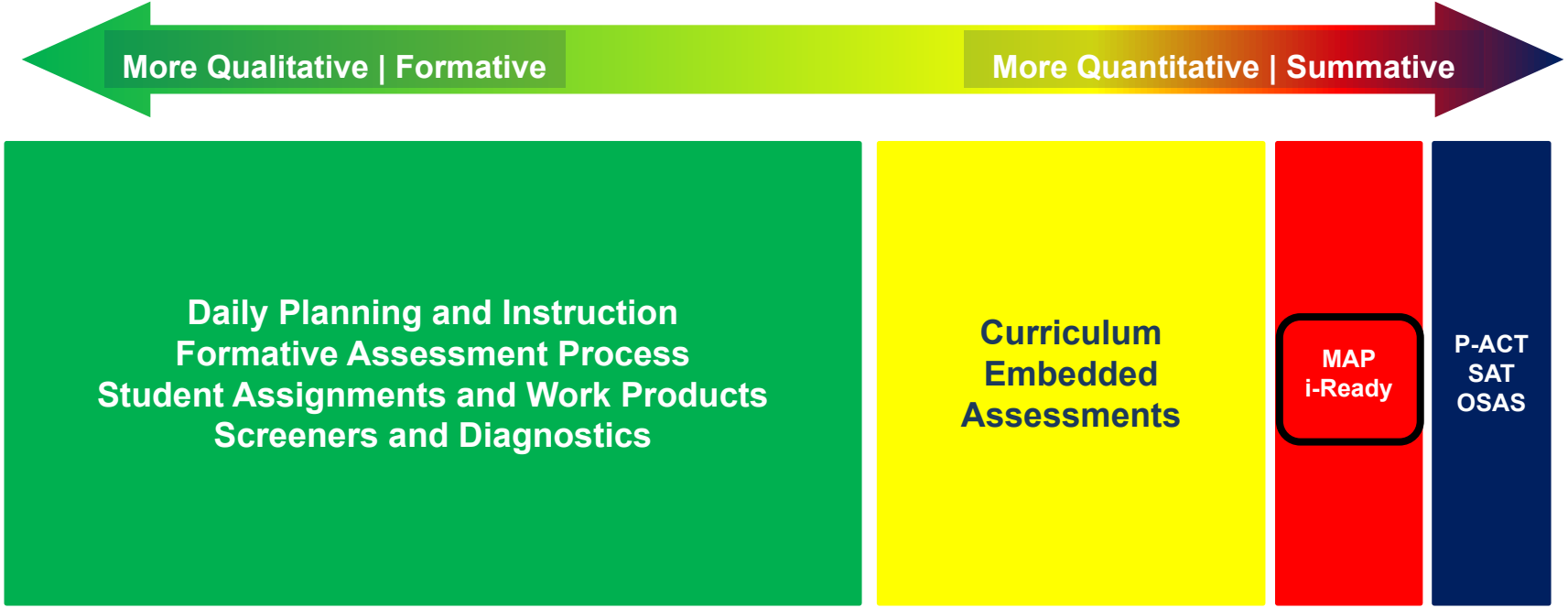
PORTLAND Public Schools

Board of Education Work Session: May 26, 2026

Learning Target and Success Criteria

I am learning about the current state of student achievement based on the results of PPS Benchmark Assessments (MAP and i-Ready).
I can articulate the current state of student achievement and how these data are utilized to inform and drive planning and action in schools and central office.

PPS Balanced Assessment System PK-12



PPS Benchmark Assessments

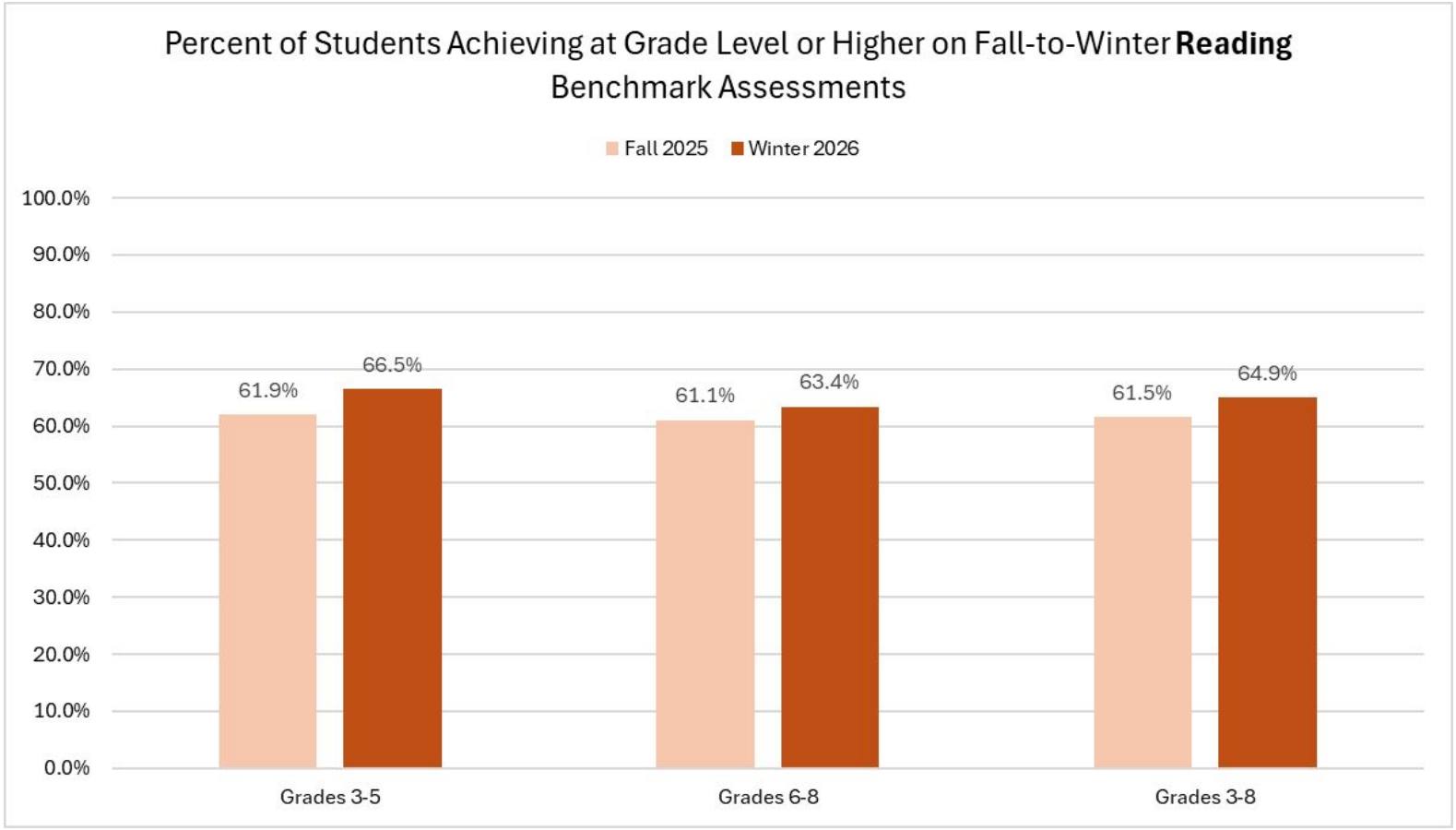
- MAP and i-Ready
- Utilized to monitor student achievement and student growth over time
- Assesses content in Reading and Mathematics in the Fall and Winter
- Answers the question:
  - *What percentage of students are currently on grade level at this point in time in the school year?*

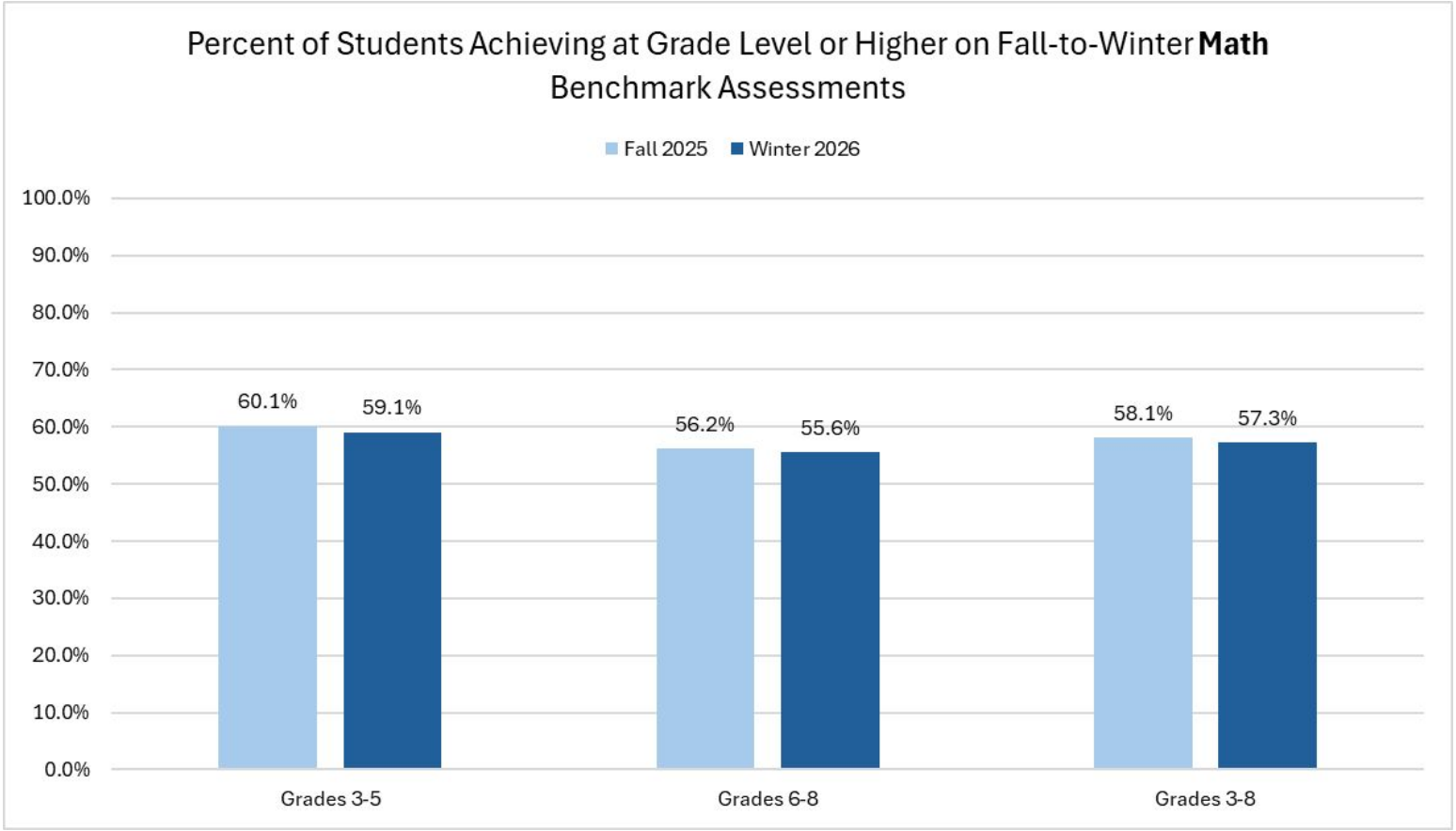


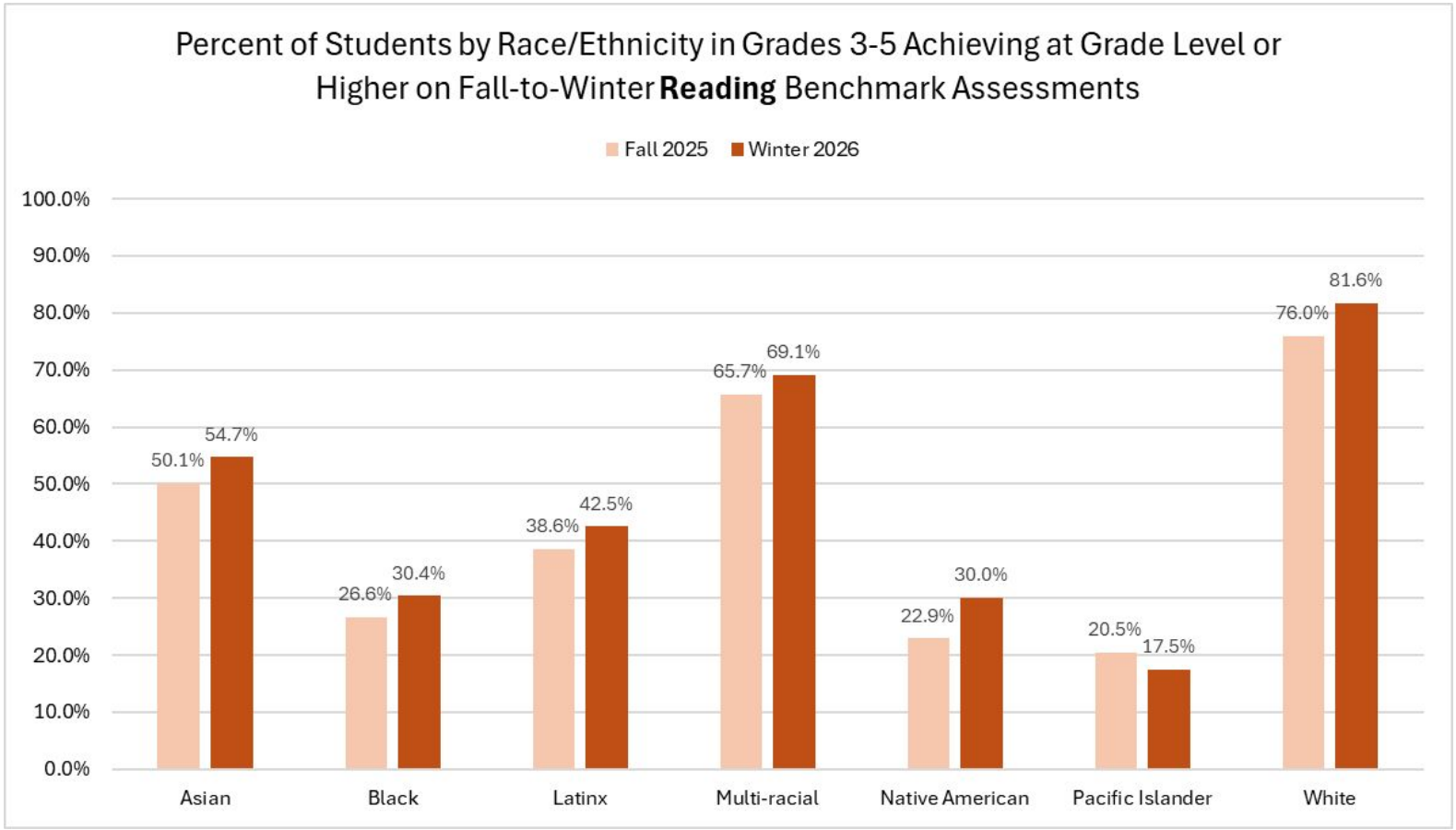
TOGETHER, WE RISE

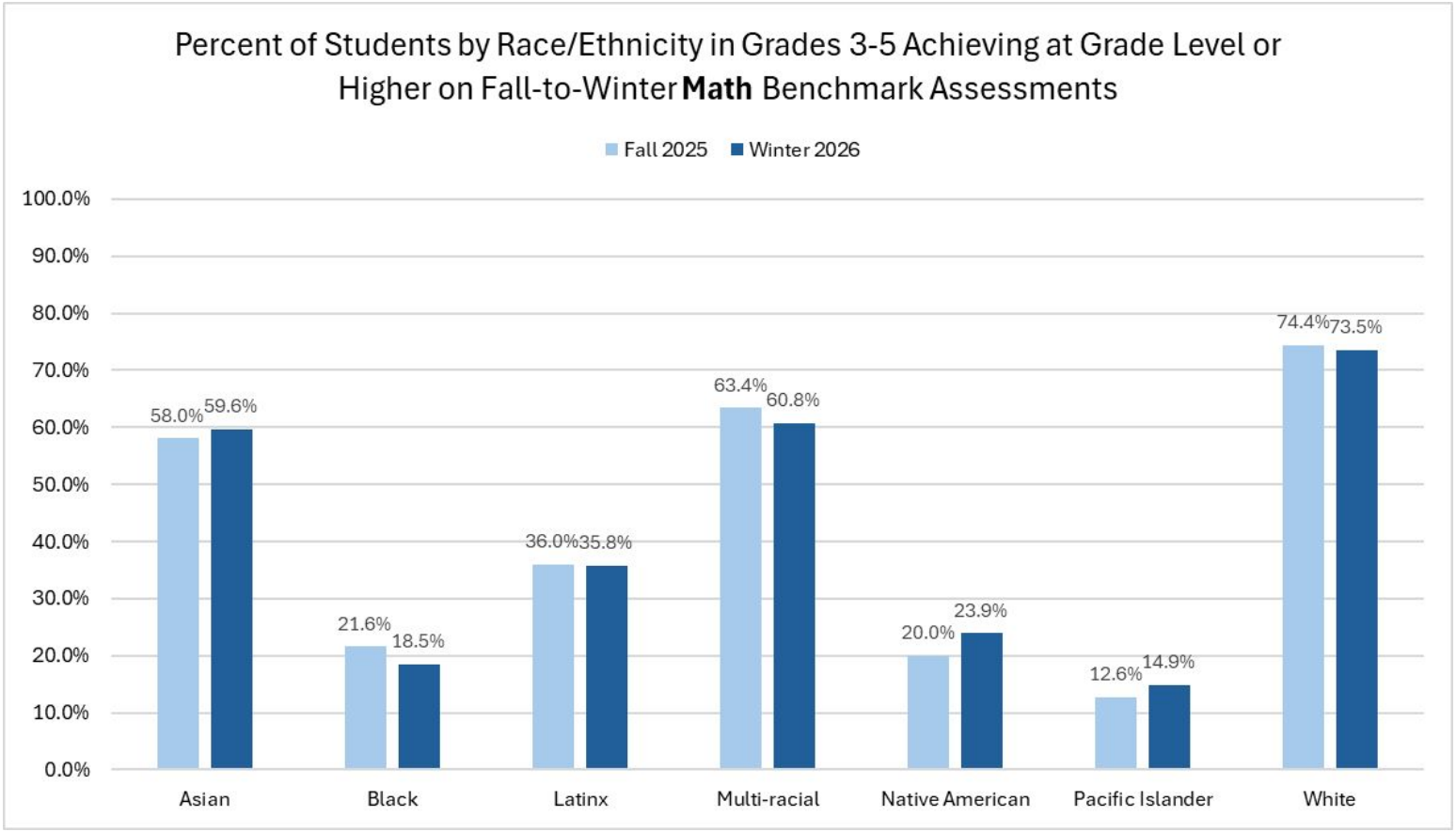
WITH **EXCELLENCE.** WITH **PURPOSE.**

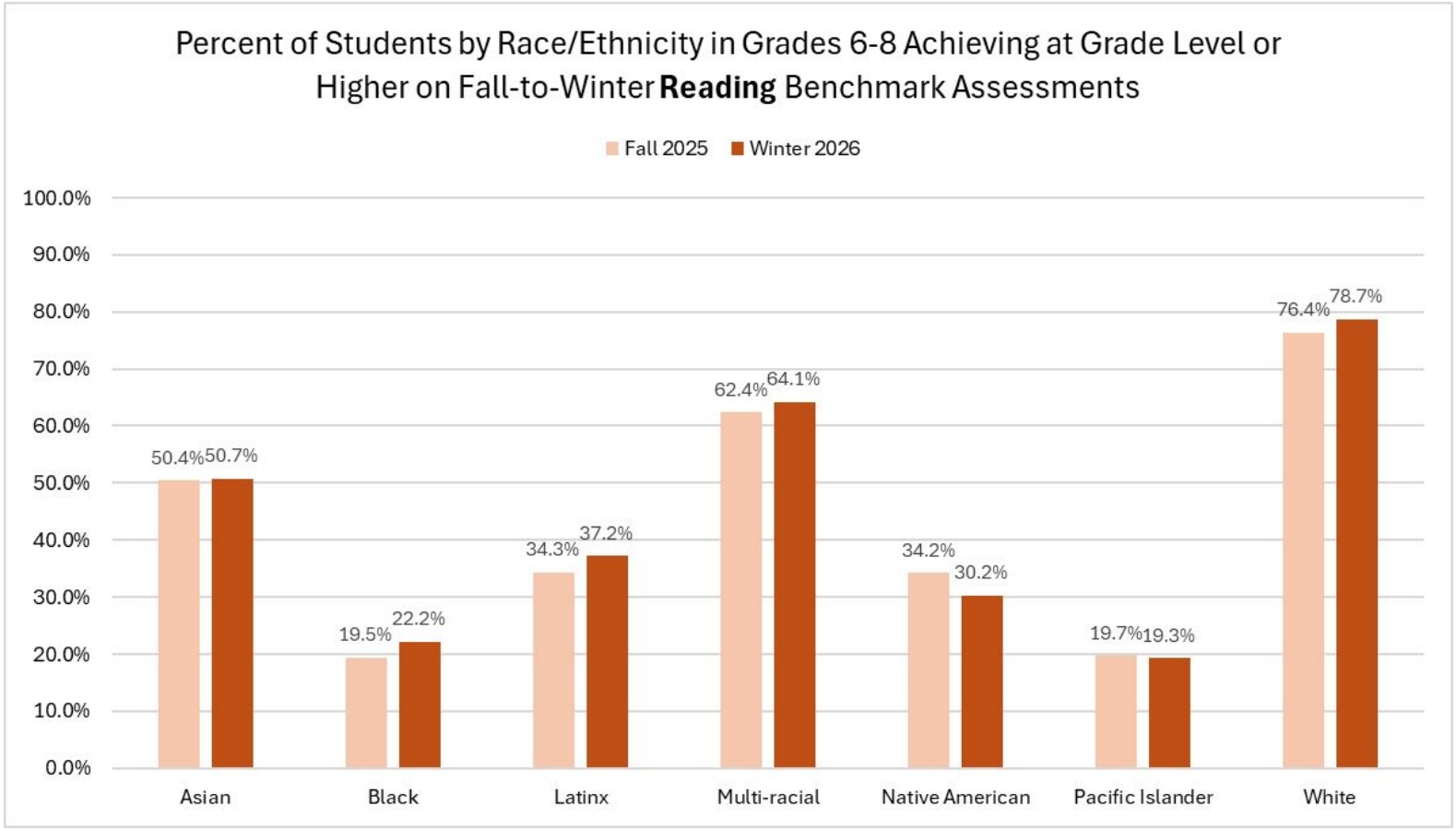
Comparisons of Student Achievement

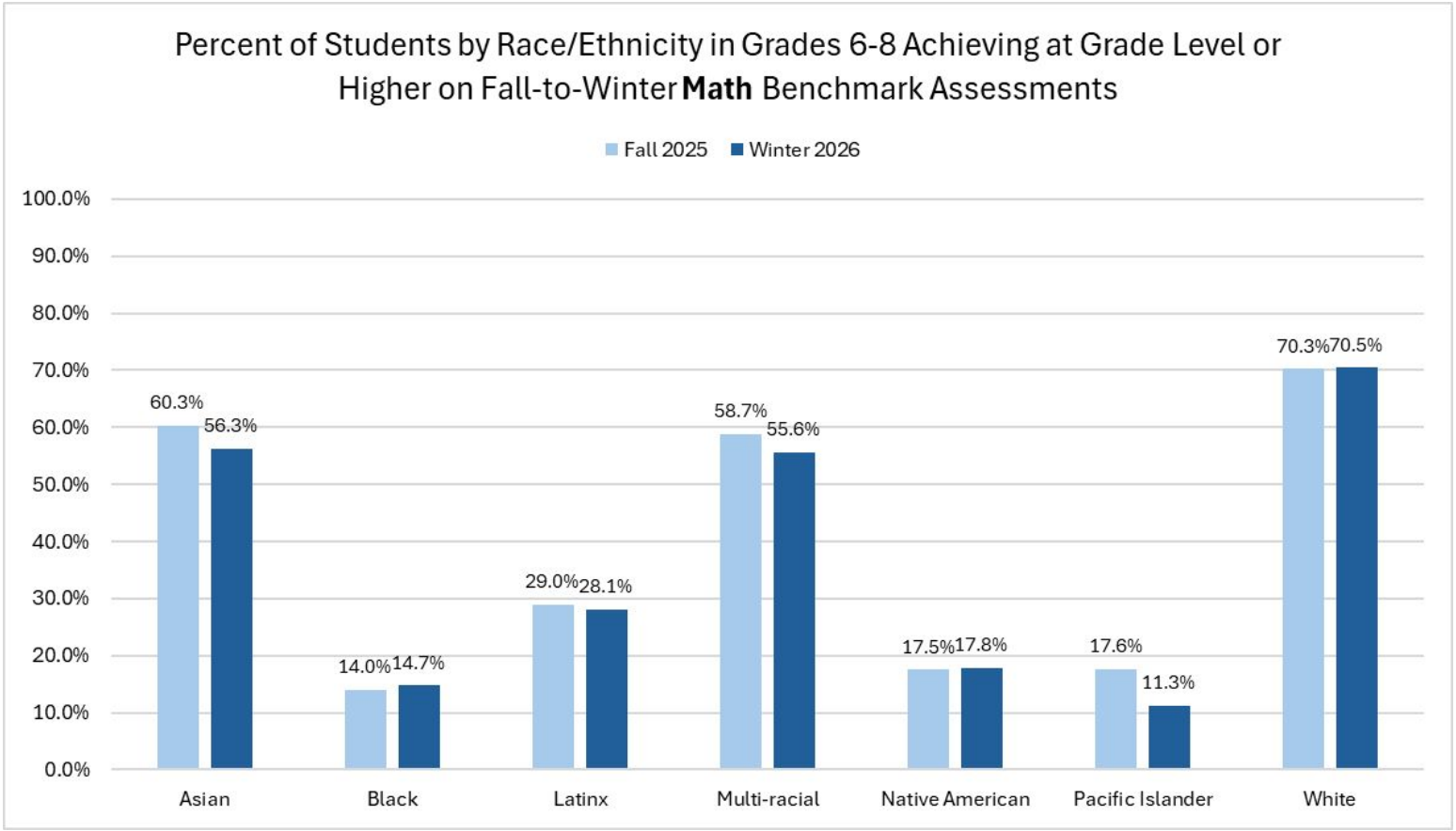

Percent of Students Achieving at Grade Level or Higher on Fall-to-Winter Reading Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
61.9%
66.5%
61.1%
63.4%
61.5%
64.9%
Grades 3-5
Grades 6-8
Grades 3-8

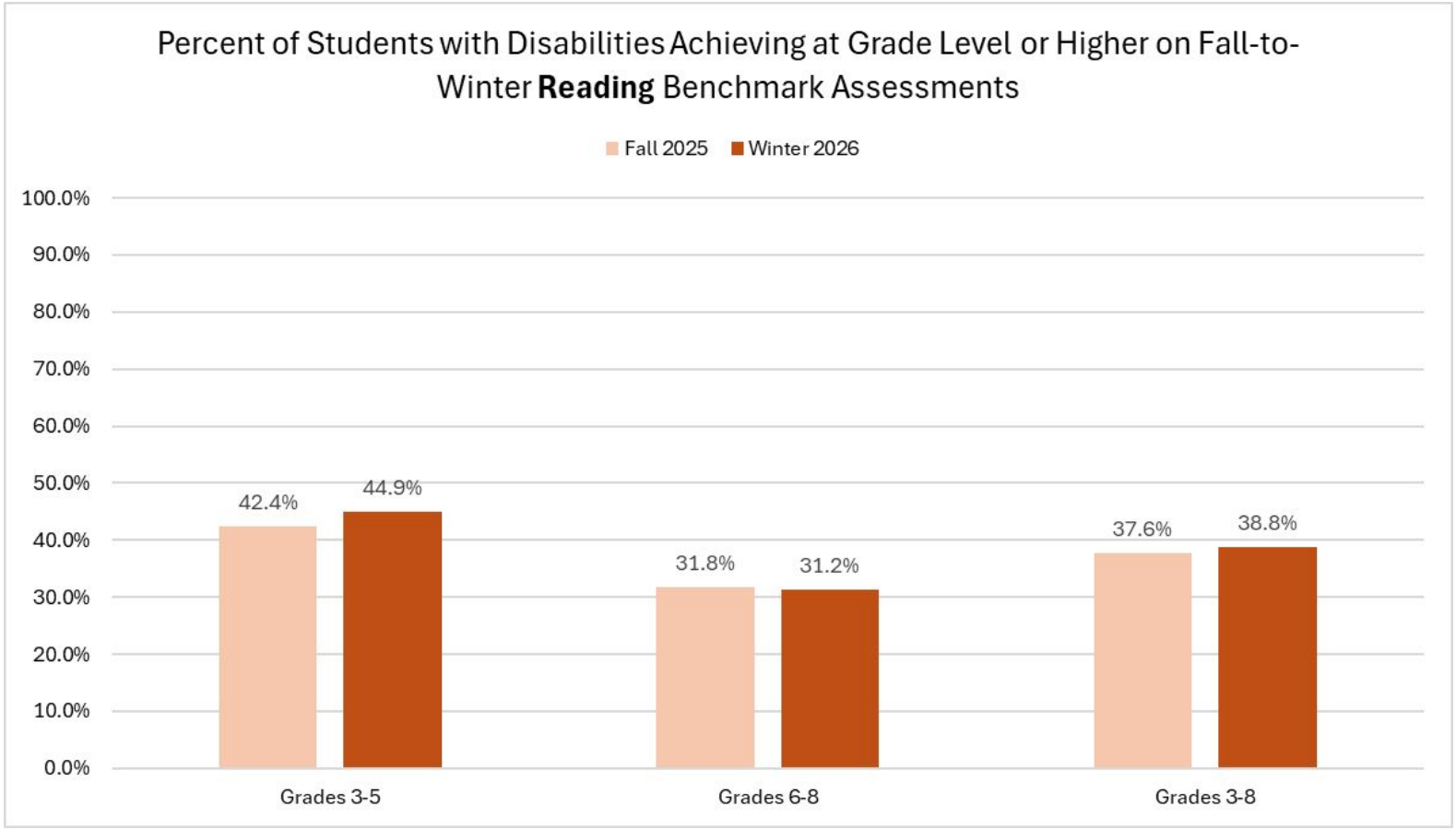

Percent of Students Achieving at Grade Level or Higher on Fall-to-Winter Math Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
60.1%
59.1%
56.2%
55.6%
58.1%
57.3%
Grades 3-5
Grades 6-8
Grades 3-8

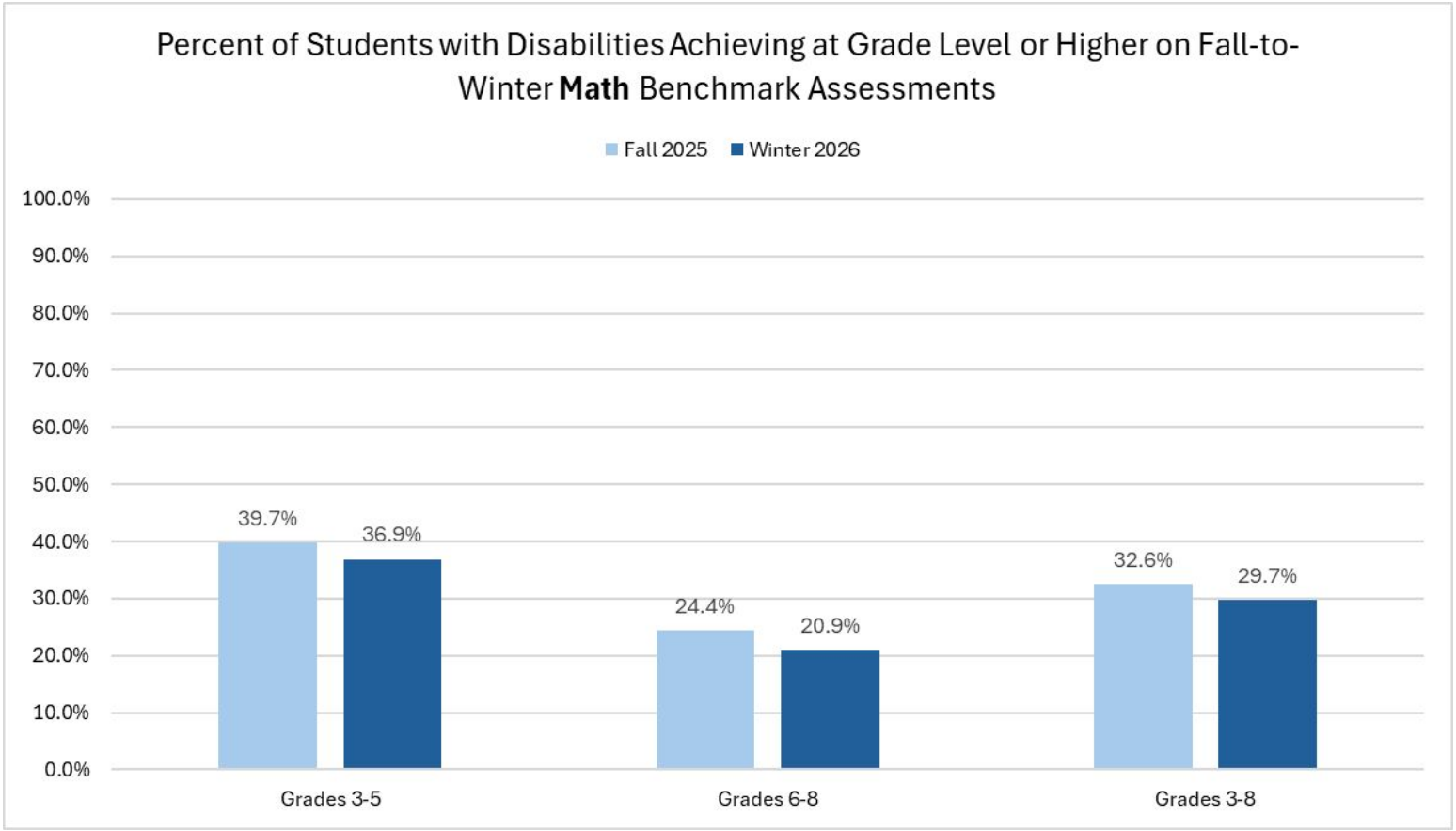

Percent of Students by Race/Ethnicity in Grades 3-5 Achieving at Grade Level or Higher on Fall-to-Winter **Reading** Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
50.1%
54.7%
26.6%
30.4%
38.6%
42.5%
65.7%
69.1%
22.9%
30.0%
20.5%
17.5%
76.0%
81.6%
Asian
Black
Latinx
Multi-racial
Native American
Pacific Islander
White

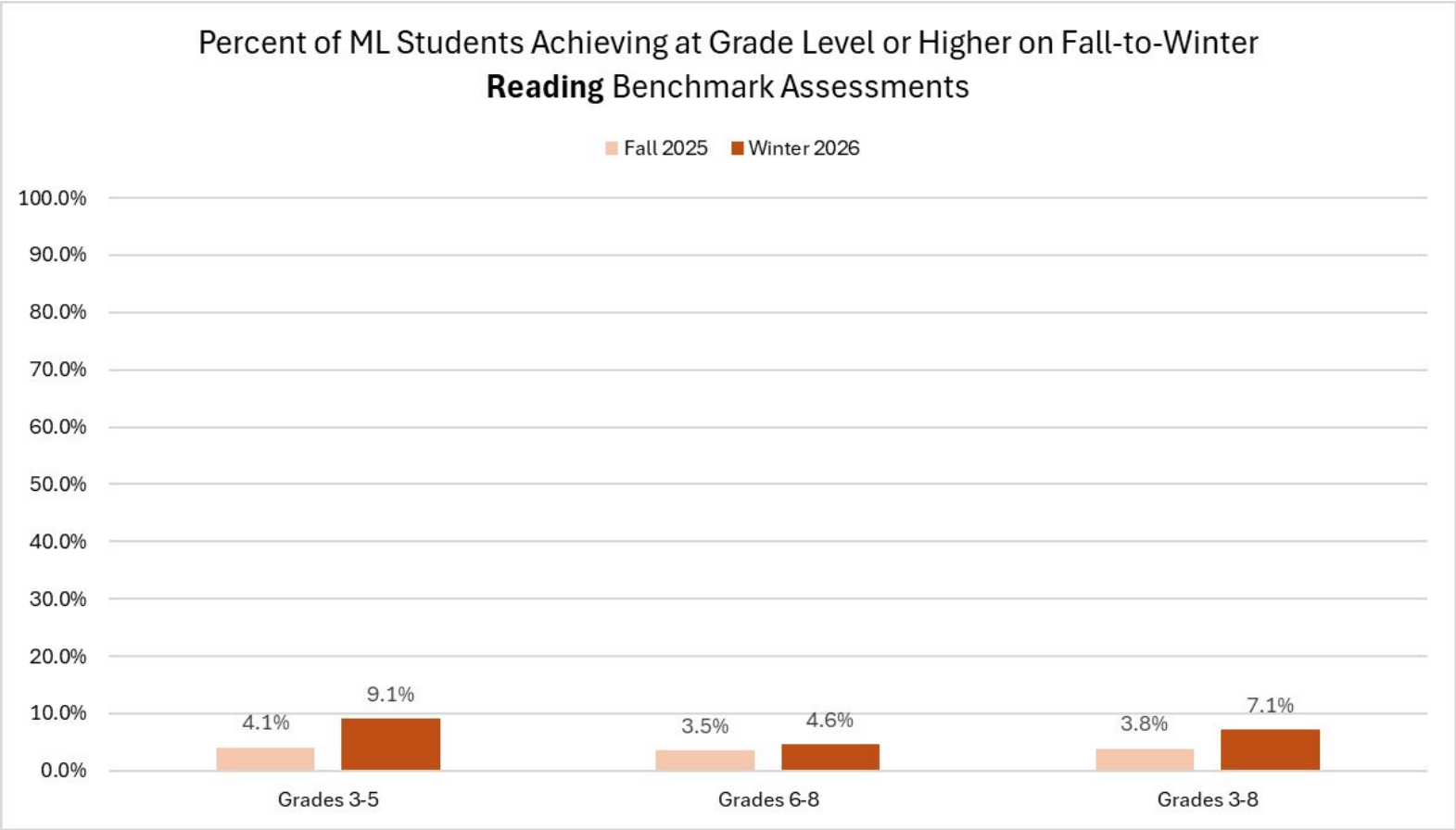

Percent of Students by Race/Ethnicity in Grades 3-5 Achieving at Grade Level or Higher on Fall-to-Winter **Math** Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
58.0%
59.6%
21.6%
18.5%
36.0%
35.8%
63.4%
60.8%
20.0%
23.9%
12.6%
14.9%
74.4%
73.5%
Asian
Black
Latinx
Multi-racial
Native American
Pacific Islander
White

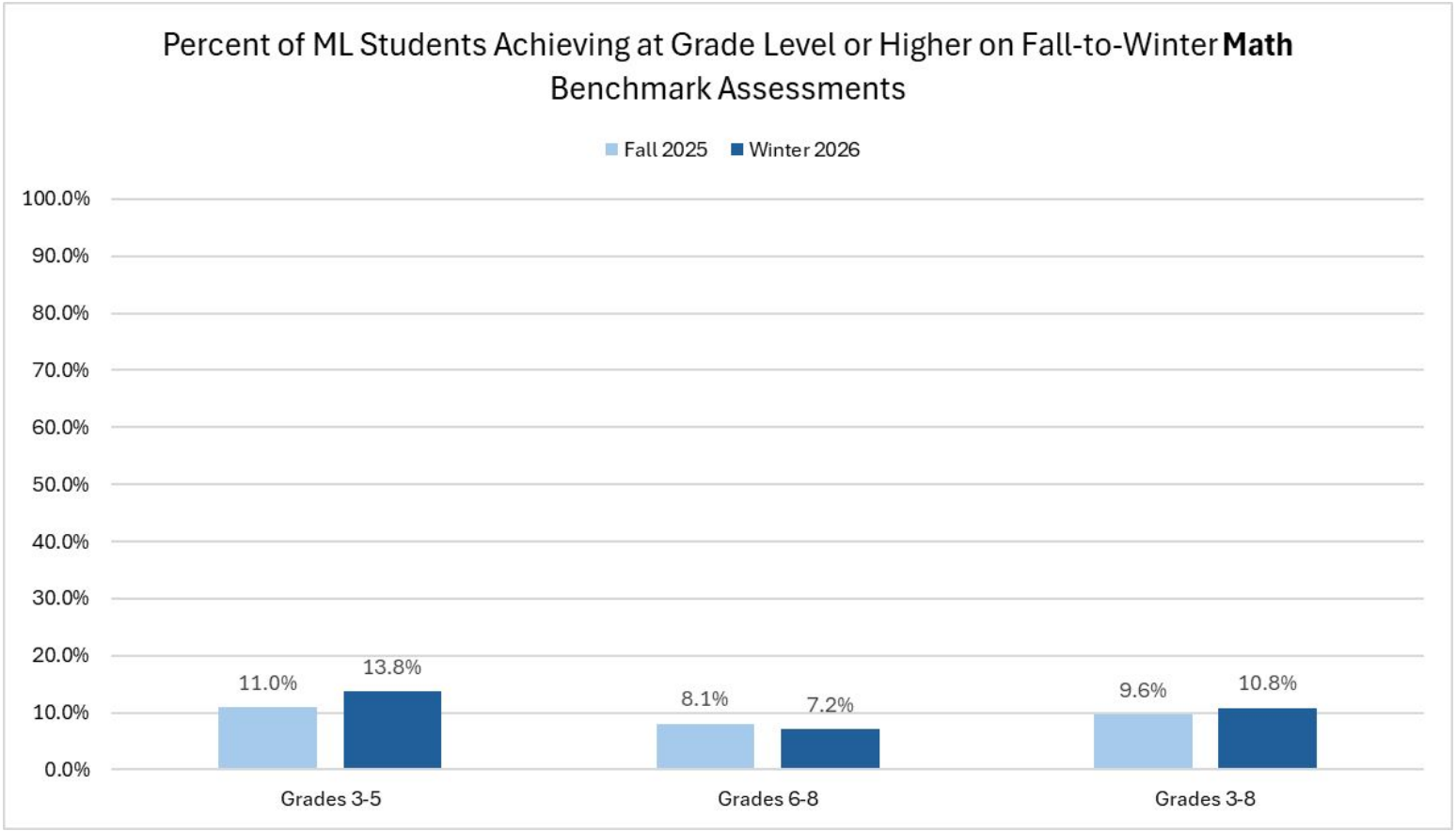

Percent of Students by Race/Ethnicity in Grades 6-8 Achieving at Grade Level or Higher on Fall-to-Winter **Reading** Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
50.4%
50.7%
19.5%
22.2%
34.3%
37.2%
62.4%
64.1%
34.2%
30.2%
19.7%
19.3%
76.4%
78.7%
Asian
Black
Latinx
Multi-racial
Native American
Pacific Islander
White


Percent of Students by Race/Ethnicity in Grades 6-8 Achieving at Grade Level or Higher on Fall-to-Winter **Math** Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
60.3%
56.3%
14.0%
14.7%
29.0%
28.1%
58.7%
55.6%
17.5%
17.8%
17.6%
11.3%
70.3%
70.5%
Asian
Black
Latinx
Multi-racial
Native American
Pacific Islander
White


Percent of Students with Disabilities Achieving at Grade Level or Higher on Fall-to-Winter **Reading** Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
42.4%
44.9%
31.8%
31.2%
37.6%
38.8%
Grades 3-5
Grades 6-8
Grades 3-8


Percent of Students with Disabilities Achieving at Grade Level or Higher on Fall-to-Winter **Math** Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
39.7%
36.9%
24.4%
20.9%
32.6%
29.7%
Grades 3-5
Grades 6-8
Grades 3-8


Percent of ML Students Achieving at Grade Level or Higher on Fall-to-Winter
Reading Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
4.1%
9.1%
3.5%
4.6%
3.8%
7.1%
Grades 3-5
Grades 6-8
Grades 3-8


Percent of ML Students Achieving at Grade Level or Higher on Fall-to-Winter Math Benchmark Assessments
Fall 2025
Winter 2026
100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
11.0%
13.8%
8.1%
7.2%
9.6%
10.8%
Grades 3-5
Grades 6-8
Grades 3-8

Spotlighting Schools: Re g



High Growth/High Achievement

Alameda
Duniway
Stephenson
Laurelhurst
Lewis
Sellwood
daVinci
Odyssey
Winterhaven

High Growth

Arleta
Sabin
Chief Joseph
Rosa Parks
RIgler
Tubman
Faubion
Astor
Robert Gray

Spotlighting Schools: Math tics



High Growth/High Achievement

Ainsworth
Forest Park
Laurelhurst
Bridlemile
Skyline
Mt. Tabor
ACCESS
Beverly Cleary

High Growth

Arleta
Buckman
Chapman
Atkinson
Scott
Tubman
Beaumont
Jackson
Astor

Responding to the Data: Schools and Central Office

- Schools continue to:
  - Provide Grade Level and Standards-Aligned Instruction with supports and scaffolds
  - Provide student academic support via WIN blocks, intervention courses, and personalized instruction

- Central Office continues to:
  - Monitor the mathematics academic program implementation via instructional walks with senior directors of schools to ensure better calibration of instruction across school sites
  - Provide guidance and professional learning to principals on providing practice-changing feedback to strengthen instruction

Q&A




PPS
TOGETHER,
WE RISE
WITH EXCELLENCE. WITH PURPOSE.

Access Academy Hub Model

Student Focused Success Criteria

- Ensure reasonable access to busing
- Balance riders to prevent overloads
- CSI/TSI/Title I stops
- Reduce ride times
- Limit impacts to other schools
- Provide resources for the transition
    - Carpool to school App
    - Safe Routes to School assistance

Budget Focused Success Criteria

- Eliminate 5-6 buses
- Utilize central “hub” stops
- Ensure high capacity utilization
- Keep route times under 40 min
- No dedicated buses

Access Academy Hub Model

Current State

- 10 Bus routes
- 125 total bus stops
- 29 School “hub” stops
- 23 students average per bus
- 71 min average per route
- All buses dedicated
- **$1.5M estimated yearly cost**

Proposed Model

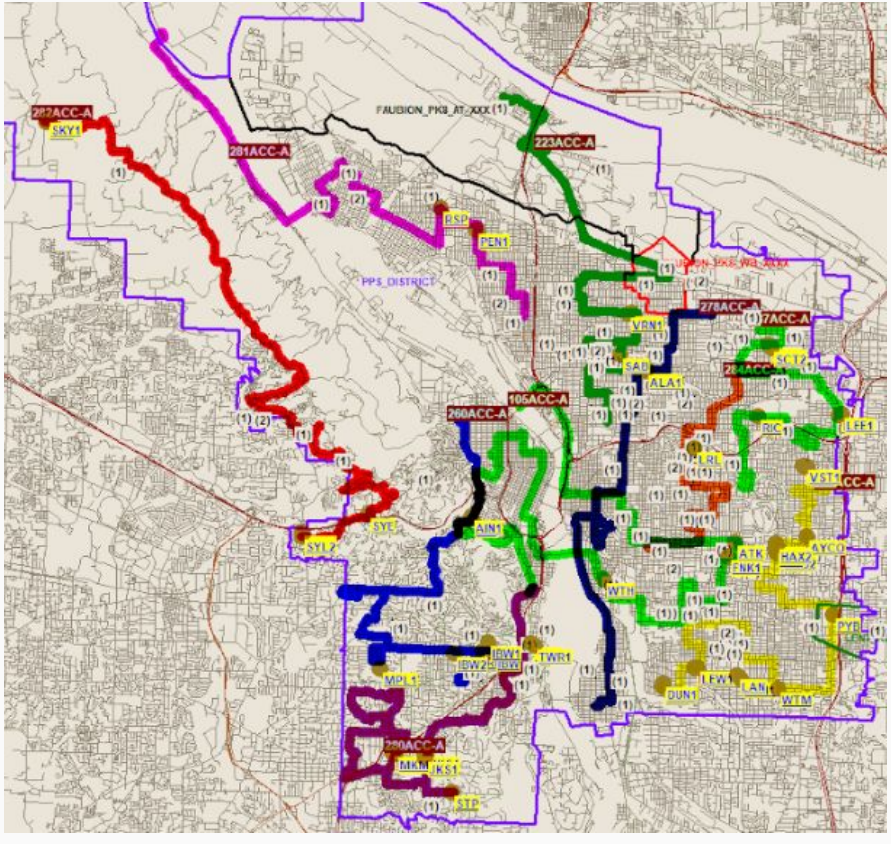
- 5 Bus routes
- 13 total bus stops
- All stops are hub stops
- 46 students average per bus
- 33 min average per route
- All buses have multiple runs
- **$1M conservative savings est.**

Access Academy Routes & Hub Stops

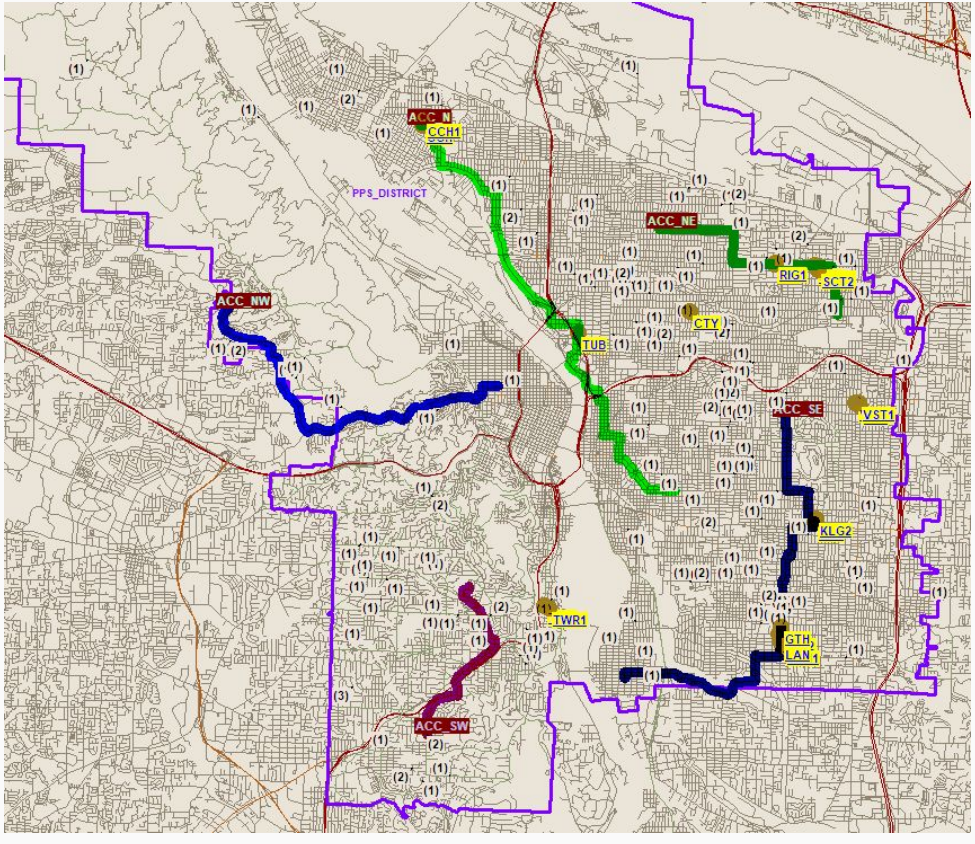
Northwest Route 36 Minutes	**2 STOPS**	Forest Park, MLC
Southwest Route 22 Minutes	**2 STOPS**	Jackson, Gray (CSI/TSI)
Southeast Route 36 Minutes	**4 STOPS**	Mt. Tabor, Kellogg (Title I), Lane (CSI/TSI/Title I), Sellwood
Northeast Route 33 Minutes	**2 STOPS**	Roseway Heights (CSI/TSI/Title I), Vernon
North Route 39 Minutes	**3 STOPS**	Cesar Chavez (CSI/TSI/Title I), Tubman (CSI/TSI/Title I), Hosford

Visual proposal

Current



Proposed



Michelle Morrison
Chief Financial Officer

Portland Public Schools
501 North Dixon Street • Portland, OR 97227
Phone: (503) 916-2000
www.pps.net

MEMORANDUM

Date: May 18, 2026
To: Portland Public Schools Board of Education
From: Michelle Morrison, Chief Financial Officer
CC: Superintendent Kimberlee Armstrong
Subject: 2026-27 Approved Budget

BACKGROUND

On May 26, 2026, the Board (acting as the Budget Committee) is scheduled to vote to approve a budget for Portland Public Schools for the 2026-27 fiscal year. The recommended resolution is attached. The Summary of Adjustments to 2026-27 Proposed Budget reflects no planned changes.

Please note that the resolution sets the upper limits of appropriations for spending and that there will be modifications to activities throughout the year. The information has been presented as a guideline based on the most current information available regarding resources and requirements.

CHANGES FROM THE PROPOSED BUDGET

The Approved Budget is unchanged from the Proposed Budget; all funds have the same resources and requirements as presented in the Proposed Budget.

BUDGET COMMITTEE ACTION

The Board acting as the Budget Committee is asked to consider and approve the attached 2026-27 Approved Budget resolution.

ATTACHMENTS

A. Summary of Adjustments to 2026-27 Proposed Budget (Schedule of Appropriations)

B. 2026-27 Approved Budget Resolution

Attachment A

Portland Public Schools

Adjustments to the 2026-27 Proposed Budget

May 26, 2026

	Proposed Budget	Adjustment	Recommended Approved Budget
100 - General Funds			
Resources			
Beginning Fund Balance	41,000,000	-	41,000,000
Local Property and Other Taxes	358,223,285	-	358,223,285
Local Option Taxes	103,938,000	-	103,938,000
Other Local Sources	28,701,056	-	28,701,056
County and Intermediate Sources	9,791,000	-	9,791,000
State Sources	317,100,000	-	317,100,000
Federal Sources	415,000	-	415,000
Interfund Transfers	393,716	-	393,716
Other	2,550,000	-	2,550,000
Total	862,112,056	0	862,112,056
Requirements			
Instruction	458,887,971	-	458,887,971
Support Services	345,021,368	-	345,021,368
Enterprise and Community Svcs	2,391,114	-	2,391,114
Debt Service	1,000	-	1,000
Transfers of Funds	14,755,000	-	14,755,000
Contingency	41,055,603	-	41,055,603
Total	862,112,056	0	862,112,056
200 - Special Revenue Funds			
Resources			
Beginning Fund Balance	23,223,782	-	23,223,782
Property and Other Taxes	393,716	-	393,716
Other Revenue from Local Sources	21,405,562	-	21,405,562
Intermediate Sources	15,895,167	-	15,895,167
State Sources	100,299,777	-	100,299,777
Federal Sources	62,662,681	-	62,662,681
Interfund Transfers	55,000	-	55,000
All Other Resources	-	-	-
Total	223,935,685	0	223,935,685
Requirements			
Instruction	96,244,503	-	96,244,503
Support Services	85,490,922	-	85,490,922
Enterprise and Community Svcs	29,550,380	-	29,550,380
Facilities Acquisition and Construction	12,256,164	-	12,256,164
Transfer of Funds	393,716	-	393,716
Contingency	-	-	-
Unappropriated Ending Fund Balance	-	-	-
Total	223,935,685	0	223,935,685

300 - Debt Service Funds

Resources

Beginning Fund Balance	3,000,000	-	3,000,000
Property and Other Taxes	174,944,669	-	174,944,669
Other Revenue from Local Sources	100,313,225	-	100,313,225
Interfund Transfers	618,253	-	618,253
Total	278,876,147	0	278,876,147

Requirements

Debt Service	278,876,147	-	278,876,147
Contingency	-	-	-
Unappropriated Ending Fund Balance	-	-	-
Total	278,876,147	0	278,876,147

400 - Capital Projects Funds

Resources

Beginning Fund Balance	1,349,309,883	-	1,349,309,883
Other Revenue from Local Sources	32,689,927	-	32,689,927
Intermediate Sources	-	-	-
State Sources	508,013	-	508,013
Bond Proceeds & Premiums	-	-	-
Interfund Transfers	-	-	-
All Other Resources	-	-	-
Total	1,382,507,823	0	1,382,507,823

Requirements

Support Services	1,501,462	-	1,501,462
Enterprise and Community Svcs	-	-	-
Facilities Acquisition and Construction	1,380,387,643	-	1,380,387,643
Debt Service	-	-	-
Transfers of Funds	618,718	-	618,718
Total	1,382,507,823	0	1,382,507,823

600 - Internal Service Funds

Resources

Beginning Fund Balance	2,300,000	-	2,300,000
Other Revenue from Local Sources	4,159,167	-	4,159,167
Transfers of Funds	14,700,000	-	14,700,000
Total	21,159,167	0	21,159,167

Requirements

Support Services	21,159,167	-	21,159,167
Contingency	-	-	-
Total	21,159,167	0	21,159,167

All Funds Total	2,768,590,878	0	2,768,590,878

RESOLUTION NO. 7308

Budget Committee Approval of the 2026-27 Budget and the Imposition of Property Taxes

RECITALS

A. Oregon Local Budget Law, Oregon Revised Statute (ORS) 294.426, requires the Budget Committee of Portland Public Schools (District) to hold one or more meetings to receive the budget message and the budget document and to provide members of the public with an opportunity to ask questions about and comment upon the budget document.

B. On April 28, 2026, the Board of Education (Board), acting as the Budget Committee, received the Superintendent's budget message and Proposed Budget document for the 2026-27 fiscal year.

C. ORS 294.431, requires submission of the budget document to the Tax Supervising Conservation Commission (TSCC) by May 15 of each year. ORS 294.431 allows taxing jurisdictions to request an extension of the submission date.

D. The District requested, and the TSCC authorized, extending the submission date to no later than May 28, 2026.

E. The Board-appointed Community Budget Review Committee (CBRC) reviewed the Proposed Budget. The CBRC acts in an advisory capacity to the Board.

F. On May 12, 2026, the Budget Committee received a 2026-27 budget review and recommendations from the CBRC. The committee deferred submission of Local Option Levy reporting.

G. On May 13, 2026, the Budget Committee held a Budget Community Engagement meeting to discuss and receive public comment on the Proposed Budget.

H. ORS 294.428 requires that each legal jurisdiction's Budget Committee approve a budget and specify the *ad valorem* property tax amount or rate for all funds.

I. It is noted that $0.5038 per $1,000 of the assessed value of the Permanent Rate Tax Levy (commonly known as the "Gap Tax") and, based on an analysis presented to the Board, the entirety of the Local Option Tax Rate Levy are excluded from State School Fund calculations.

J. ORS 457.445(6)(d) provides the opportunity for a school district with a statutory rate limit on July 1, 2003, that is greater than $4.50 per $1,000 of assessed value to be excluded from the urban renewal division of tax calculations. To the extent that the rate limit was increased under section 11 (5)(d), Article XI, of the Oregon Constitution, property tax revenue from said increase is excluded from local revenues. The District will notify the county assessors of the rate to be excluded for the current fiscal year no later than July 15.

K. Portland Public Schools has a statutory rate limit that is in excess of the $4.50 limitation that includes an increase under section 11 (5)(d), Article XI, of the Oregon Constitution.

RESOLUTION

1. The Budget Committee approves the budget as summarized in Attachment "A".

2. The Budget Committee approves the budget for the 2026-27 fiscal year in the total amount of $2,768,590,878.

3. The Budget Committee resolves that the District imposes the taxes provided for in the approved budget:

a. At the rate of $5.2781 per $1,000 of assessed value for operations;
b. At the rate of $1.9900 per $1,000 of assessed value for local option tax for operations;
c. In the amount of $184,250,000 for exempt bonds

Taxes are hereby imposed and categorized for the tax year 2025-26 upon the assessed value of all taxable property in the District, as follows:

Type	Education Limitation	Excluded from Limitation
Permanent Rate Tax Levy	$5.2781/$1,000 of assessed valuation	
Local Option Rate tax Levy	$1.9900/$1,000 of assessed valuation	
Bonded Debt Levy		$184,250,000

4. The Budget Committee further resolves that $0.5038 per $1,000 of taxable assessed value is excluded from the division of tax calculations, as the Permanent Rate Tax Levy attributable to the increase provided in section 11 (5)(d), Article XI, of the Oregon Constitution (such increase is a result of the expiring Gap Tax Levy).

5. The Budget Committee directs submission of the 2026-27 Approved Budget to the TSCC by May 28, 2026, in accordance with ORS 294.431, under the extension as granted by the TSCC.

Attachment A

Portland Public Schools

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May 26, 2026

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Requirements

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Facilities Acquisition and Construction	1,380,387,643	-	1,380,387,643
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Total	21,159,167	0	21,159,167

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Contingency	-	-	-
Total	21,159,167	0	21,159,167

All Funds Total	2,768,590,878	0	2,768,590,878



PORTLAND PUBLIC SCHOOLS

2026-27 PROPOSED BUDGET

VOLUME #1

FISCAL YEAR JULY 1, 2026 - JUNE 30, 2027

Portland Public Schools
School District No . 1J,
Multnomah County, Oregon

www.pps.net

Cover artwork created by: Luci G., Grade 6, Timeless, Roseway Heights Middle School

501 N DIXON STREET, PORTLAND, OREGON 97227

ASSOCIATION OF SCHOOL BUSINESS OFFICIALS INTERNATIONAL

This Meritorious Budget Award is presented to:

PORTLAND PUBLIC SCHOOLS

for excellence in the preparation and issuance of its budget
for the Fiscal Year 2025–2026.

The budget adheres to the principles and standards
of ASBO International's Meritorious Budget Award criteria.

MERITORIOUS BUDGET AWARD

Ryan S. Stechschulte
President

James M. Rowan, CAE, SFO
CEO/Executive Director



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Board of Education Policy
1.80.020-P

PORTLAND PUBLIC SCHOOLS
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Note: In addition to the Proposed Budget, the District has compiled Individual School Reports to accompany this document relaying specific budget, staffing, student demographics, and student achievement information for each school in Portland Public Schools. The supplemental document is available on the district website Budget Office page.



Kelly Elementary School - Leap and Summer Programs, July 2025



Jefferson High School - Open House, December 18, 2025

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

The executive summary includes the Budget Message and a comprehensive narrative overview of the budget. The narrative presents the budget in the context of the District's Board Goals, vision, and Continuous Improvement Plan. In addition, summary budget information is presented in tabular and graphic format including student enrollment history and projections and budget forecasts.

The School Board, acting as the Budget Committee, is responsible for oversight and approval of the budget. The School Board adopts the budget, makes appropriations and imposes taxes.

The Budget Overview highlights major budget changes year-over-year.

Jefferson High School - Orange Shirt Day, September 25, 2025

SUPERINTENDENT'S BUDGET MESSAGE

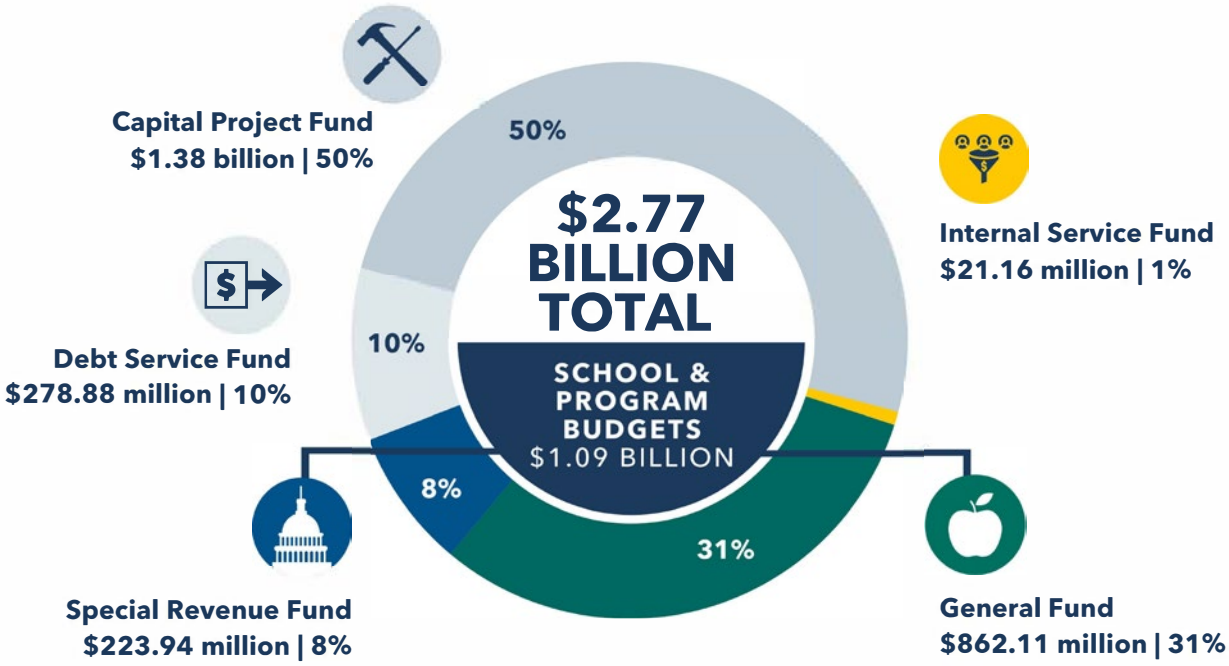
The Superintendent's formal budget message will be presented to the Budget Committee during the public meeting on April 28, 2026.

Following the presentation, the full text of the message will be inserted into this section for the final adopted budget document. An electronic version will also be made available on the District website.



2026-27 PROPOSED BUDGET

BREAKDOWN BY MAJOR FUND



SPECIAL REVENUE FUNDS

Sources:

- Title
- Nutrition Fund
- Individuals with Disabilities Education Act funds (IDEA)
- Integrated Grant
- Local Sources, Etc.

Uses:

Specific purpose expenses such as drug and alcohol prevention; special school projects; or support for disabled students, homeless students, or migrant students.

GENERAL FUNDS

Sources:

- State School Fund
- Local Property Tax
- Local Option Levy
- Arts Tax, Etc.

Uses:

Operations of schools, including expenditures for salaries and benefits, supplies, textbooks, utilities, and other general expenses.

BUDGET DOCUMENT FORMAT

Welcome to Portland Public School District (PPS or the District). If you are a new reader of our budget document or just need a review, the following section will guide you through the budget document's format and organization as well as the budget preparation process.

Budget Format

The Table of Contents leads the budget document and each of the four main sections has a separate and more detailed Table of Contents. The following is a brief overview of what to expect from each of the four sections:

- **Executive Summary** – This section includes the Budget Message and comprehensive narrative overview of the 2026-27 budget. The narrative presents the budget in the context of the District's vision and emerging strategic plan. In addition, summary budget information, student enrollment history and projections, and budget forecasts are presented in tabular and graphic format. The School Board, acting as the Budget Committee, is responsible for oversight, budget approval and adoption, appropriations, and imposing taxes for the District. The Budget Overview highlights major budget changes from 2025-26 with an emphasis on the General Fund, Special Revenue Fund, and Capital Projects Fund.
- **Organizational Section** – This section contains general information about the District and its budget, including the level of education provided, geographic area served, and the number of schools and students. Also included in this section are significant budget changes, financial policies, procedures and regulations, and a detailed description of the budget process.
- **Financial Section** – This section contains required information for the District's funds and descriptions of significant revenue sources and expenditure categories.
- **Informational Section** – This section includes detailed historical and projected personnel resource allocations, property tax information and other performance measures used by the District.



Ida B. Wells High School - PIL Football Ida B. Wells vs McDaniel, September 19, 2025



Franklin High School - First Day of School, August 27, 2025

Portland Public Schools
Calendar to Adopt the 2026-27 Budget

Draft Reviewed on October 28, 2025
Adopted on November 4, 2025
Amended on April 14, 2026

			Board Inform / Review	Board Action	
BUDGET PLANNING	**October 28, 2025**	***School Board Meeting*** Board reviews draft 2026-27 Budget Calendar	✔		PEC
	October - December 2025	***Community Engagement***			TBD
	November 4, 2025	***School Board Meeting*** Board adopts 2026-27 Budget Calendar		✔	PEC
	November 18, 2025	***School Board Meeting*** Board appoints Community Budget Review Committee (CBRC) members		✔	PEC
	December 16, 2025	***School Board Budget Work Session*** Establish priorities, budget principles, and policies	✔		PEC
	January - March 2026	***School Board Budget Work Sessions*** Inclusive of budget trainings, CBRC work session, and school staffing	✔		PEC
BUDGET BUILDING	**April 2026**	***Publish 1st Notice of Budget Committee Meeting*** *(5 to 30 days before the meeting)*			The Oregonian Web Site
	April 2026	***Publish 2nd Notice of Budget Committee Meeting*** *(5 to 30 days before the meeting)*			The Oregonian Web Site
	April 28, 2026	***Budget Committee Meeting (School Board Work Session)*** *CBRC in attendance* **Proposed Budget:** Superintendent delivers 2026-27 Proposed Budget message and presentation	✔		PEC
	May 12, 2026	***School Board Meeting*** CBRC presents 2026-27 Proposed Budget Report to the Board Board discussion and feedback focused on the budget	✔		PEC
	May 13, 2026 (updated)	***Budget Committee Meeting and Budget Work Session*** Board conducts a public hearing and work session on the Proposed Budget	✔		Benson High School (updated)
	May 26, 2026	***Budget Committee Meeting*** **Approved Budget**: Board as Budget Committee approves 2026-27 Proposed Budget		✔	PEC
	June 2026	***Publish Notice of Budget Hearing and Budget Summary*** *(5 to 30 days before the meeting)*			The Oregonian Web Site
	June 23, 2026	***TSCC Hearing*** TSCC certifies 2026-27 Approved Budget ***Budget Committee Meeting (School Board Meeting)*** **Adopted Budget:** Board conducts a public hearing, adopts budget, makes appropriations, and imposes taxes	✔	✔	PEC
	July 15, 2026	***Submit Tax Certification documentations*** *File budget information with County Recorder and Designated Agencies*			

DISTRICT GOALS AND OBJECTIVES

Overview

Portland Public Schools, founded in 1851, is a pre-kindergarten through twelfth grade urban school district in Portland, Oregon. Serving approximately 43,000 students in 81 schools and numerous programs, PPS is one of the largest school districts in the Pacific Northwest.

Visioning

In 2018-19, the District engaged in a process to define a new vision. The Board wanted to tap into the wisdom of our students, our educators, and our community to help re-imagine Portland Public Schools. The Vision for PPS focuses on what we want to be true for our graduates. The vision is a journey of ongoing creativity, learning, and improvement, and its boldness can speed progress by inspiring action and collaboration. This vision has been serving as our "North Star" guiding and aligning all of the District's plans and innovations toward the same clear and ambitious goals.

Core Values are an organization's enduring beliefs that remain constant over time. By making these values explicit through value statements and tethering them to a vision, an organization can articulate the ethical principles that guide action toward its vision:

Students at the Center

Honesty and Integrity

Respect

Creativity and Innovation

Grounded in the Spirit of Portland

Racial Equity and Social Justice

Excellence

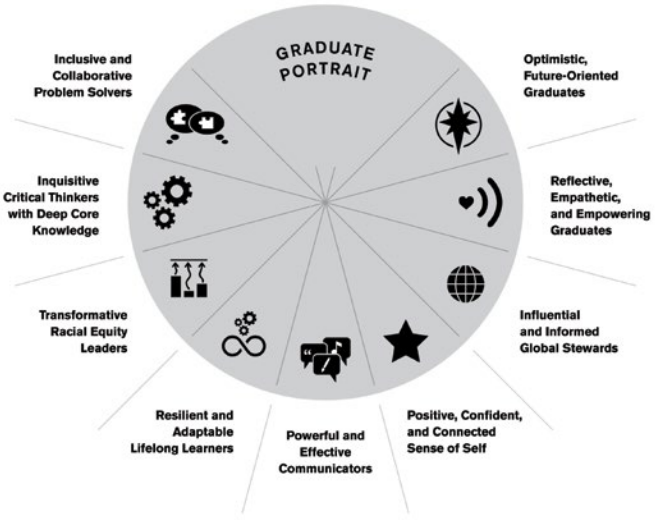
Relationships

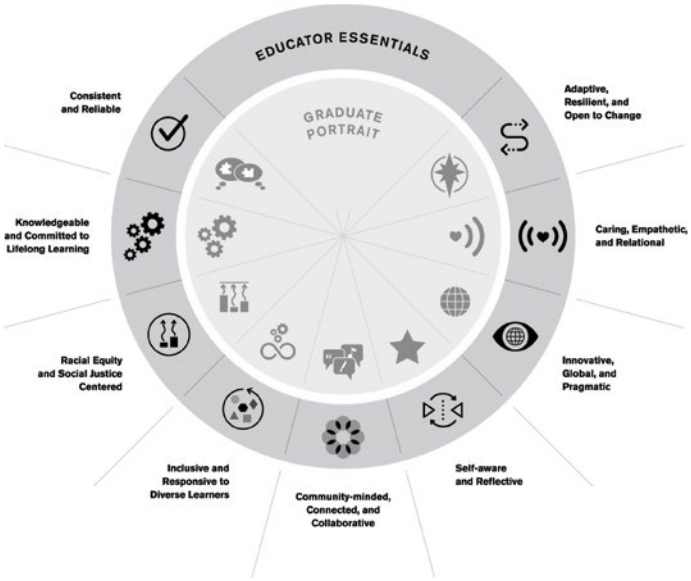
Partnerships and Collaboration

Joyful Learning and Leadership

The Graduate Portrait is a clear and ambitious description of what the community wants its students to know, be and be able to do, in order to prepare them to thrive in their lives and careers. Our graduate portrait includes attributes needed to prepare students to understand, confront, and change a global social environment that includes racial injustice and systems that perpetuate oppression.

PPS is committed to advancing the Graduate Portrait elements for every student. The PPS community wants to be very intentional and proactive about increasing options for each and every student. The most significant implication of this commitment is the need to integrate design thinking and that considers the full range of human diversity with respect to ability, language, culture, gender, age and other differences.

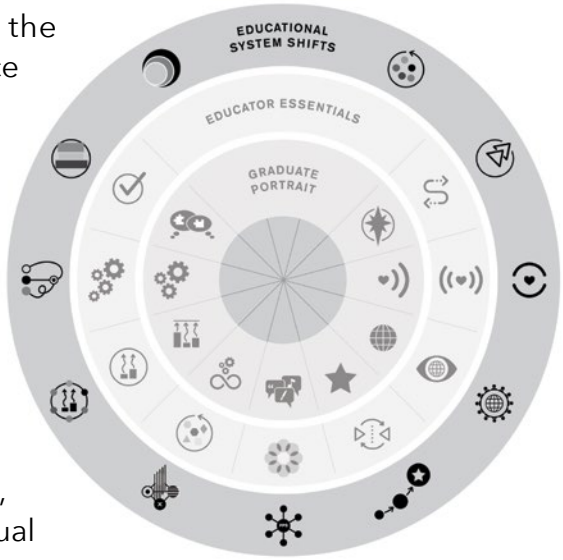




The Educator Essentials are distilled from community-wide input regarding the knowledge, skills, mindsets and dispositions needed from adults to support the Graduate Portrait. The Educator Essentials include content and practice knowledge, along with the human-connectedness aspects of collaborating, supporting and teaching and learning. Beyond excelling in their own practice, PPS educators recognize the collective effort required for the success of every student and take responsibility for their roles in bringing about the Educational System Shifts.

The Educator Essentials apply to every adult working at PPS. They underscore how every adult's contribution impacts students-directly or indirectly-and, therefore, impacts students' success. In order to develop a community of adults with these shared attributes, the school district is committed to helping every PPS adult understand their role in student learning, so that each person can translate the Educator Essentials to their own work and behaviors.

The Educational System Shifts are changes in the organization's priorities and how it operates. They apply across the organization, from individual schools to the central-office department. They create conditions that support and encourage adults to model the **Educator Essentials** and the students to achieve the **Graduate Portrait**.



Systems are difficult to change. They are complex, with many interconnecting parts, and beliefs tend to become entrenched as structures and processes evolve. Those who benefit from a given system usually have power within it and actively thwart changes. Therefore, creating shifts require persistence, widespread buy-in, continuous improvement processes, and a demonstrated commitment to serve every individual student in the school system.

Theory of Action

The District has developed a theory of action:

If we braid Racial Equity and Social Justice strategies into our instructional core work with our students, teachers, and content, and build our organizational culture and capacity to create a strong foundation to support every student, then we will re-imagine Portland Public Schools to ensure every student, especially our Black and Native American students who experience the greatest barriers, to realize the Vision of the Graduate Portrait.

Board Goals

The PPS School Board adopted goals in the following areas for 2022-2027:

- Third Grade Reading
- Fifth Grade Mathematics
- Eighth Grade Readiness
- High School Graduation

These Board goals seek to close opportunity and outcome gaps. The Board has identified benchmarks along the Pre-K to 12 academic continuum. These benchmarks allow the District to gauge student progress towards realizing the Graduate Portrait.

District Continuous Improvement Plan

While the vision identifies the what and the why, the strategy that follows from the vision defines the how. **Four goals** have been prioritized into a multi-year continuous improvement plan that will lead to the District Goals and Strategies. The goal areas are: attendance, literacy, mathematics, and 9th grade success.

Finance Mission

Support equitable outcomes for students through transparent stewardship of resources and effective financial processes and services, emphasizing collaboration, responsive customer service and continuous improvement.

Budget Goal

In 2019, the PPS Board of Education revised the District's policy on Reserve Funds (Board Policy 8.10.025) to establish a reserve in the General Fund ranging from 5% to 10% of annual General Fund revenues. The goal for the reserve will be set as part of the District's long-range financial plan, with an expectation that the District will achieve and sustain a 10% reserve.

Overview of Goals

TOGETHER, WE RISE

District Continuous Improvement Plan 2025-2028

GOALS

By June 2028, and in addition to the targeted focus on Literacy and Math Continuous Improvement at the site level in 2025–26, all students in all PK-12+ classrooms will: Know and understand the learning target and success criteria, successfully engage in grade-level and standards-aligned tasks from district-approved, high-quality instructional materials and structures, self-assess their learning and explain and justify their thinking connected to the learning target and success criteria. This will have a particular focus on our district's focal students.

ATTENDANCE

By June 2028, the overall percentage of students with good or acceptable attendance rates will increase by 15%, from 67% to 82%. In order to reduce the disproportionate gap, the percentage of students with good or acceptable attendance for all focal groups (Black & Native students, multilingual learners, students receiving special education services, and students experiencing poverty) will increase by 24%.

9TH GRADE SUCCESS

We will accelerate achievement and eliminate early high school opportunity gaps by ensuring all students finish 9th grade On Track. Our goal is to increase the percentage of all students finishing 9th grade On Track from 75% (June 2024) to 95% by June 2028, while closing the opportunity and outcome gap for focal students by increasing their On-Track rate from 53% to 95% over the same time period.

LITERACY

By June 2028, all students in 100% of PK-12+ Language Arts classrooms - with a particular focus on our district's most impacted focal students based upon our data (Native students, Black students, multilingual learners, students receiving special education services, and students experiencing poverty) - will (1) know and understand the learning target and success criteria and (2) successfully engage in grade-level and standards-aligned tasks from district-approved high-quality instructional materials and structures.

MATHEMATICS

By June 2028, all students in 100% of PK-12+ Mathematics classrooms -with a particular focus on district focal students (Native students, Black students, multilingual learners, students receiving special education services, and students experiencing poverty) - will (1) know and understand the learning target and success criteria and (2) successfully engage in grade-level and standards-aligned tasks from district approved high-quality instructional materials and structures.

Overview of Strategies



ATTENDANCE

Tier 1 Integrated Climate & Culture Practices

Data-based Attendance Review and Response

School & Community-wide Attendance Initiative

9TH GRADE SUCCESS

Data Access & Literacy

Team Structures & Processes

Intervention Strategies

Transition Support

Instructional Practices

LITERACY

High-Quality, Inclusive Core Instruction

Assessment, Data, & Intervention: Formative Analysis and Differentiated Support

Family and Community Engagement

MATHEMATICS

High-Quality, Inclusive Core Instruction

Assessment, Data, & Intervention: Formative Analysis and Differentiated Support

Family and Community Engagement

BUDGET OVERVIEW

Background

Portland Public Schools (PPS) is the largest school district in the state of Oregon, serving approximately 43,000 students from pre-kindergarten through twelfth grade across 81 schools and various specialized programs, including Odyssey and ACCESS Academy, charter schools, and Community-Based Organizations. The District serves a diverse population of students and families from economically, ethnically, and racially varied backgrounds. Educational services include general and special education, career and technical education (CTE), and a variety of alternative programs.

Governance, Leadership, and Oversight

PPS is governed by a seven-member Board of Education, with members elected to four-year terms. Board members are responsible for:

- Setting the district's long-term direction,
- Calling for elections on bond and local option levy proposals, and
- Approving the annual budget.

The Superintendent reports directly to the Board of Education and oversees district operations.

PPS engages with the Community Budget Review Committee (CBRC) throughout the budget development cycle. This group of volunteer members reviews, evaluates, and makes recommendations to the PPS Board of Education regarding the Superintendent's Proposed Budget. The CBRC also reviews the allocation and expenditure of Local Option Levy funds.

Additionally, PPS's Approved Budget and property tax measures are reviewed and certified by the Tax Supervising and Conservation Commission (TSCC). This advisory body oversees budgets, taxes, debt, and management practices of Multnomah County taxing districts.

Financial Resources and Budget

The PPS budget is organized into distinct funds to ensure transparency and to meet legal requirements for how public resources are used. This structure allows the district to balance the immediate needs of the classroom with long-term investments in school facilities.

- General Fund (100) is the primary operating fund for the district, supporting the core of the educational experience. It is the most flexible resource, funding staff, instructional programs, and services that directly impact students. Its health is closely tied to state funding levels and local property tax revenues.
- Special Revenue Funds (200) are dedicated to specific purposes, often provided through federal, state, and private grants. Examples include targeted student supports, nutrition services, and specialized career and technical programs. These funds ensure that resources are directed exactly where they are intended.
- Debt Service Funds (300) are dedicated to manage the repayment of long-term obligations, such as bonds and other borrowings.
- Capital Projects Funds (400) encompasses several distinct funds dedicated to the district's physical environment. While voter-approved bonds are the most prominent, this also includes other capital resources used for property acquisition, seismic safety upgrades, and technology infrastructure.

- Internal Service Funds (600) are used to support services provided by one department to other areas of the district. This includes managing essential protections such as workers' compensation, self-insurance, and unemployment. Centralizing these services provides a more stable and predictable way to manage risk across the entire organization.

Revenue Sources

General Fund revenue comes from both local and state sources, including:

- Permanent rate property taxes
- State School Fund (SSF) grant
- Local Option Levy and Gap Tax (excluded from the SSF formula)
- Arts Tax

The District's permanent tax rate is $5.2781 per $1,000 of assessed value, which includes:

- $4.7743 (original permanent rate)
- $0.5038 (gap portion, re-authorized by the Oregon Legislature in 2009, which is the difference between the 1990 Measure 5 limit and the 1997 Measure 50 limit on local property taxes)

Local Option Levy

The Local Option Levy, first passed in 2001, funds teaching positions and classroom support. Voters have renewed it multiple times, most recently in May 2024, at a rate of $1.99 per $1,000 of assessed value.

Capital Improvements and School Modernization

Voter-approved bond measures are the primary funding source for major capital improvement projects, including school modernization.

In November 2020, voters approved a $1.2 billion bond measure to support:

- Health and safety upgrades, such as seismic retrofits, new roofs, Americans with Disabilities Act (ADA) and security enhancements.
- Modernization of Jefferson High School and Benson Polytechnic High School.
- Investments in curriculum and technology.

In May 2025, voters approved a $1.83 billion bond measure to support:

- Capital improvements at schools
- Capital improvements in safety and security
- Modernization of high schools Jefferson, Ida B. Wells, and Cleveland
- Modernization and improvements in technology and educational materials
- Capital improvements to athletics and performing arts facilities

Reserve Fund Policy

In 2019, the PPS Board of Education revised its Reserve Funds Policy (Board Policy 8.10.025), establishing a General Fund reserve target of 5% to 10% of annual revenues, with a long-term goal of sustaining a 10% reserve as part of the District's financial strategy.

Budget Preparation

The District develops an annual budget using available resources to address PPS strategic and Board goals, core values, organizational priorities, and obligations. As part of the budget development process for 2026-27, the District incorporated targeted community input, integrating the four goal areas from the District Continuous Improvement Plan (DCIP) and best practices to lay the foundation for improved student outcomes.

A notable change to the budget development process for the 2026-27 fiscal year was the introduction of a cross-functional Academic Design workgroup. During the development of the 2026-27 budget, principals were engaged early in the process to inform school staffing and central office budgets. A cross-functional Academic Design workgroup, which included principals and other district leaders, provided key insights and recommendations that informed decisions on maintaining critical investments. PPS communities, including students and their families, staff, volunteers, and many others, have guided the District's vision, Graduate Portrait, and strategic plan and have informed key investments such as curricula and instructional framework adoption. The Superintendent also engaged communities early and often to help identify gaps in programming and helped the District advance toward achieving greater racial equity and social justice in our schools and programs.

Budgeting Highlights

The Board Goals

The PPS School Board adopted goals in the following areas in June 2022 for 2022-2027:

- Third Grade Reading
- Fifth Grade Mathematics
- Eighth Grade Readiness
- High School Graduation

These Board goals seek to close the opportunity and outcome gaps between students of color and their white peers. The Board has identified a set of benchmarks along the pre-kindergarten through twelfth-grade academic continuum. These benchmarks allow the District to gauge student progress toward realizing the Graduate Portrait.

District Continuous Improvement Plan (DCIP)

The District focus is described in the District Continuous Improvement Plan. It describes a set of strategies aligned to the District's vision and board goals. The DCIP is organized into four goal areas:

- Attendance
- Literacy
- Math
- 9th Grade Success

Closing the Budget Gap

While the District's total combined budget has grown to $2.77 billion, this increase is driven primarily by legally restricted capital bond funds ($1.38 billion) that cannot be used for daily school operations. In contrast, our core operating budget, the General Fund, which supports school staffing and student programs, is decreasing by $6.5 million.

District revenues are not keeping pace with the costs of operating the school system. Operating revenues are increasing slightly, while expenditures are increasing at a faster rate, causing an ongoing structural gap. The District is proposing to close the gap between revenue and expenditures by reducing 2026-27 expenditures by a minimum of $50.0 million. The District has prioritized student outcomes and the student experience in budgeting and seeks to minimize impacts in our classrooms.

The Impact of Declining Enrollment

A primary driver of the District's structural deficit is sustained enrollment decline. Since 2020, PPS enrollment has fallen and is projected to continue decreasing.

Oregon's State School Fund allocates revenue based on Weighted Average Daily Membership (ADMw), which adjusts funding for specific student demographics. To mitigate sudden funding cliffs, the state utilizes Extended ADMw, funding districts based on the higher of their current or prior year's enrollment. However, a continuous, multi-year enrollment decline ultimately outpaces this statutory buffer.

For the 2026-27 fiscal year, both our actual and state-funded student counts are projected to drop:

- Actual Daily Enrollment (ADMr): Decreasing from 42,467 to 41,661.
- Weighted Enrollment (Extended ADMw): Decreasing from 52,392 to 51,390.

While enrollment is decreasing, the fixed costs of operating 81 schools and the rising costs of personnel, benefits, and utilities continue to grow, creating a structural deficit that requires decisive budget adjustments.

Details of the Expenditure Reductions

To provide a transparent view of the district's shifting landscape, the following staffing changes are reported across All Funds (General, Special Revenue, Capital and Internal Service Funds). This "All Funds" view reflects the net impact on our workforce, accounting for both eliminated positions and the strategic movement of eligible expenses to alternative funding streams. These figures compare the FY 2026-27 budget to the FY 2025-26 budget.

- Building Supports and Central Office: 142 FTE reduced through targeted reductions and efficiencies across district operations while prioritizing core student-facing services. Building Supports focuses resources on essential operations, safety, and compliance through reduced non-critical spending and transportation consolidation. Central Office streamlines administrative staffing and non-essential services to preserve capacity for core district support.
- Schools & Specialized Programs: 180 FTE reduced by enrollment-driven staffing adjustments, blended classrooms, and Multilingual Learners (MLL) ratio changes, with core instruction and student supports maintained. While lower enrollment necessitates some blended classrooms and adjusted ratios, the District is committed to providing targeted professional development for educators leading blended cohorts and ensuring our Multilingual Learners continue to receive the dedicated instructional hours required for their success. Specialized Programs realigns staffing and purchased services to high-impact programs.

Oregon Integrated Grant Programs

The Oregon Department of Education (ODE) combines nine education programs into one process for planning, applying, and reporting. This approach, called Aligning for Student Success: Integrated Guidance, helps school districts reduce duplication and better coordinate their improvement efforts.

Six of these programs provide direct funding:

- High School Success
- Student Investment Account
- Early Indicator and Intervention Systems
- Early Literacy Success School District Grants
- Career and Technical Education (Perkins)
- Federal School Improvement (FSI) for Comprehensive and Targeted Supports

Three additional programs are included as part of the process but do not have separate funding:

- Continuous Improvement Planning
- Career Connected Learning
- Every Day Matters

Instead of being funded separately, these programs are built into how the District plans and carries out its work.

These programs support shared goals and align with the District's strategic priorities. PPS develops one integrated plan to guide how the funding is used, ensuring it meets state requirements while supporting student success, equity, and access to programs and services.

PPS expects to receive approximately $62.0 million in Integrated Grant funding for the 2026–27 school year, including $1.5 million allocated to charter schools and community-based organizations. These funds are used to support District and Board priorities, including career and technical education, student success supports, and efforts to reduce opportunity gaps.

General Obligation Bonds

The District sold $365.5 million in General Obligation Bonds, Series 2020B, in the winter of 2020 to support the first phase of the facilities modernization, security improvements, Americans with Disabilities Act (ADA) upgrades, technology, and curriculum work outlined in the 2020 bond authorization.

The District issued $420.0 million in General Obligation Bonds on the 2020 Authorization in spring 2023 and issued another $79.5 million in May 2025 to continue progress on projects under the ballot title. The District issued $90.0 million in bonds in February 2026 to support capital projects.

Voters approved the District's request to renew its capital investment levy on the May 20, 2025 ballot. This $1.83 billion, eight-year bond renewal maintains the existing target rate of $2.50 per $1,000 of assessed value. The District issued $570.0 million in bonds in February 2026 to support capital projects.

These investments are reflected in this document's 300 Debt Service Fund and 400 Capital Project Fund sections.

School Staffing

The PPS staffing model uses enrollment projections to determine the school staffing allocation. The 2026-27 budget aligns school-level staffing with our current and projected student enrollment. This model ensures:

- **Equitable resources for all schools.** Each school, especially small schools and those with underserved student populations, has an adequate number of school-based staff and resources. Schools with federal Every Student Succeeds Act (ESSA) and Title I-A designations receive support based on their status.

- **Targeted Equity Funding.** To align with the District equity lens, resources are allocated to schools through equity funding.
    - In K-8 schools: Equity allocations are based on a combination of socio-economic status (determined by eligibility for free meals through direct certification) and Federally Qualified Underserved (determined by direct certification, special education eligibility, and limited English proficiency).
    - In high schools: Equity allocations are based on socio-economic status (students directly certified for free meals), ensuring all high schools receive flexible staffing (discretionary FTE) to support their students.
- **Core academics are fully supported**. Staffing meets all course requirements for kindergarten through twelfth-grade graduation.
- **Labor agreements are honored.** All labor partner contract requirements are met.
- **State standards are met.** The District meets, or is progressing towards meeting, state requirements including physical education and health requirements.
- **Special revenue funds are maximized.** Special funds and grants are strategically leveraged and aligned with their designated purposes to maximize student impact.
- **Spending is transparently tracked**. All direct and indirect costs are accounted for by subject, grade level, and school.
- **Budgets comply with the law.** The budget is in compliance with Oregon Local Budget Law (ORS 294).

The District holds a small amount of FTE in reserve. While limited, if fall enrollment at a specific school exceeds our projections and causes class sizes to spike beyond an acceptable range, these reserve positions allow us to deploy additional staffing relief where it is needed most.

Workforce Compensation

Workforce compensation represents the largest component of the District's operating costs and supports staffing across instructional, administrative, and operational functions. Workforce compensation costs include salaries, health benefits, retirement contributions, and other employer-paid costs associated with employees.

Through collective bargaining in 2023–24 and 2024–25, the District reached agreements with its labor partners that resulted in increases to salaries and benefits across employee groups. These agreements are reflected in the District's current cost structure. In 2025–26, the District is engaged in collective bargaining with all labor units.

Staffing and Full-Time Equivalent (FTE) Overview

Because workforce compensation represents the largest component of our operating costs, the District's staffing levels are closely aligned with available resources and enrollment trends. For the 2026-27 Proposed Budget, the District supports a total of 5,513 Full-Time Equivalent (FTE) positions. This represents a decrease of 322 FTE positions compared to the 2025-26 budget. This adjustment reflects our fiscal reality and the impact will be felt across our entire system, including our schools. These are challenging choices made with one goal in mind: ensuring the long-term stability of our District so we can remain focused on our core commitment to student success.

The Meritorious Budget Award
PPS received the Meritorious Budget Award from the Association of School Business Officials International for the 2025-26 budget for providing a user-friendly document with an abundance of information in graphic and narrative form to meet the needs of varied readers, including the average taxpayer. The 2026-27 Proposed Budget was developed using the same rigorous standards.

Budget Overview

PPS is proposing a budget of $2.77 billion for 2026-27 and is using all available resources to meet the board goals and priorities set forth by PPS leadership.

The 2026-27 budget is focused on three areas:

- Preserving critical support for teaching and learning:
  - Early literacy investments
  - Math acceleration strategies
  - Instructional Coaches
  - Culturally responsive curriculum
  - Targeted interventions to boost attendance and engagement
- Sustaining programs that reflect our PPS values:
  - Robust arts, music, and athletics offerings
  - Growing Career and Technical Education pathways
  - Commitment to social-emotional wellness
- Making necessary reductions:
  - Aligning staffing and programs to available resources across schools and central services
  - Prioritizing direct student support while reducing central office functions
  - Implementing school-based reductions where necessary due to the size of the budget gap
  - Focusing on long-term financial stability while minimizing disruption to students

Budget Assumptions

Revenues & Fund Balance
2026-27 will be the second year of the Oregon Legislature's biennial budget cycle for 2025-27. PPS has based the budget on state funding of a $11.36 billion State School Fund (SSF) and a $1.10 billion Student Investment Account (SIA). The District's estimate of available resources in 2026-27 is based on the following assumptions:

- The District Extended Average Daily Membership Weighted (ADMw) is projected to be 51,390.
- The estimated SSF distribution is based upon a $11.36 billion SSF to be distributed at a 49/51% split over two years, with PPS' share of the second year being $305.4 million.
- The overall current year property tax revenue for 2026-27 is estimated to be $533.6 million, a 0.4% increase. Local option revenue is estimated to be $103.9 million, a 4.8% decrease. The District assumes a 1.8% increase in assessed value and a 95.0% collection rate based on historical receipts.

- The Multnomah Education Service District (MESD) pass-through or "Transit" dollars anticipated for 2026-27 is $3.8 million. It is based upon changes to the service plan selection and will be refined not only through the budget process but also throughout the year, depending on student needs and available funding.
- In February 2026, the District sold $660.0 million in voter approved bonds to continue improving and rebuilding school facilities. This is expected to increase the property tax rate by $0.03. Even with this increase, the District remains within its commitment to voters to keep the total bond tax rate at or below $2.50 per $1,000 of assessed value. This resource is reflected in the 2026-27 budget.
- The District's General Fund beginning fund balance, considered a resource in the budget process, is estimated to be $41.0 million on July 1, 2026.

Revenue Factors

Portland Public Schools	2022-23	2023-24	2024-25	2025-26	2026-27
Real Market Value (in Billions)[1]	$157.08	$156.67	$151.42	$150.64	$149.50[3]
Total Net Assessed Value (in Billions)	$62.49	$69.00	$71.05	$72.25	$73.56[2]
Property Tax Rate Extended (per $1,000 Assessed Value):					
Operations	$5.28	$5.28	$5.28	$5.28	$5.28
Local Option for Operations	$1.99	$1.99	$1.99	$1.99	$1.99
Debt Service GO Bonds	$2.30	$2.38	$2.34	$2.47	$2.50
Total Property Tax Rate	$9.57	$9.65	$9.60	$9.74	$9.77
Less Measure 5 Adjustments	$25,191,648	$35,716,191	$42,563,967	$47,090,332[2]	$53,414,000[2]
Average Daily Enrollment - ADMr	44,518	43,882	43,201[2]	42,467[2]	41,661[3]
Weighted Enrollment - ADMw	53,581	52,999	52,392[2]	51,390[2]	50,396[3]
Weighted Enrollment - ADMw Extended	53,500	53,581	52,999[2]	52,392[2]	51,390[3]

1. Value used to calculate Measure 5 limits. Includes urban renewal excess value.
2. Latest estimates from ODE and Tax Supervising and Conservation Commission.
3. Projected

Expenses

The District's 2026-27 plans are based on a number of projected expenditures, with capital outlay and labor costs being the largest expenses.

The District is currently engaged in collective bargaining with all labor units. The outcomes of these negotiations represent a significant area of uncertainty in projected expenditures. While the 2026–27 Proposed Budget reflects current known costs and planning assumptions, final negotiated agreements may result in additional ongoing financial obligations. Any increases beyond current assumptions would require either the identification of additional resources or corresponding expenditure reductions to maintain a balanced budget and required reserve levels.

- In addition to compensation, the District continues to experience rising costs in pension obligations, healthcare, and other employee benefits. The Public Employees Retirement System (PERS) rates for the 2025–27 biennium and other statutory benefit costs contribute to increased expenditure requirements across all funds.

The proposed expenditures for 2026-27 are based on the following assumptions:

- Compensation adjustment to include a 1% Cost of Living Adjustment (COLA) for all labor groups and step progression for eligible employees.
- The Public Employees Retirement System (PERS) Board released the contribution rates for the 2025-27 biennium beginning July 1, 2025:
    - Portland Public Schools is anticipating a blended 4.18% PERS contribution rate.
    - The PERS Unfunded Actuarial Liability (UAL) requires a fringe rate of 18.79% to be applied to all payroll.
- Other employer labor costs are based on the group health insurance negotiated amount and the following:
    - 7.65% FICA
    - 0.39% Workers' Compensation
    - 0.39% Unemployment Compensation (self-funded)
    - 0.59% Paid Family Medical Leave (PFML)
    - 0.18% Other Employer Paid Benefits (Life, Long Term Disability, and Accidental Death & Dismemberment Insurance)
    - 0.47% Retiree Health Insurance
    - 0.15% Early Retirement
- The District's staffing is composed of five primary employee groups. Each group has a designated "work year" based on collective bargaining agreements or employment contracts. These contractual days represent the baseline for calculating Full-Time Equivalent (FTE) and total compensation costs.

Employee Group	Included Roles	Work Year (Days)
Licensed Staff	Educators, TOSAs (Teachers on Special Assignment), Itinerant Staff	192 – 202
Classified Staff	PFSP (Administrative Support), Custodians, Laborers	182 – 260
Licensed Administrators	Principals, Assistant Principals, Program Administrators	233 – 260
Non-Represented Staff	Associates, Analysts, Program Managers	192 – 260
Senior Leadership	Directors, Senior Directors, Cabinet Members	260

The contingency amounts identified in the budget serve as a primary risk-mitigation tool. These funds are intended to provide the Board with the fiscal flexibility to address variables such as staffing requirements driven by enrollment fluctuations and critical unforeseen expenses, as deemed necessary in the context of overall fiscal stability.

BONDED AND OTHER DEBT
(in thousands)

Issue Date	Series	Original Issue	Outstanding @ June 30, 2026	2026-27 Principal Payments	2026-27 Interest Payments	2026-27 Total Payments
General Obligation Bonds						
April 30, 2015	GO Series 2015B	244,700	81,035	9,165	3,027	**12,192**
August 10, 2017	GO Series 2017B	241,890	163,095	3,780	5,363	**9,143**
April 14, 2020	GO Series 2020	441,320	196,620	29,010	8,392	**37,402**
December 30, 2020	GO Series 2020B	365,465	267,255	-	6,918	**6,918**
December 30, 2020	GO Series 2020C	53,965	38,715	4,780	560	**5,340**
April 27, 2023	GO Series 2023	420,000	286,000	13,955	13,249	**27,204**
February 24, 2026	GO Series 2026	660,000	660,000	40,695	42,299	**82,994**
Limited Tax Pension Obligation Bonds						
October 31, 2002	2002B	156,580	40,900	27,910	2,270	**30,180**
April 21, 2003	2003B	156,370	59,940	39,670	3,405	**43,075**
July 15, 2021	2021	399,390	332,735	16,360	7,143	**23,503**
Full Faith & Credit Obligations						
August 4, 2016	2016 Qualified Zone	4,000	2,200	200	-	**200**
November 9, 2016	2016 FF&C Taxable	5,048	2,293	355	63	**418**
	Total	**3,148,728**	**2,130,788**	**185,880**	**92,689**	**278,569**

LONG TERM DEBT
(in thousands)

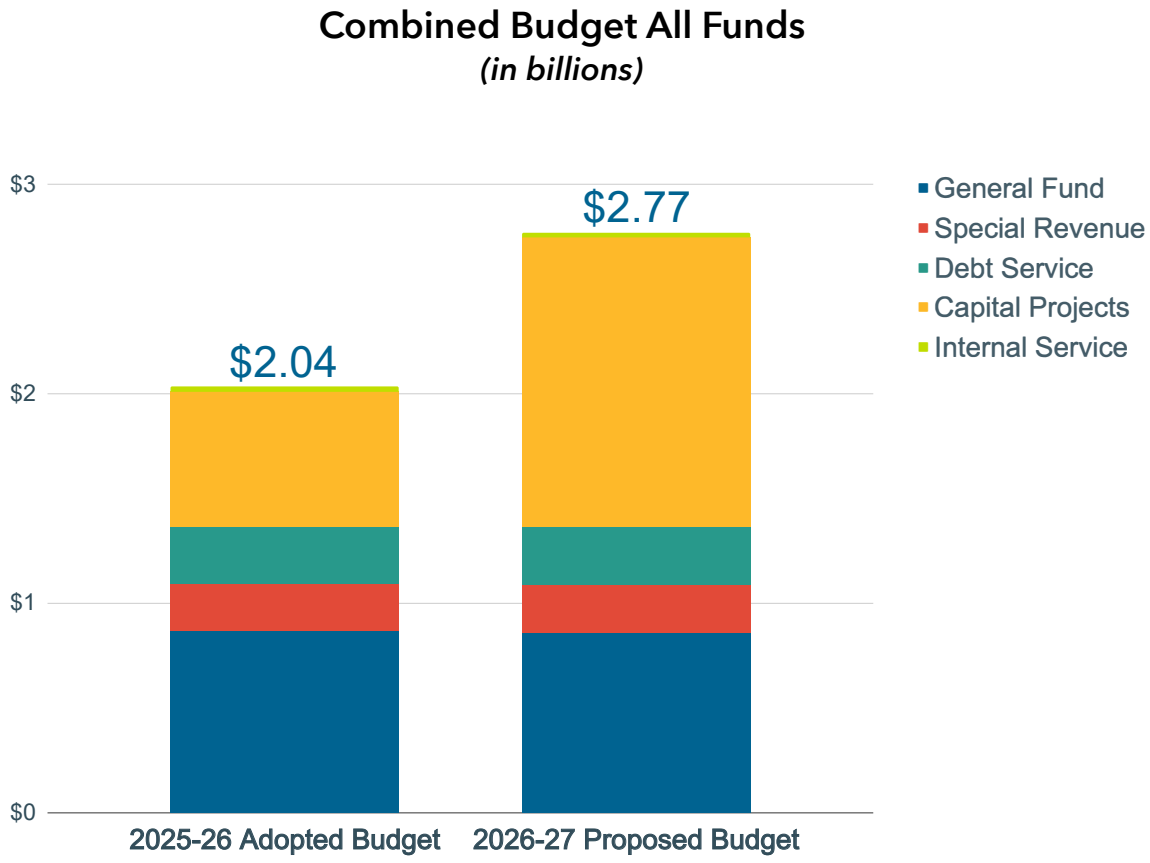
Fiscal Year	LTD Tax Pension & Refunding	2016 Qualified Zone Bonds	FF&C Taxable Debt 2016	2015 GO Bonds	2017 GO Bonds	2020 GO Bonds	2020B GO Bonds	2020C GO Bonds	GO Series 2023	GO Series 2026	TOTAL
Principal:											
FYE 2027	83,940	200	355	9,165	3,780	29,010	-	4,780	13,955	40,695	**185,880**
FYE 2028	50,670	200	365	9,805	4,285	31,540	590	5,035	15,090	53,375	**170,955**
FYE 2029	18,495	200	375	10,675	4,780	34,190	850	5,300	16,665	-	**91,530**
FYE 2030	19,660	200	390	11,600	5,310	9,145	8,105	5,525	11,370	10,885	**82,190**
FYE 2031-2035	118,685	1,000	808	39,790	35,615	60,880	54,300	18,075	61,770	44,615	**435,538**
FYE 2036-2040	142,125	400	-	-	52,670	31,855	77,205	-	62,075	80,935	**447,265**
FYE 2041-2045	-	-	-	-	56,655	-	102,375	-	30,785	79,060	**268,875**
FYE 2046-2050	-	-	-	-	-	-	23,830	-	74,290	184,755	**282,875**
FYE 2051-2055	-	-	-	-	-	-	-	-	-	165,680	**165,680**
Principal Total	**433,575**	**2,200**	**2,293**	**81,035**	**163,095**	**196,620**	**267,255**	**38,715**	**286,000**	**660,000**	**2,130,788**
Interest:											
FYE 2027	12,818	-	63	3,027	5,363	8,392	6,918	560	13,249	42,299	**92,689**
FYE 2028	8,811	-	52	2,752	5,174	6,942	6,918	464	12,552	30,296	**73,961**
FYE 2029	6,686	-	41	2,262	5,045	5,365	6,888	364	11,797	27,627	**66,076**
FYE 2030	12,418	-	30	4,362	22,319	13,518	30,278	816	48,523	27,627	**159,891**
FYE 2031-2035	22,792	-	24	-	16,354	2,842	20,785	-	33,453	128,565	**224,815**
FYE 2036-2040	6,498	-	-	-	7,323	-	11,198	-	19,911	119,351	**164,281**
FYE 2041-2045	-	-	-	-	-	-	1,466	-	12,662	95,253	**109,382**
FYE 2046-2050	-	-	-	-	-	-	-	-	-	66,882	**66,882**
FYE 2051-2055	-	-	-	-	-	-	-	-	-	24,510	**24,510**
Interest Total	**70,023**	**-**	**211**	**12,402**	**61,578**	**37,059**	**84,451**	**2,204**	**152,148**	**562,409**	**982,486**
Total Debt Service	**503,598**	**2,200**	**2,504**	**93,437**	**224,673**	**233,679**	**351,706**	**40,919**	**438,148**	**1,222,409**	**3,113,274**

Payments by Debt Service Fund, 2026-27

Fiscal Year	LTD Tax Pension & Refunding	2016 Qualified Zone Bonds	FF&C Taxable Debt 2016	2015 GO Bonds	2017 GO Bonds	2020 GO Bonds	2020B GO Bonds	2020C GO Bonds	GO Series 2023	GO Series 2026	TOTAL
Fund 308	96,758	-	-	-	-	-	-	-	-	-	**96,758**
Fund 322	-	200	-	-	-	-	-	-	-	-	**200**
Fund 323	-	-	418	-	-	-	-	-	-	-	**418**
Fund 350	-	-	-	12,192	9,143	37,402	6,918	5,340	27,204	82,994	**181,193**
Total	**96,758**	**200**	**418**	**12,192**	**9,143**	**37,402**	**6,918**	**5,340**	**27,204**	**82,994**	**278,569**

2026-27 BUDGET

The budget presented in this document represents the financial plan for PPS. It is balanced and contains estimates of the revenues and expenditures needed to support the program offerings of the District for a single year. In total, it demonstrates the District's strategies and operational requirements for serving PPS students during the 2026-27 school year. The total combined budget, including all funds, increased by approximately $733.5 million, or 36.0%, from $2.04 billion in 2025-26 to $2.77 billion in 2026-27, which includes a General Fund contingency of $41.1 million. This increase in budget is primarily due to capital improvement bond sales in the amount of $660.0 million.



Total Resources

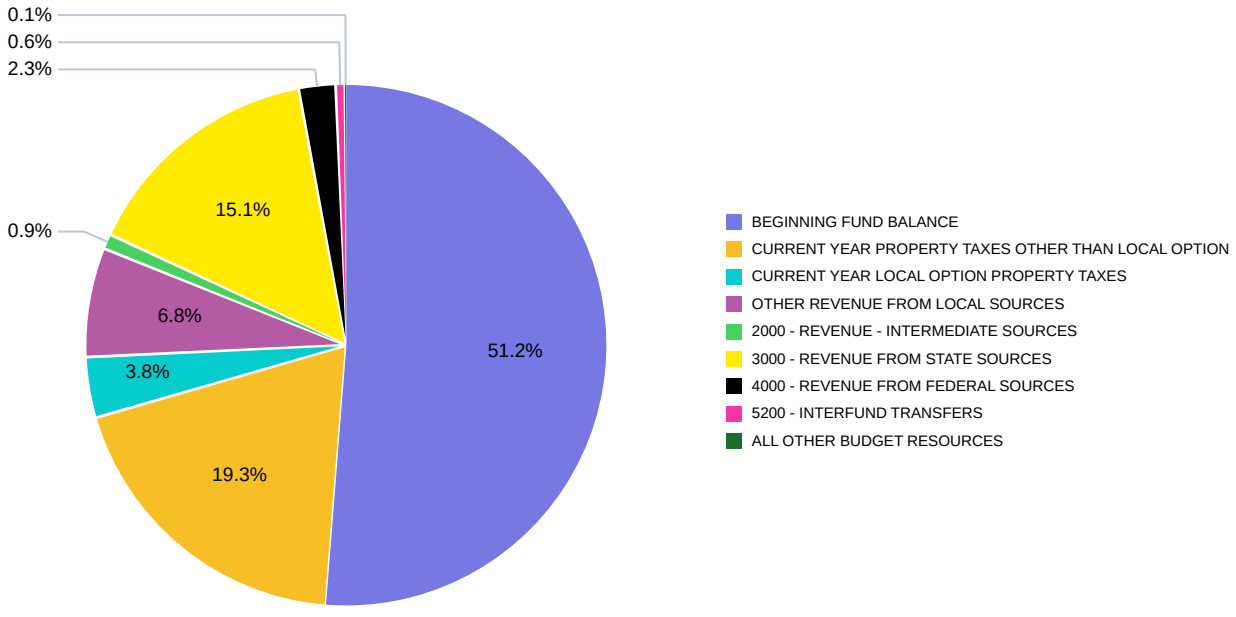
Total resources in the 2026-27 budget include federal, state, intermediate, and local sources, as well as long-term debt receipts, interfund transfers, and beginning fund balance. The proposed resources for all funds in 2026-27 is $2.77 billion and represents an increase of $733.5 million from the 2025-26 budget.

The Beginning Fund Balance, including Capital Projects Funds, represents the largest resource for the District at $1.42 billion, or 51.2% of the District's total resources. Of this amount, $41 million in the General Fund is unrestricted. Current Year Property Taxes contribute the second largest portion of resources for all funds, with $533.6 million or 19.3%. Revenue from State Sources (including the State School Fund) is the third largest source with $417.9 million or 15.1%. Other Revenue from Local Sources is the fourth largest revenue contributor with $187.3 million or 6.8%.

Summary of Resources by Major Object - All Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
BEGINNING FUND BALANCE	672,720	895,164	624,938	608,455	1,418,834	-	-
CURRENT YEAR PROPERTY TAXES OTHER THAN LOCAL OPTION	456,422	496,282	505,208	531,389	533,562	-	-
CURRENT YEAR LOCAL OPTION PROPERTY TAXES	109,213	106,896	104,123	109,222	103,938	-	-
OTHER REVENUE FROM LOCAL SOURCES	159,803	189,153	173,041	154,291	187,269	-	-
2000 - REVENUE - INTERMEDIATE SOURCES	9,400	7,554	13,391	10,314	25,686	-	-
3000 - REVENUE FROM STATE SOURCES	366,303	364,138	381,597	394,574	417,908	-	-
4000 - REVENUE FROM FEDERAL SOURCES	110,354	108,595	62,967	70,475	63,078	-	-
5200 - INTERFUND TRANSFERS	1,901	1,505	11,262	41,756	15,767	-	-
ALL OTHER BUDGET RESOURCES	465,856	10,415	98,307	114,641	2,550	-	-
Total Resources	**2,351,970**	**2,179,703**	**1,974,836**	**2,035,117**	**2,768,591**	**-**	**-**

Percent of Resources by Major Object - All Funds



Total Requirements

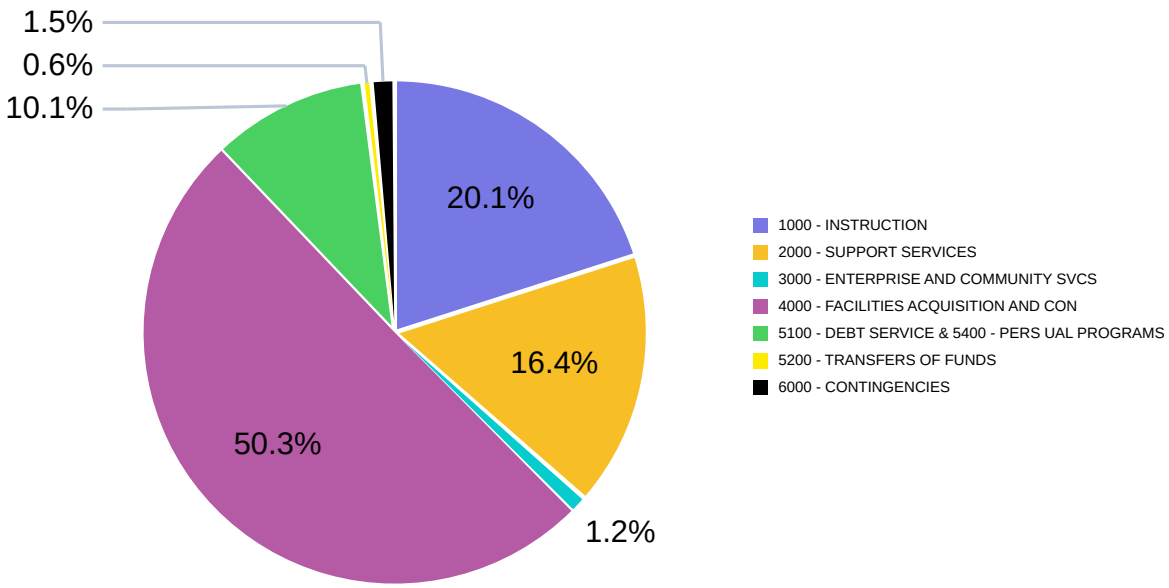
The 2026-27 budget requirements for all funds represent a $733.5 million increase compared to the 2025-26 adopted budget. Expenditures are categorized by major function and major object.

- **Major functions** include instruction, support services, enterprise and community services, facility acquisition and construction, debts, transfers out, contingency, and ending fund balance. Facilities Acquisition and Construction is the largest budget category at $1.39 billion or 50.3% of all funds. Instruction is the second largest budget category at $555.1 million or 20.1%. Support Services is the third largest budget category at $453.2 million or 16.4% of all funds.

Summary of Requirements by Major Function - All Funds (in thousands)

Major Function	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
1000 - INSTRUCTION	471,607	500,838	518,964	545,151	**3,260.78**	555,132	-	-	**3,172.11**
2000 - SUPPORT SERVICES	435,964	460,208	453,372	451,464	**2,294.91**	453,173	-	-	**2,089.90**
3000 - ENTERPRISE AND COMMUNITY SVCS	34,878	32,128	32,973	42,469	**233.53**	31,941	-	-	**222.16**
4000 - FACILITIES ACQUISITION AND CON	285,717	309,216	167,498	639,909	**46.25**	1,392,645	-	-	**29.00**
5100 - DEBT SERVICE & 5400 - PERS UAL PROGRAMS	226,739	250,869	259,099	272,690	-	278,876	-	-	-
5200 - TRANSFERS OF FUNDS	1,901	1,505	11,262	41,756	-	15,767	-	-	-
6000 - CONTINGENCIES	-	-	-	41,679	-	41,056	-	-	-
7000 - UNAPPROPRIATED FUND BALANCE	895,164	624,938	531,667	-	-	-	-	-	-
Total Requirements	**2,351,970**	**2,179,703**	**1,974,836**	**2,035,117**	**5,835.46**	**2,768,591**	**-**	**-**	**5,513.16**

Percent of Requirements by Major Function - All Funds

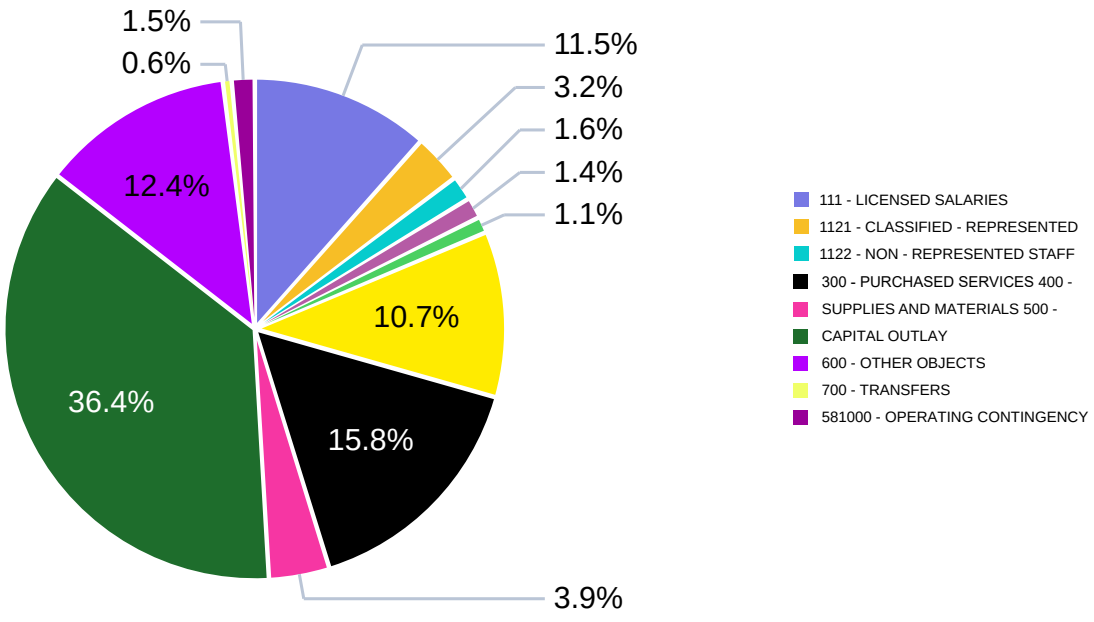


- **Major objects** include salaries, payroll benefits, purchased services, supplies and materials, capital outlay, other objects, transfers, and reserves. Capital Outlay represents the largest individual object budget category at $1.01 billion, or 36.4% of all funds. Salaries and associated payroll costs are the second largest budget category at $814.0 million, or 29.4% of all funds. Purchased Services is the third largest budget category at $437.0 million or 15.8%.

Summary of Requirements by Major Object - All Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
111 - LICENSED SALARIES	295,502	310,693	321,412	324,027	**3,273.27**	318,923	-	-	**3,135.61**
1121 - CLASSIFIED - REPRESENTED	79,049	85,380	87,663	89,881	**1,822.57**	87,963	-	-	**1,760.18**
1122 - NON - REPRESENTED STAFF	46,774	48,867	50,209	51,769	**485.98**	44,089	-	-	**395.68**
113 - ADMINISTRATORS	40,259	42,416	42,880	41,930	**253.65**	37,607	-	-	**221.70**
OTHER SALARIES	39,074	45,305	42,743	17,363	-	29,079	-	-	-
200 - ASSOCIATED PAYROLL COSTS	234,737	254,486	256,389	296,271	-	296,375	-	-	-
300 - PURCHASED SERVICES	174,355	185,976	183,612	269,919	-	436,973	-	-	-
400 - SUPPLIES AND MATERIALS	74,662	57,296	51,796	61,900	-	108,288	-	-	-
500 - CAPITAL OUTLAY	216,049	249,085	107,057	489,669	-	1,007,787	-	-	-
600 - OTHER OBJECTS	254,443	273,755	288,146	308,953	-	344,685	-	-	-
700 - TRANSFERS	1,901	1,505	11,262	41,756	-	15,767	-	-	-
581000 - Operating Contingency	-	-	-	41,679	-	41,056	-	-	-
376520 - Budgeted Ending Fund Balance	895,164	624,938	531,667	-	-	-	-	-	-
Total Requirements	**2,351,970**	**2,179,703**	**1,974,836**	**2,035,117**	**5,835.46**	**2,768,591**	**-**	**-**	**5,513.16**

Percent of Requirements by Major Object - All Funds



Contingencies and Unappropriated Ending Fund Balance

Contingencies are reserved for expenditures that cannot be foreseen and planned in the budget process because of the occurrence of an unusual or extraordinary event. From 2025-26 to 2026-27, the total budgeted contingency will decrease by 1.5% from $41.7 million to $41.1 million. Assuming the contingency funds remain unspent throughout the year, the resulting ending General Fund balance will be $41.1 million.

The 2026-27 fund balance reflects the conclusion of a drawdown of reserves, meeting the minimum 5% requirement. The Board and District intend to continue to maintain required reserves in future years by making additional expenditure reductions as needed (including in 2027-28).

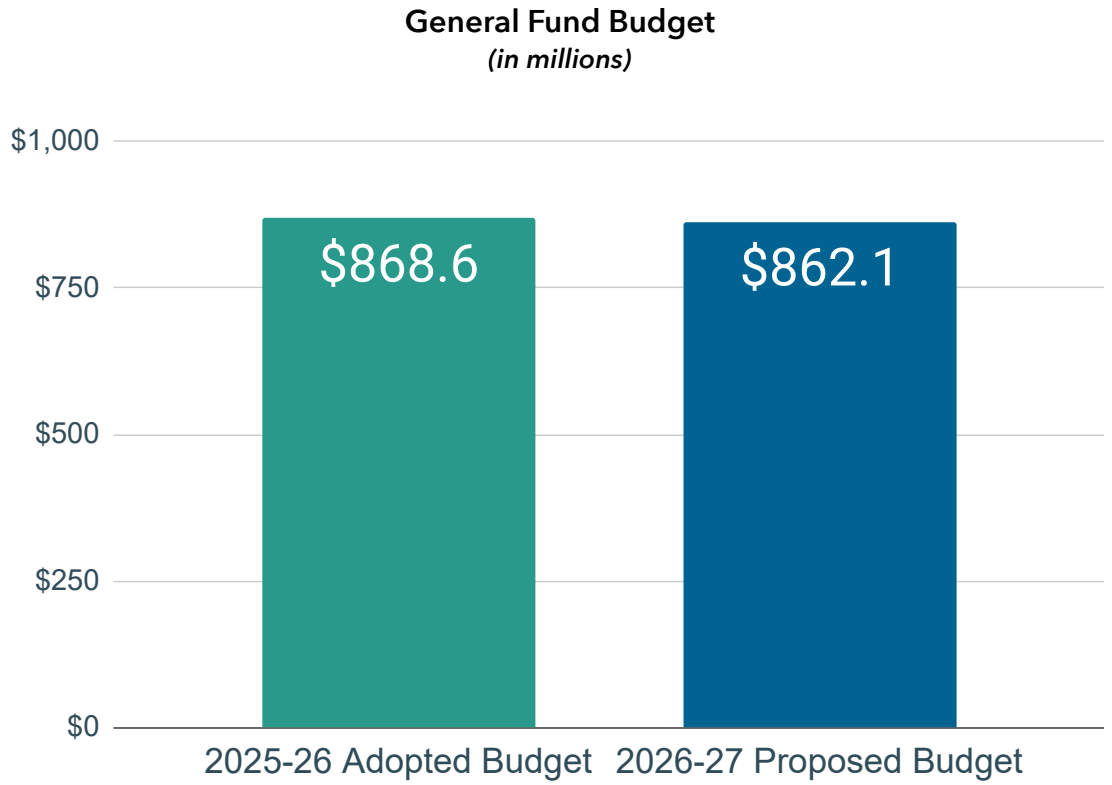
Ending Fund Balance is an estimate of funds needed to maintain operations of the District from July 1 of the ensuing fiscal year to the time when sufficient new revenues become available to meet the cash flow needs of the fund. No expenditure shall be made from the unappropriated ending fund balance in the year in which it is budgeted.

While we consistently end the year with an actual ending fund balance in our financial statements, PPS practice is to budget these reserves as Contingency rather than as an explicitly budgeted Ending Fund Balance. The reasoning is tied directly to legal expenditure restrictions: because funds cannot be spent from an unappropriated ending fund balance during the fiscal year they are budgeted, classifying these reserves as contingency preserves the District's operational flexibility to legally access them in the event of an unforeseen emergency.

General Fund Budget

General Fund

The General Fund budget decreased by 0.7%, or $6.5 million, from $868.6 million in 2026-25 to $862.1 million in 2026-27, including a contingency of $41.1 million.

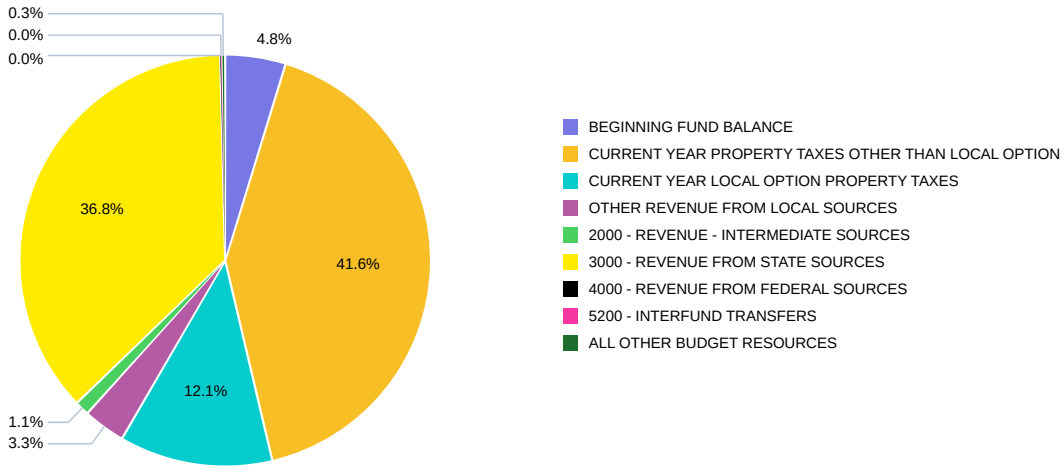


General Fund Resources

In 2026-27, the budgeted resources for the General Fund total $862.1 million, a decrease of $6.5 million compared to the 2025-26 budget.

The 2026-27 resources include property taxes, local option property taxes, local, intermediate, state, interfund transfers, and other sources. The primary sources of revenue for the General Fund are Property Taxes Other Than Local Option totaling $358.2 million or 41.6%, State Sources totaling $317.1 million or 36.8%, and Local Option Property Taxes totaling $103.9 million or 12.1% of all sources.

Percent of Resources by Major Object 100 - General Funds



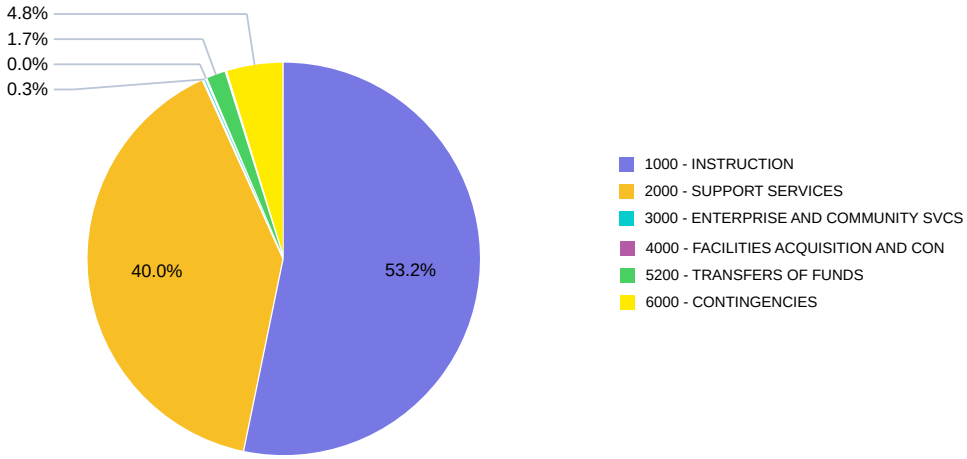
General Fund Requirements

The 2026-27 proposed requirements for the General Fund decreased by $6.5 million compared to the 2025-26 budget.

Expenditures are categorized by major function and major object.

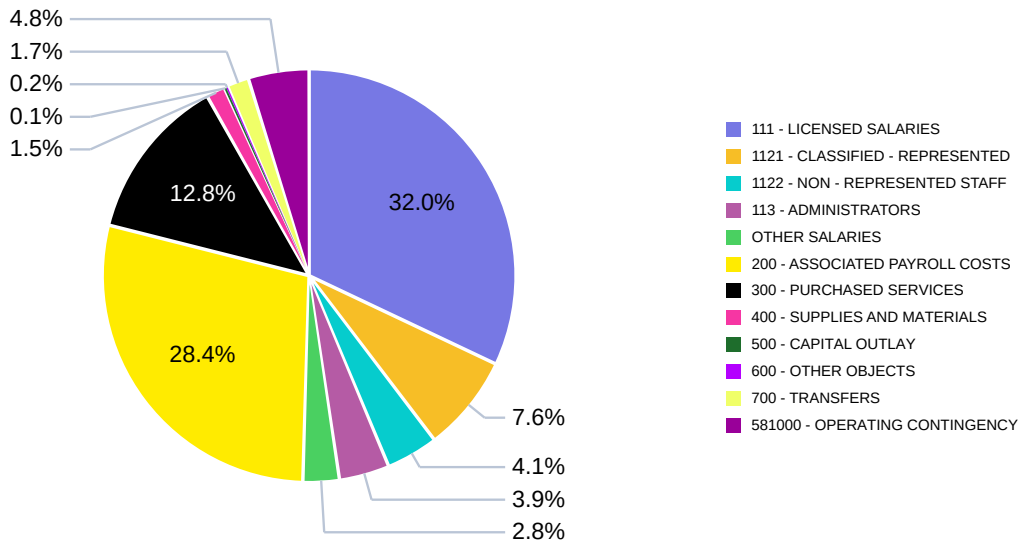
- **Major functions** include classroom instruction, support services, enterprise and community services, facility acquisition and construction, debts, transfers out, contingency, and ending fund balance. Instruction is the largest budget category at $458.9 million or 53.2% of the General Fund. Support Services is the second largest budget category at $345.0 million or 40.0% of the General Fund.

Percent of Requirements by Major Function 100 - General Funds



- **Major objects** include salaries, payroll benefits, purchased services, supplies and materials, capital outlay, other objects, transfers, and reserves. Salaries and associated payroll costs are the largest budget category at $680.5 million, or 78.9% of the General Fund.

Percent of Requirements by Major Object 100 - General Funds

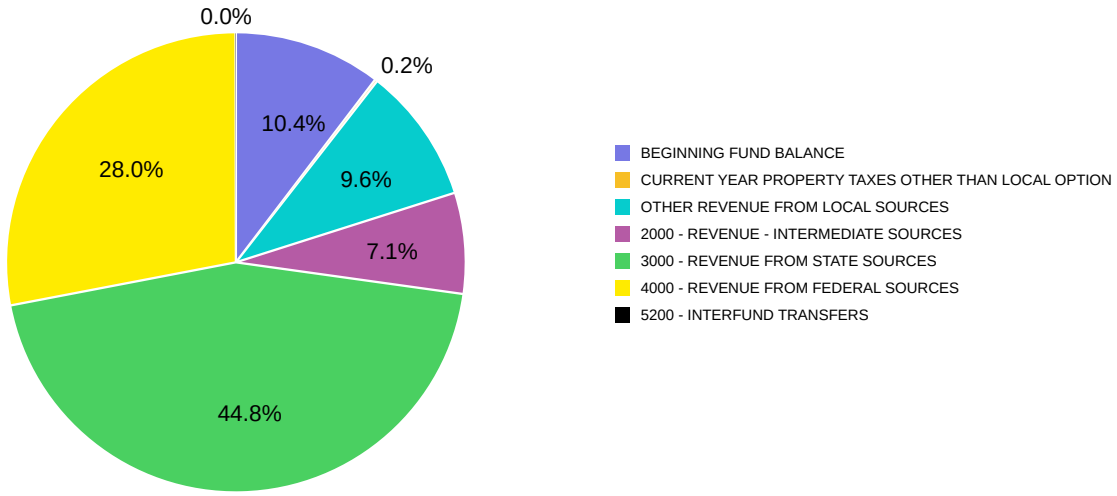


Special Revenue Fund

The 2026-27 budget for the Special Revenue Fund reflects projected grant revenues, expenditures, and the estimated beginning fund balance, which will be used to support programs from July 1 through September 30.

Total resources for the Special Revenue Fund are projected to decrease by $0.9 million, or 0.4%, from $224.8 million in 2025-26 to $223.9 million in 2026-27. This modest decrease is primarily driven by a lower beginning fund balance, which is expected to decrease by $15.8 million, along with $7.8 million in reduced revenue from federal sources primarily attributable to a reduction in Title Program ($4.1 million), Columbia Regional Program (CRP) ($1.3 million) & School Based Mental Health ($1.0 million) grants. Intermediate sources are projected to grow by $13.4 million, mostly attributable to shifting Portland Clean Energy Funds (PCEF) from Fund 435. Local revenues increased by $5.9 million, reflecting continued funding for essential grant-supported programs. Included in these resources is the Cafeteria Fund (202), which accounts for $26.5 million in projected requirements to provide student nutrition services, supported largely by $18.6 million in federal meal reimbursements.

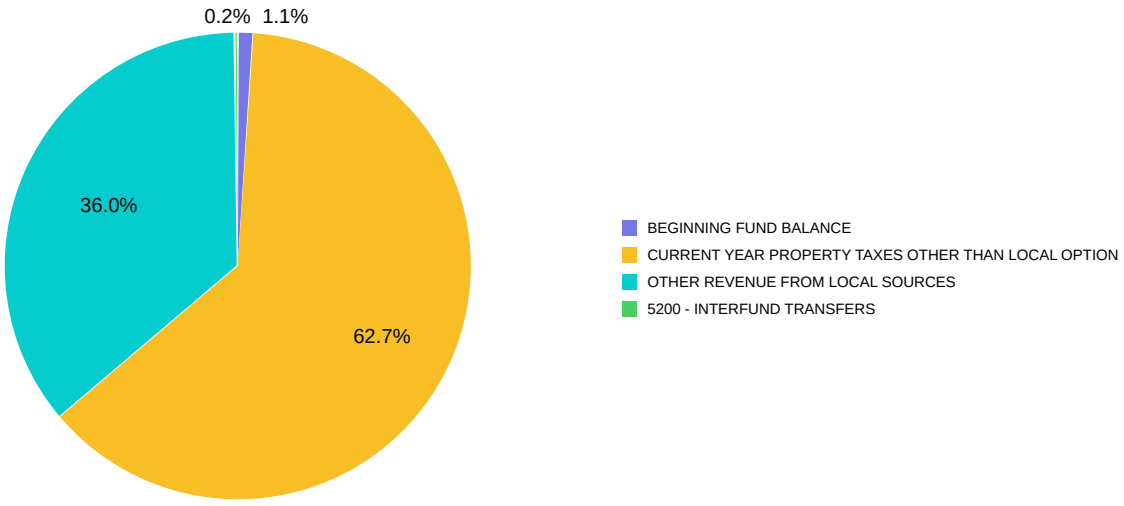
Percent of Resources by Major Object - 200 - Special Revenue Funds



Debt Service Fund

The growth of the Debt Service Fund by 2.3% is mainly due to an increase in property tax revenue proportionate to the debt service obligation, including the issuance of bonds. Debt repayment schedules have been structured to grow with assessed property values in an effort to keep millage rates stable over the life of the debt. Total resources in this fund are expected to grow from $272.7 million in 2025-26 to $278.9 million in 2026-27. These resources will be used to pay down the principal and interest on current debt. The levy rate is projected to remain at the current target rate of $2.50 per $1,000 of assessed value.

Percent of Resources by Major Object - 300 - Debt Service Funds

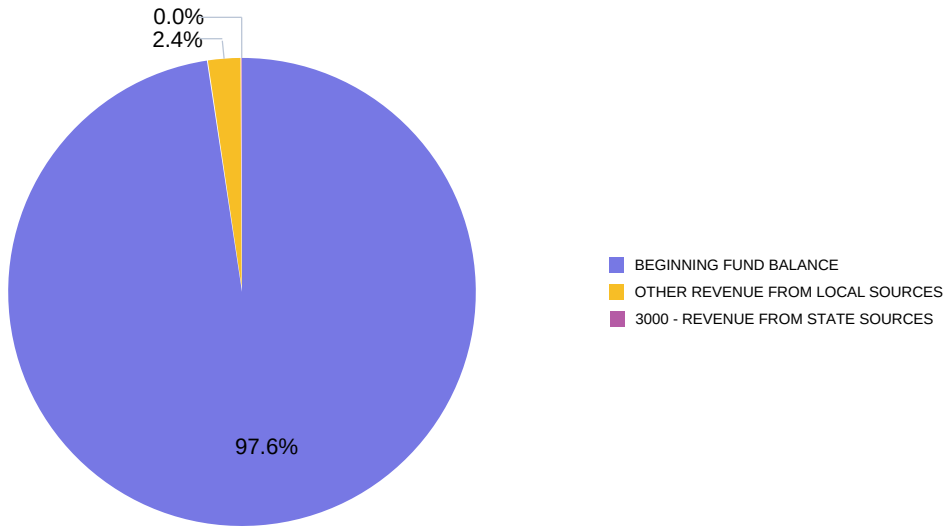


Capital Projects Fund

The Capital Projects Fund is expected to increase by 114.8% from $643.8 million to $1.38 billion. This growth is mainly attributed to the 2025-26 bond sale and the remaining funds budgeted as beginning fund balance.

As part of the strategy to balance the operational budget and prioritize direct student supports, the District is pausing the annual $1.0 million transfer from the General Fund to the Capital Asset Renewal Fund for the 2026-27 fiscal year. Formally created during the 2012-13 budget process (Board Policy 8.70.044-P), this fund manages expenditures for specifically designated capital projects. Because the District's large-scale capital needs are currently supported by $1.38 billion in voter-approved bond funds, pausing this transfer preserves essential operating dollars for the classroom.

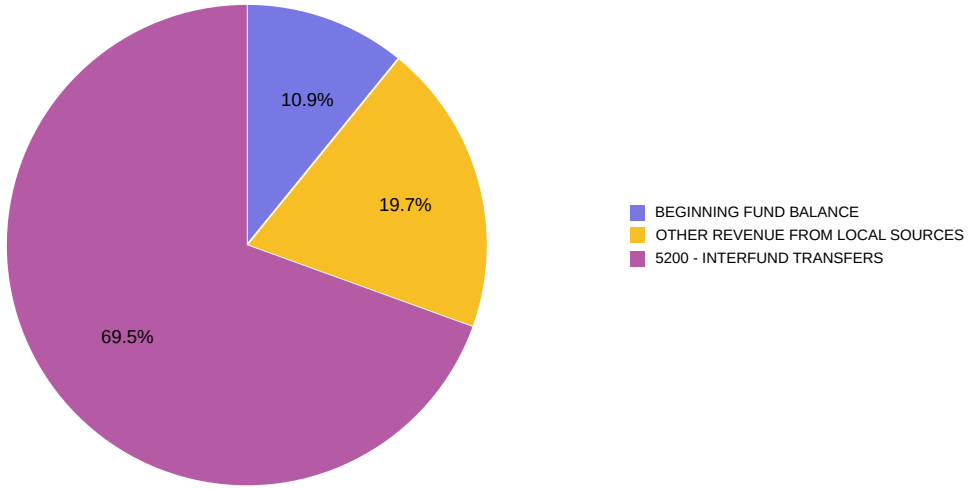
Percent of Resources by Major Object - 400 - Capital Projects Funds



Internal Service Fund

The Internal Service Fund decreased by 16.3% from $25.3 million to $21.2 million as service costs are aligned annually with trending expenditures.

Percent of Resources by Major Object - 600 - Internal Service Funds



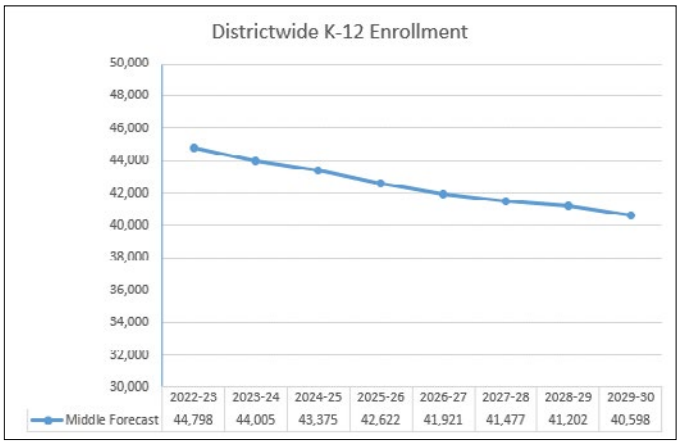
STATE SCHOOL FUND GRANTS AND PROPERTY TAX REVENUES

State School Fund and property taxes are primary sources of Portland Public Schools' Operating Fund, General Fund. The Legislature determines how much money is available from State sources such as income taxes, and local sources primarily property taxes.

State School Fund (SSF)

The State School Fund was created in response to the requirement that the state replace school tax revenue lost under Measure 5. The legislature created the State School Fund (SSF) and established an equalization formula to allocate revenue to schools on a weighted per-student basis.

State School Fund is calculated based on enrollment. A per-student amount consists of two different enrollment numbers: average daily membership, resident (ADMr) and average daily membership, weighted (ADMw). The ADMr number represents the average number of students enrolled in Portland Public Schools on a daily basis. The ADMw is an adjusted number to compensate for the high costs of educating certain groups of students, such as English Language Learners, special education, pregnant or parenting, income at or below poverty and students in foster care.



The enrollment chart shows the actual October enrollment by year along with the middle projection provided by Portland State University's Population and Research Center (PRC). PPS has not recovered from the enrollment loss from the pandemic and the continued low birth rate in Portland, but is trying new strategies to get more students enrolled, including an enrollment campaign. The graph below shows the continued declining enrollment and future projections.

Property Taxes

Property taxes from each school district's permanent rate are deducted from the General Purpose Grant to determine the amount the school district will receive from the State School Fund Grant. However, the property taxes from the 2009 Legislature gap bond and local option levy are excluded from the per student state school funding calculations.

Property owners are taxed on the combined rates of education and debt service to repay bond expenses from Measure 5. The permanent property tax rate for Portland Public Schools is $5.2781 per $1,000 of assessed value.

Assessed values are limited to 3% increases a year unless there is new construction. Even if the market value is reduced, the assessed value can still go up by 3%. If the assessed value reaches the market value, it can only increase if the market value increases.

The permanent tax rates are determined by the State of Oregon Constitution and State Statutes. Existing districts cannot increase their permanent rate authority. Rates for debt services are set based on each year's requirements. For more information on the Gap Tax please see

https://www.oregonlegislature.gov/lro/Documents/report%205-99.pdf

The taxes levied are based upon the tax collection year July 1 to June 30.

SCHOOL STAFFING CHANGES

School staffing for 2026-27 was based on projected October 2026 enrollment, which primarily uses the actual October 2025 enrollment as the base, with adjustments made for population and housing changes and the grade progression rates at each school. Enrollment is still declining and expected to continue to decline, but not at the rate experienced during the pandemic.

Our focus has been to maintain investments that have the biggest impact on student outcomes while supporting fiscal sustainability in our system. Schools were given more discretion in using some of the allocations for what would make the best impact for their school.

School staffing changes have been applied at all school levels. All schools were given discretionary FTE with some requirements of the use of the FTE. K-5/K-8/6-8 Discretionary FTE must be used for either an Instructional Coach, Interventionist, School Climate Specialist, Social Worker or Counselor. 9-12 Discretionary FTE replaces the prior Admin Support table and there is a minimum for class size in grades 6-12 of 15, noting exceptions may be considered.

More detailed information about the staffing allocations to the schools, including the General Fund, Arts Tax, the Student Investment Account (SIA), and Grants, with notation of where allocations are differentiated based on school designations, can be found in the Informational section of this book.

English Language Development (ELD) Staffing

English Language Development (ELD) school-based funding and staffing is a supplemental allocation intended to support school ELD programs and services for multilingual learners (ML) who qualify for ELD services. ELD staffing allocations, for both classified and licensed staff, must be used to help students attain proficiency in English, which is critical to their overall academic success and required by federal and state laws. ELD FTE may only be used for ELD services and for ELD-classified students.

ELD licensed and classified FTE is allocated based on weighting students based on ELPA proficiency levels and qualification for ELD services. For example, PISA students are high school newcomers to the United States; Emerging students have lower levels of proficiency and require more support in comparison to a student who is identified as progressing. For the 2025-26 school year, a small formula correction was made by adding SIFE (Students with Interrupted or Inconsistent Formal Education) students to receive the highest weight along with PISA students to account for students with the highest need in all of our schools. Additional itinerant positions were added for 2026-27 to ensure students receive services where unexpected enrollment and ELD service needs arise when school begins. In addition, for 2026-27, the ranges changed for the ELD teacher and EA allocations.

More detailed information about these allocations can be found in the Informational section of this book.

Special Education (SPED) Staffing

There have not been significant changes to SPED staffing, but allocations have been adjusted. Like ELD, the resources follow the students so there are shifts between schools to meet student needs. Continuing in 2026-27, schools implementing the Neighborhood Schools Model are assigned staff using the PPS Student Level of Need Matrix. More detailed information about these allocations can be found in the Informational section of this book.

Special Education funding must only be used to provide special education, related and supplementary aids and services, specifically written into a student's individualized education plan (IEP), for students determined eligible for special education. Special Education resources are supplemental to the core and intervention instructional program and are not allocated to supplant the core instructional or intervention resources. Special Education staff include Learning Center teachers, Speech Pathologists, School Psychologists, Paraeducators, Physical Therapists, Occupational Therapists, and other specialists.

Allocations of teachers and assistants are made on the basis of the best information available at the time staffing is completed in the spring. Depending upon the resources available, these allocations may be adjusted based on updated enrollment information in late spring and at the beginning of the school year.

CAPITAL PROJECTS SUMMARY

Real Estate, Infrastructure and School Enhancement (RISE) serves as PPS's unified capital projects department, providing strategic stewardship of district facilities and assets by delivering safe, modern and equitable learning environments.

Voter-approved bond measures are the primary funding source for major capital improvement projects, including school modernization.

Capital improvement bonds passed in 2012, 2017, 2020, and 2025 totaling approximately $4.3 billion to upgrade PPS Schools. See more: bond.pps.net

In November 2012 and May 2017, Portland voters overwhelmingly supported capital improvement bonds totaling nearly $1.30 billion to upgrade PPS schools. In November of 2020, Portland voters supported a third capital improvement bond totaling $1.20 billion.

The 2012 School Building Improvement Bond, totaling $482 million, enabled the district to make improvements in more than 51 schools, including seismic, accessibility and science classroom upgrades. In addition, Franklin, Roosevelt and Grant High Schools were modernized and Faubion PK-8 was completely rebuilt. All planned work is complete; some minor funds remain that may be used for bond-compensable projects once all other project funding reconciliations are complete.

The $790 million May 2017 Health, Safety and Modernization Bond is currently underway. McDaniel High School (formerly known as Madison High School) has been completely modernized and a new Kellogg Middle School has been built, with both opening to students in fall 2021. The new Lincoln High School opened to students in fall 2022; work on the Lincoln High School track and fields was completed for the start of the 2023-24 school year. The modernized Benson Polytechnic High School was opened to students in fall 2024. Over $150 million was directed to Health & Safety improvement projects that have affected every school in the District:

- Water quality improvements
- Security upgrades
- New roofs
- Asbestos and radon remediation
- Lead paint stabilization
- New fire alarms and sprinklers
- Accessibility improvements
- Seismic retrofits

The $1.2 billion November 2020 School Bond is allowing PPS to continue the work of improving the health and safety of our aging school buildings with new roofs and mechanical systems, seismic retrofits, accessibility upgrades, improved Special Education learning environments, and security upgrades. The modernization of Jefferson High School is in its design phase and anticipated to begin construction of buildings in 2027. The Center for Student Excellence is in the process of defining its program and operational structure after recently acquiring a physical location. The new hayu alqi uyxat building (formerly known as Multiple Pathways to Graduation building) on the Benson campus opened to students in fall 2024. The modernization planning and design of

Cleveland High School and Ida B. Wells High School (formerly known as Wilson High School) are in progress. A concept plan and conceptual budget study were completed for building additional capacity at Roosevelt High School. Health and safety projects have been in construction since 2021 and will continue forward over the next year. Adoption of new curricula and deployment of technology upgrades have also been underway since 2021.

In May of 2025, Portland voters passed a bond for $1.83 billion to finance capital costs. Projects will update and repair aging elementary and middle schools, update safety and security systems, update seismic performance, and modernize high schools. The bond will also include capital funding for new curriculum materials and technology, including student devices. Athletic improvements are also planned in the May 2025 School Bond program.

RISE's Project & Construction Management group manages planned, volunteer, and emergency repair/replacement work across the District.

Learn about RISE's capital projects work: pps.net/rise

School Board

Zone	Board Member	Board Term Expires
1	Christy Splitt	June 30, 2027
2	Michelle DePass (Vice Chair)	June 30, 2027
3	Patte Sullivan	June 30, 2027
4	Rashelle Chase-Miller	June 30, 2029
5	Virginia La Forte	June 30, 2029
6	Stephanie Engelsman	June 30, 2029
7	Edward (Eddie) Wang (Chair)	June 30, 2027
Student Representative	Ian Ritorto	June 30, 2026

Community Budget Review Committee (CBRC)

Committee Member	Committee Term Expires
Minyana Bishop	June 30, 2027
Angela Bonilla (Vice Chair)	June 30, 2028
Anne Cherry	June 30, 2028
Shain Corey	June 30, 2028
Karanja Crews (Co-Chair)	June 30, 2028
Aaron Cronan	June 30, 2026
Rhonda Gray	June 30, 2028
Jen Grey-O'Connor	June 30, 2026
Laura Hernandez	June 30, 2028
Andy Jacob	June 30, 2028
Adriel Person (Co-Chair)	June 30, 2026
Julia Plowman	June 30, 2028
Shannon Staley	June 30, 2028
Jiaying (Sirena) Chen (Student Member)	June 30, 2026
Emma Lee (Student Member)	June 30, 2026
Eli Posada (Student Member)	June 30, 2026
Keira Toll (Student Member)	June 30, 2026
Paxton Tomczyk (Student Member)	June 30, 2026

Administrative Personnel

Name	Title
Dr. Kimberlee Armstrong	Superintendent
Dr. Renard Adams	Chief Accountability & Equity Officer
Jey Buno	Chief of Student Support Services
Dr. Isaac Cardona	Chief of Schools
Dr. Jon Franco	Senior Chief of Operations
Dr. Angela Freeman	Chief Human Resources Officer
Candice Grose	Chief of Communications
Kristina Howard	Senior Chief of Academics
Deborah Kafoury	Chief of Staff
Michelle Morrison	Chief Financial Officer
Tom Odgers	Chief of Integrated Operations
Sharon Toncray	Chief Legal Officer

ORGANIZATIONAL SECTION

ORGANIZATIONAL SECTION

The organizational section is comprised of general information about the District and its budget, including the level of education provided, geographic area served, and number of schools and students. Also included in this section are significant budget and financial policies, procedures and regulations as well as a detailed description of the budget process.

Ida B. Wells High School - PIL Football Ida B. Wells vs McDaniel, September 19, 2025

THE DISTRICT AND THE COMMUNITY

General Information

Established in 1851, Portland Public Schools is the largest and oldest school district in the State of Oregon. Located in Northwestern Oregon at the confluence of the Columbia and Willamette Rivers, the District covers an area over 152 square miles. The district boundaries include portions of the cities of Portland (pop. 635,749), Lake Oswego (pop. 40,029), and Milwaukie (pop. 21,620), based on the July 2024 data from the U.S. Census Bureau, Population Estimates Program (PEP). The District owns and maintains over 100 campuses (schools and other uses) with more than 300 buildings and a total floor area of more than 9 million square feet. Please see Volume 2 for building location, age, and grade level information.

The Portland Public School District Board, elected by a majority of the voting electorate, is the governing body responsible for the District's public decisions. The seven-member Board has oversight responsibility and control over all activities related to the District. The Board is accountable for all fiscal matters that significantly influence operations.



Rose City Park Elementary School - Tet Celebration, February 13, 2026



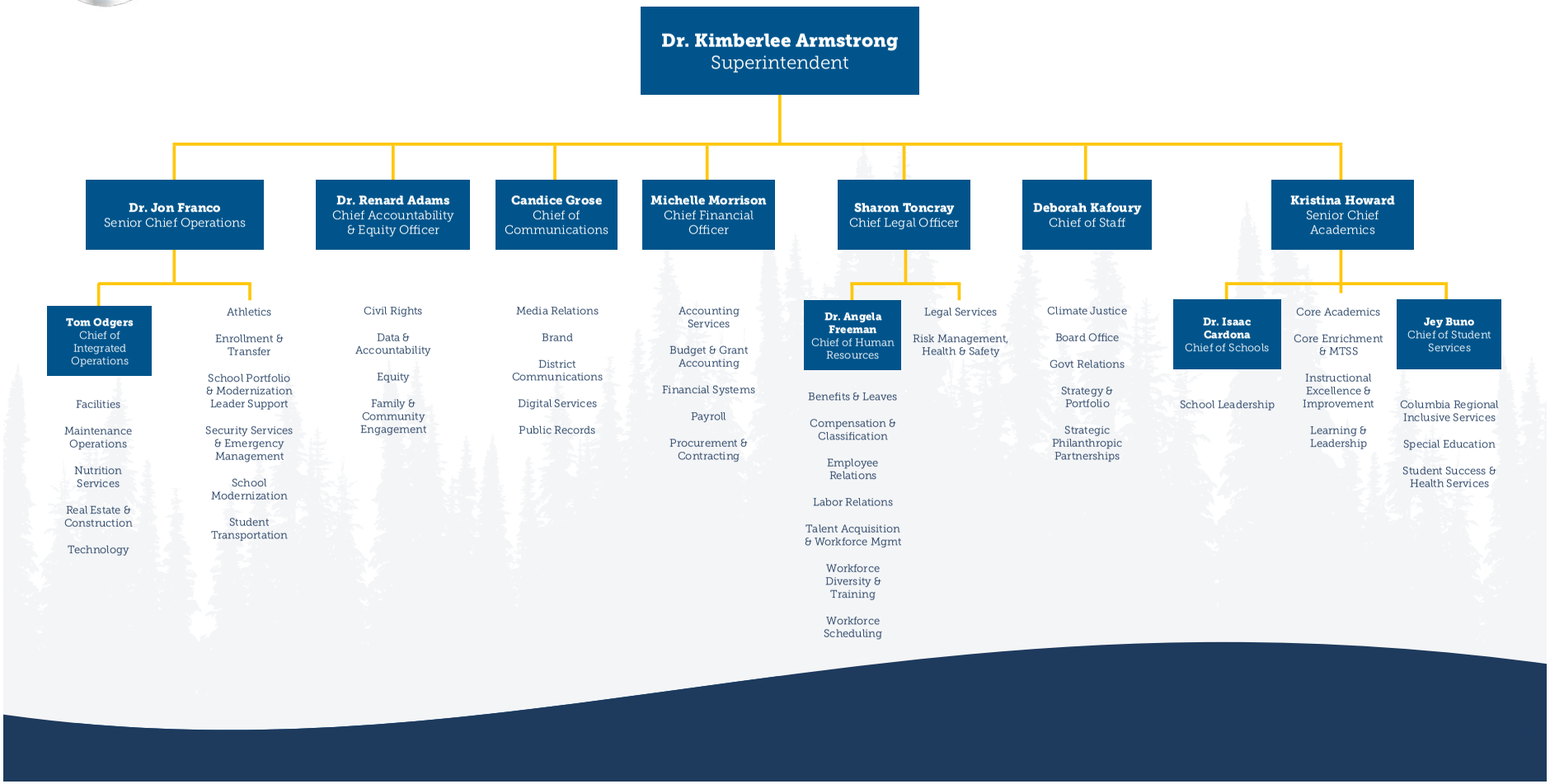
Prophet Education Center - District Student Council, October 21, 2025



Jefferson High School - Orange Shirt Day, September 25, 2025

PPS Leadership 2025-26

Effective: July 1, 2025



THE BOARD OF EDUCATION

The Board of Education (also referred to as School Board or Board) is the chief governing body of the District and is accountable for all fiscal matters that significantly affect operations. Its seven elected members establish and oversee the District's policies, and appoint the Superintendent of the District.

The School Board establishes guidelines and regulations concerning organization, general policies, and major plans and procedures for the District. They are legally responsible for the education of all children residing within the 152-square-mile school district. The Board requires the Superintendent to manage the budget, direct over 7,000 employees, supervise approximately 43,000 students, and make recommendations on the operation of the District.

The School Board holds one monthly regular meeting to consider, discuss, and determine District direction on a wide range of issues. Special meetings or work sessions are held monthly to discuss specific topics. Meeting dates may be obtained at https://www.pps.net/board/board-of-education/board-main-page under the Board Calendar and Public Notices links.

Voters living within District boundaries (including most of the City of Portland and portions of unincorporated Multnomah, Clackamas, and Washington Counties) elect Board members by zones. School Board members serve four-year terms without compensation and may be reelected. School Board Student Representatives, selected by the Superintendent's Student Advisory Committee, serve as unofficial voting members for one year to represent the students and to report on various activities.



Zone 1
Christy Splitt

csplitt@pps.net
Current Term: 7/2025-6/2027



Zone 2
Michelle DePass (Vice Chair)

mdepass@pps.net
Current Term: 7/2023-6/2027



Zone 3
Patte Sullivan

psullivan@pps.net
Current Term: 7/2023-6/2027



Zone 4
Rashelle Chase-Miller

rchasemiller@pps.net
Current Term: 7/2025 - 6/2029



Zone 5
Virginia La Forte

vlaforte@pps.net
Current Term: 7/2025 - 6/2029



Zone 6
Stephanie Engelsman

sengelsman@pps.net
Current Term: 7/2025 - 6/2029



Zone 7
Edward (Eddie) Wang (Chair)

eddiewang@pps.net
Current Term: 7/2023-6/2027



Student Representative
Ian Ritorto

iritorto@pps.net
Current Term: 7/2025 - 6/2026

PORTLAND PUBLIC SCHOOLS

2025-26 Facility Sites with Attendance Areas

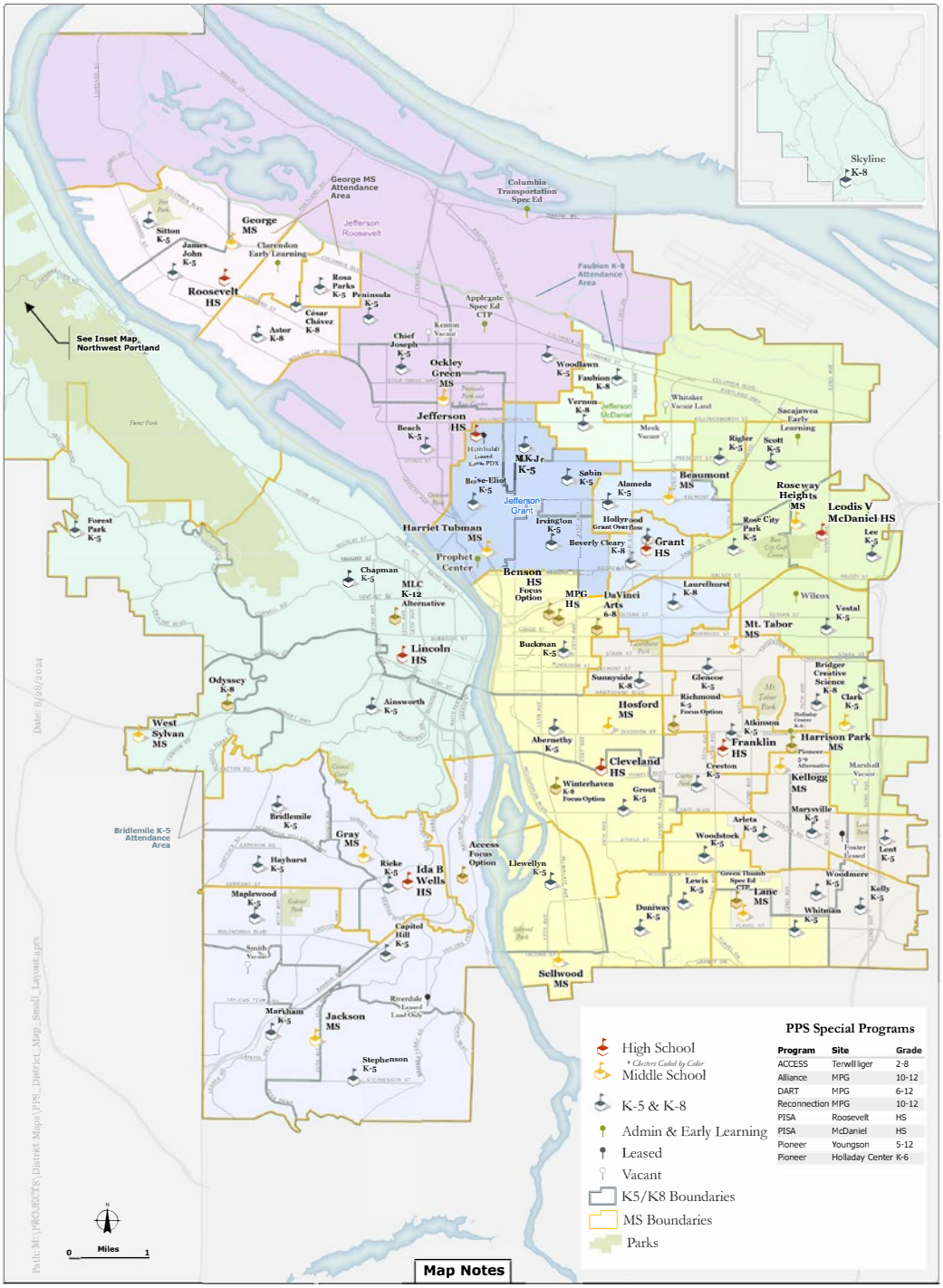
Portland Public Schools is the largest of six school districts within the city of Portland, educating approximately 43,000 students. Every K-12 student has a neighborhood school based on home address.

General information: *www.pps.net, 503-916-2000*
Detailed School Boundaries: *www.pps.net/map*
School Boundaries Do Not Reflect City or County Lines

Map Notes:

Rigler is a Spanish Immersion School, with the option to attend Scott Elementary. Rigler students attend either Beaumont MS for Spanish Immersion or Roseway Heights MS.

The Willamette River is a functional boundaryfor all attendance areas. School boundaries do not reflect city or county lines.



BOARD OF EDUCATION GOALS FOR STUDENTS

The PPS School Board has adopted 2022-2027 Board of Education Goals in the following areas:

- Third Grade Reading
- Fifth Grade Mathematics
- Eighth Grade Readiness
- High School Graduation

These goals seek to close opportunity and outcome gaps. The Board has identified benchmarks along the Pre-K to 12 academic continuum. These benchmarks allow the District to gauge student progress towards realizing the Graduate Portrait.

The goals are introduced as follows:

It remains the core mission and responsibility of our school system to ensure that every student has opportunities to thrive and experience success. Unfortunately, too many students have been historically underserved, and there has not been evidence of racial equity in PPS as revealed by persistent gaps in student outcomes along the lines of race. We are dedicated to the continuous improvements necessary to drive the system shifts that will better support our students, educators, and leaders and result in improved student performance. This will include a focus on building our individual and organizational capacity through ongoing professional learning and differentiated support for teachers, leaders, and central office staff.

We understand that this work will require focus and intentionality to interrogate how we serve the unique needs of our students, especially for students of color and other students who need us to accelerate their growth so that they are able to demonstrate both grade-level proficiency and the skills and dispositions described in our Graduate Portrait.

Included here are a set of academic milestones along the pre-K to 12 continuum that we intend to progress monitor and hold ourselves accountable to achieving. Since students of color currently demonstrate the greatest gaps in achievement and performance, our goals reinforce an explicit expectation of accelerated growth and gap closure for students of color. ***To be clear, the gaps in student performance along the lines of race are persistent, generational, unacceptable, and at odds with our belief that all students can learn. Here at PPS, we intend to eliminate gaps in opportunity and outcomes completely.*** *We will begin this work with a focused effort on narrowing the persistent gaps in student outcomes in order to eventually eliminate these gaps completely.*

Source: https://resources.finalsite.net/images/v1751566673/ppsnet/ozirjiifxutfuhipqrdt/2022-2027boardgoals.pdf

Overview of Goals

TOGETHER, WE RISE

District Continuous Improvement Plan 2025-2028

GOALS

By June 2028, and in addition to the targeted focus on Literacy and Math Continuous Improvement at the site level in 2025–26, all students in all PK-12+ classrooms will: Know and understand the learning target and success criteria, successfully engage in grade-level and standards-aligned tasks from district-approved, high-quality instructional materials and structures, self-assess their learning and explain and justify their thinking connected to the learning target and success criteria. This will have a particular focus on our district's focal students.

ATTENDANCE

By June 2028, the overall percentage of students with good or acceptable attendance rates will increase by 15%, from 67% to 82%. In order to reduce the disproportionate gap, the percentage of students with good or acceptable attendance for all focal groups (Black & Native students, multilingual learners, students receiving special education services, and students experiencing poverty) will increase by 24%.

9TH GRADE SUCCESS

We will accelerate achievement and eliminate early high school opportunity gaps by ensuring all students finish 9th grade On Track. Our goal is to increase the percentage of all students finishing 9th grade On Track from 75% (June 2024) to 95% by June 2028, while closing the opportunity and outcome gap for focal students by increasing their On-Track rate from 53% to 95% over the same time period.

LITERACY

By June 2028, all students in 100% of PK-12+ Language Arts classrooms - with a particular focus on our district's most impacted focal students based upon our data (Native students, Black students, multilingual learners, students receiving special education services, and students experiencing poverty) - will (1) know and understand the learning target and success criteria and (2) successfully engage in grade-level and standards-aligned tasks from district-approved high-quality instructional materials and structures.

MATHEMATICS

By June 2028, all students in 100% of PK-12+ Mathematics classrooms -with a particular focus on district focal students (Native students, Black students, multilingual learners, students receiving special education services, and students experiencing poverty) - will (1) know and understand the learning target and success criteria and (2) successfully engage in grade-level and standards-aligned tasks from district approved high-quality instructional materials and structures.

Overview of Strategies



ATTENDANCE

Tier 1 Integrated Climate & Culture Practices

Data-based Attendance Review and Response

School & Community-wide Attendance Initiative

9TH GRADE SUCCESS

Data Access & Literacy

Team Structures & Processes

Intervention Strategies

Transition Support

Instructional Practices

LITERACY

High-Quality, Inclusive Core Instruction

Assessment, Data, & Intervention: Formative Analysis and Differentiated Support

Family and Community Engagement

MATHEMATICS

High-Quality, Inclusive Core Instruction

Assessment, Data, & Intervention: Formative Analysis and Differentiated Support

Family and Community Engagement

KEY STRATEGIC INVESTMENTS

PPS Key Strategic Investments for 2026-27

This budget funds several key initiatives. These areas of investment represent promising strategies focused on improving student outcomes and eliminating achievement gaps. All of these investments support progress on 2022-2027 Board of Education Goals. Investments also advance strategic outcomes within PPS's District Continuous Improvement Plan.

Advancing Attendance, $0.5 million

Strategy	Action Description	Funding Source
Tier 1 Integrated Climate & Culture Practices	The central office team provides school leaders and climate teams with expectations, professional learning, coaching and implementation tools centered on strengthening Tier I integrated Climate and Culture practices (TSEL, PBIS, RJ, RESJ) both schoolwide and in every learning space, with a focus on Black and Native students, Multilingual Learners and students receiving special education supports.	General Fund SIA Title IIA
Data-based Attendance Review and Response	The central office team provides school leaders and Attendance Support and Student Engagement Teams (ASERT) with expectations, guidance, and implementation tools to strengthen tiered systems of support for chronic, severe and acute chronic absenteeism, with a focus on Black and Native students	General Fund

Advancing Mathematics, $1.2 million

Strategy	Action Description	Funding Source
High-Quality, Inclusive Core Instruction	The central office team provides school leaders and leadership teams with clear expectations, models, professional learning, coaching, and feedback on (1) intentional use of adopted curricular resources; (2) planning around, and communication of, clear learning targets and success criteria; and (3) instructional strategies and appropriate scaffolds to cognitively engage all learners in grade-level standards-aligned tasks to ensure meaningful access for all learners.	General Fund SIA Title IIA 21st Century Partnership for STEM Education (21PSTEM)
Assessment, Data, & Intervention: Formative Analysis and Differentiated Support	The central office team works with school leaders and leadership teams to develop systems and competencies within our schools that allow staff to identify and support K-12th grade students in need of Tier 2 and 3 mathematics supports (in addition to strong, research-based, engaging, differentiated core Mathematics instruction).	SIA Title I
Family and Community Engagement	The central office engages in an equity-centered Design Team Process — including mathematics content experts, school leaders, and family engagement practitioners — that will collaboratively develop a districtwide Family Mathematics Framework inclusive of (1) regular home-school communication about mathematics curriculum and instruction, (2) regular home-school communication about individual student progress toward grade-level mathematics benchmarks, and (3) school-based family mathematics events designed to educate and empower families as partners in their children's mathematics learning journeys with an aligned implementation toolkit that supports culturally responsive, academically focused home–school partnership.	Title II/IV

Advancing Literacy, $6.7 million

Strategy	Action Description	Funding Source
High-Quality, Inclusive Core Instruction	The central office team provides school leaders and leadership teams with clear expectations, modeling, professional learning, coaching, and feedback focused on instruction grounded in learning targets, success criteria and engagement strategies aligned to our Language Arts/English high-quality instructional materials (HQIM).	Comprehensive Literacy State Development Grant (CLSD) Early Literacy Success School District Grants (ELSG) General Fund SIA Title IIA
Assessment, Data, & Intervention: Formative Analysis and Differentiated Support	The central office team works with school leaders and leadership teams to develop systems and competencies within our schools that allow staff to identify and support students in need of Tier II and III literacy supports (in addition to strong, research-based, engaging, differentiated core literacy instruction).	CLSD ELSG General Fund SIA Title I
Family and Community Engagement	The central office engages in an equity-centered Design Team Process – including literacy content experts, school leaders, and family engagement practitioners – that will collaboratively develop a districtwide Family Literacy Framework inclusive of (1) regular home-school communication about literacy curriculum and instruction, (2) regular home-school communication about individual student progress toward grade-level reading benchmarks, and (3) school-based family literacy events designed to educate and empower families as partners in their children's literacy learning journeys with an aligned implementation toolkit that supports culturally responsive, academically focused home–school partnerships.	CLSD ELSG Title II/IV

9th Grade Success, $3.3 million

Strategy	Action Description	Funding Source
Data Access & Literacy	Build and maintain a reliable 9th Grade On-Track data ecosystem by ensuring real-time, valid, disaggregated dashboards are available; partnering with schools to guarantee access and trust in the data; equipping Data Champions to translate information into actionable insights; and coordinating a districtwide reporting calendar so teams can use data predictably in their improvement cycles	General Fund SIA
Team Structures & Processes	Ensure every high school has a functioning 9th Grade Success Team with protected meeting time, clear roles, trained leadership, and administrator engagement, making team structures a guaranteed condition rather than an optional practice.	M98
Intervention Strategies	Provide professional learning and coaching that build educator trust, equity-centered discourse, and reflective practice, ensuring that adults approach students with high expectations and belief in their capacity to succeed. Guarantee access to a core set of effective interventions – including competency-based credit recovery, tutoring, SEL supports, and restorative practices – and ensure they are prioritized for historically underserved students.	General Fund M98
Transition Support	Promote structures that increase belonging and reduce early course failures – such as 9th grade academies, cohort scheduling, student-adult conferencing, and community-building practices – so that every student experiences high school as a supportive entry point. Support the use of incoming 8th grade data to trigger early identification and supports (counseling, academic planning, proactive outreach) so that students at risk of falling off track are engaged before problems compound.	General Fund M98
Instructional Practices	Support adoption of equitable, standards-based grading and monitor failure-rate gaps. Advance equitable grading policies and practices by supporting schools in shifting to standards-based grading and by monitoring reductions in course failure rates and subgroup gaps. Coordinate across departments to strengthen collaborative teacher teams (PLCs) that use high-quality instructional materials, embed literacy practices, and engage in continuous improvement cycles focused on student work and equitable outcomes.	General Fund M98 Title IIA

District-Wide Equity Investment, $17.2 million

Strategy	Action Description	Funding Source
Differentiated Staffing Formula	Apply the equity lens to the PPS staffing formula, allocating additional resources to schools based on student demographics. In 2026-27, 115.8 FTE were allocated to 63 schools.	General Fund

POLICIES AND REGULATIONS

The Budget Process

The budget is developed by incorporating input from the Board of Education, the Superintendent and staff, the public, and information from the State Legislature regarding the funding level of the State School Fund (SSF).

Board Discussion and Community Engagement

During the course of the year the Board held work sessions, committee presentations, and discussions on a number of program topics which included information about budget implications and possibilities.

Local Budget Law

Budgeting in Oregon is governed by Local Budget Law, Chapter 294 of the Oregon Revised Statutes. The law has two major objectives:

- To provide standard procedures for preparing, presenting, and administering local budgets
- To ensure community involvement in the preparation of the budget

Local Budget Law provides a method of estimating revenues, expenditures and proposed taxes for all major funds and offers an approach for outlining the programs and services to be provided by the schools to implement fiscal policies and financial decisions.

The structure of school budgets in the State of Oregon is further defined by the Oregon Department of Education (ODE). ODE, through the administrative rule process, defines the structure of the budget and the classification system to be used; guidance is published in the Program Budgeting and Accounting Manual (see below). The budget forms defined by ODE present the planned Resources and Requirements the District budgets to carry out its educational mission.

Further information on specific requirements for the budget process and budget document may be found at the Tax Supervising Conservation Commission (TSCC) website - http://www.tsccmultco.com/.

Detail on ODE requirements can be found in the Oregon Administrative Rules (OAR), at: https://secure.sos.state.or.us/oard/ruleSearch.action

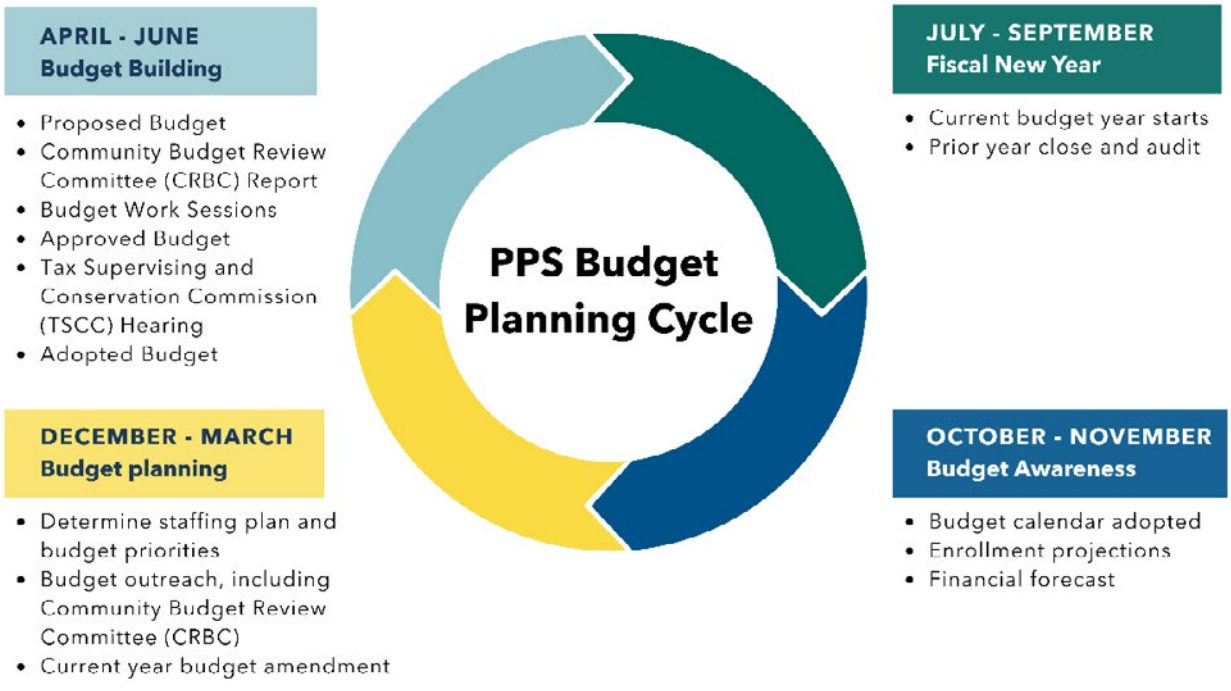
Budgeting is a Continuous Process

Budgeting is a continuous process taking almost 24 months to complete a cycle. The budgeting process has various phases:

- **Proposed Budget** - Staff works to assist the Superintendent and to prepare a proposed budget for the upcoming fiscal year. In addition to staff work, the Superintendent provides regular updates and leads discussions with the Board, as well as listening sessions at public meetings to gather community input. The Proposed Budget is the product of an extensive, collaborative process of budget development, analysis, and revision, which builds upon work done in reviewing programs and developing new plans for delivering services to students and families. The outcome is the Superintendent's Proposed Budget document, also called the Budget Book.
- **Approved Budget** - The Board, sitting as the Budget Committee, reviews and discusses the Proposed Budget. The Budget Committee refines the Proposed Budget and votes to approve a budget and impose property taxes. This stage also involves budget review and input from the

Community Budget Review Committee. This committee performs separate review and analysis of the Proposed Budget and provides recommendations to the Board acting as the Budget Committee. This phase of budget development requires public participation and at least one public hearing. The Approved Budget is passed to the TSCC for its review and certification.

- **Adopted Budget** - The District's Approved Budget is reviewed and certified by the TSCC. Unique to Multnomah County, the TSCC is a five-member board appointed by the Governor that reviews the budgets of all governmental jurisdictions in Multnomah County. The Commission, following standard procedures established by the State Department of Revenue, is responsible for ensuring the District budget complies with local budget law. The TSCC certifies the Approved Budget after review. Successful completion of that action includes a public hearing held by TSCC. The Board further refines the budget prior to final adoption in late June, but no later than June 30. The Board, as a governing body, votes to adopt the Budget, levy taxes and appropriate funds. The outcome is a legally adopted budget published as the Budget Book.
- **Amending the Budget** - Local Budget Law defines procedures and controls on allowed changes to the budget during the fiscal year, commonly referred to as supplemental budgets. In supplemental budgets, the District may increase appropriations within the guidelines defined in Local Budget Law. The size of the increase determines whether a minor or major supplemental budget process is required.
    - A minor supplemental budget process (increase in any fund must be less than ten percent of expenditures) provides the Board the opportunity to change the budget during the year. Minor supplemental budgets are scheduled as needed, usually in the fall or winter, after school begins and staff movement has been finalized, and again in the spring.
    - A major supplemental budget process (any fund increase of ten percent or more of expenditures) occurs as needed. Major supplemental budgets are infrequent and normally timed to coincide with the minor supplemental budget actions. Major supplemental budget actions require a public notice and public hearing.



Budget Methodology

The District seeks to align resources to programs and strategies with proven student outcomes. Additionally, since the PPS Strategic Plan adoption in June 2021, the District has focused on allocating resources to target goals and outcomes in the plan.

Budget Officer and Budget Committee

To ensure participation in the budget process, Local Budget Law requires that a budget officer be appointed and a budget committee consisting of Board members and members of the public be formed. At PPS the budget officer is currently the Chief Financial Officer. For local jurisdictions with greater than 200,000 in population such as PPS, the elected body is the Budget Committee, with no community members. The District's budget officer prepares the Proposed Budget under the direction of the Superintendent. The Budget Committee then reviews, revises, and approves the budget before it is formally adopted by the governing body.

Public notices are published, budgets are made available for public review, and opportunities for public comment are also provided. This structure encourages public participation in the budget decision-making process and gives public exposure to budgeted programs and fiscal policies prior to adoption.

Community Budget Review Committee (CBRC)

The District is not required to have a budget committee composed of community members. However, the Board has established a Community Budget Review Committee (CBRC) composed of several community stakeholders to advise the Board on the budget. The CBRC reviews, evaluates, and makes recommendations to the Board regarding the Superintendent's Proposed Budget and any other budgetary issues the CBRC or the Board identify. The CBRC also monitors and advises the Board on the allocation and expenditure of Local Option Levy funds.

Capital Projects

The District reviews capital projects on a monthly basis both for cash flow and arbitrage consideration within the context of achieving the stated outcomes in the bond's ballot. The PPS Finance Team, Office of School Modernization, Technology and Curriculum teams meet with financial planners for planning future capital needs and subsequent strategy for issuing debt.

The School Board votes on all debt issuance resolutions. The Board is also presented with a Capital Improvement Plan and Long-Range Facility Plans. The information includes which schools are included in the bond projects. Bond Accountability Committee (BAC) meets quarterly to review bond funded projects and offer advice to the School Board.

The Long Range Facility Planning Process

Portland Public Schools' Board of Education accepted the Long-Range Facility Plan in December 2021 after a year of development and engagement with the broader District community. The Long-Range Facility Plan outlines a sequence of planning processes intended to guide future capital measures.

The plan synthesizes three primary considerations:

- Educational program requirements
- Enrollment and capacity
- Facility condition

These considerations are guided by a strategic vision established by the District and informed by input from the broader district community. This work is an opportunity to institute lasting change by re-envisioning teaching and learning environments. The District garnered ideas from diverse communities and developed a representative vision for the future of our schools.

All large school districts in Oregon are required to complete a Long-Range Facility Plan every ten years. The purpose of the document is to plan for future capital improvements within the context of current educational vision and student enrollment trends over the next 10 to 15 years. The plan provides a strategic framework to be tested against community voice and vision prior to future bond campaigns. A Long-Range Facility Plan is intended to provide clear sightlines for the management of Portland Public Schools facilities over time, such that they continually support the ongoing success of district students, staff, and community.

The plan also addresses the requirements of OAR 581-027-0040, Long-Range Facility Plan Requirements, and Section 5 of ORS 195.110, School Facility Plan for Large School Districts. In doing so, this plan creates a framework for future bond-planning efforts, reflects community values, and targets alignment with community capital support.

The Long-Range Facility Plan document falls within a sequence of steps recommended by the state before capital Bond planning. Preceding this document is a multi-year facility condition assessment and enrollment forecasts outlining student population trends for the next fifteen years. Building on these efforts, this plan documents capital forecasts in the context of educational vision, building condition, and building capacity.

Many steps remain before a capital measure can be referred to the voters. It is essential to recognize that the Long-Range Facility Plan document does not make commitments that will require future Board action or make specific recommendations for future bonds. Instead, the Long-Range Facility Plan is intended to provide a framework to be tested against community voice and vision before future capital measures. Access this PPS website for more information: https://www.pps.net/departments/rise/pps-maps-and-facility-data/long-range-facility-plan

Bond Accountability Committee

The Bond Accountability Committee (BAC) is made up of seven to ten members reflective, to the extent possible, of the diversity of Portland. The members shall have a reputation for fairness and transparency and experience in building design, construction, public contracting, budgeting, and/or auditing. The Board will appoint committee members and a chairperson or co-chairpersons.

The committee meets quarterly to review bond funded projects and offer advice to the School Board, on:

A. Whether bond revenues are expended only for the purpose for which the bond was approved
B. Alignment with the goals and principles of the district's Long Range Facilities Plan
C. Alignment with the goals of the Business Equity Policy
D. Lowering maintenance and construction costs while improving operating efficiency
E. Historic preservation and school renovation
F. Potential capital partnerships for joint and shared use of PPS facilities
G. Implementation of appropriate ways to address seismic issues
H. Compliance with ADA requirements

Access this PPS website for more information: https://bond.pps.net/about/oversight-and-accountability/bond-accountability-committee-bac

Board Policies

Board policy 2.10.010-P establishes the Board's requirements for Racial Educational Equity. https://resources.finalsite.net/images/v1752829489/ppsnet/wgkt48nyjx17hjcvuov8/210010-P_1RacialEducationalEquityPolicy.pdf

Board policy 8.10.025-P establishes the Board's requirements for contingencies and reserves. https://resources.finalsite.net/images/v1751565392/ppsnet/hhd7hcuubzwmsgz4cewn/810025-PReserveFunds.pdf

Most notably, the Board has established a goal of maintaining an operating contingency of 5-10%. The goal for the reserve will be set as part of the District's long-range financial plan, with an expectation that the District will achieve and sustain a 10% reserve.

Administrative Directive 8.10.030-AD establishes the guidelines for budget reallocations post adopted budget.

https://resources.finalsite.net/images/v1751565394/ppsnet/mzew5fffsfqfdg0ct1z-k/810030-ADBudgetReallocations-PostBudgetAdoptions.pdf

Budgetary Basis of Accounting

The District reports financial position, results of operations, and changes in fund balance/net position on the basis of Generally Accepted Accounting Principles (GAAP). The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting, as are the proprietary fund financial statements. The budgetary statements provided as part of required or other supplementary information are presented on the budgetary basis to provide a meaningful comparison of actual results with the budget.

BUDGET CALENDAR

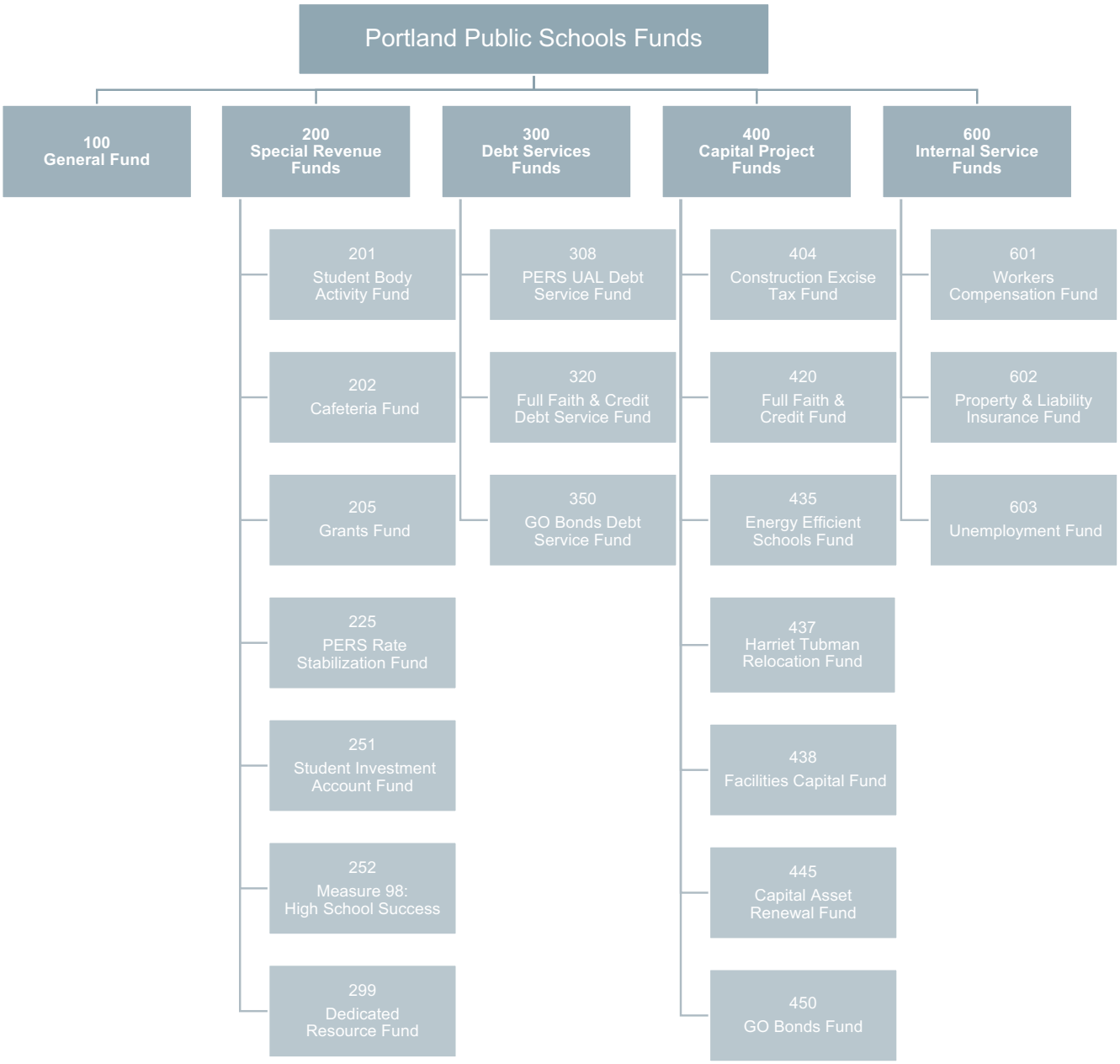
Portland Public Schools
Calendar to Adopt the 2026-27 Budget

Draft Reviewed on October 28, 2025
Adopted on November 4, 2025
Amended on April 14, 2026

			Board Inform / Review	Board Action	
BUDGET PLANNING	**October 28, 2025**	***School Board Meeting*** Board reviews draft 2026-27 Budget Calendar	✔		PEC
	October - December 2025	***Community Engagement***			TBD
	November 4, 2025	***School Board Meeting*** Board adopts 2026-27 Budget Calendar		✔	PEC
	November 18, 2025	***School Board Meeting*** Board appoints Community Budget Review Committee (CBRC) members		✔	PEC
	December 16, 2025	***School Board Budget Work Session*** Establish priorities, budget principles, and policies	✔		PEC
	January - March 2026	***School Board Budget Work Sessions*** Inclusive of budget trainings, CBRC work session, and school staffing	✔		PEC
BUDGET BUILDING	**April 2026**	***Publish 1st Notice of Budget Committee Meeting*** *(5 to 30 days before the meeting)*			The Oregonian Web Site
	April 2026	***Publish 2nd Notice of Budget Committee Meeting*** *(5 to 30 days before the meeting)*			The Oregonian Web Site
	April 28, 2026	***Budget Committee Meeting (School Board Work Session)*** *CBRC in attendance* **Proposed Budget:** Superintendent delivers 2026-27 Proposed Budget message and presentation	✔		PEC
	May 12, 2026	***School Board Meeting*** CBRC presents 2026-27 Proposed Budget Report to the Board Board discussion and feedback focused on the budget	✔		PEC
	May 13, 2026 (updated)	***Budget Committee Meeting and Budget Work Session*** Board conducts a public hearing and work session on the Proposed Budget	✔		Benson High School (updated)
	May 26, 2026	***Budget Committee Meeting*** **Approved Budget**: Board as Budget Committee approves 2026-27 Proposed Budget		✔	PEC
	June 2026	***Publish Notice of Budget Hearing and Budget Summary*** *(5 to 30 days before the meeting)*			The Oregonian Web Site
	June 23, 2026	***TSCC Hearing*** TSCC certifies 2026-27 Approved Budget ***Budget Committee Meeting (School Board Meeting)*** **Adopted Budget:** Board conducts a public hearing, adopts budget, makes appropriations, and imposes taxes	✔	✔	PEC
	July 15, 2026	***Submit Tax Certification documentations*** *File budget information with County Recorder and Designated Agencies*			

PORTLAND PUBLIC SCHOOLS FUND STRUCTURE

The Fund Structure is defined by the Oregon Department of Education (ODE) and is outlined in the Program Budgeting and Accounting Manual (PBAM). The PBAM can be found on ODE's website.



Fund Descriptions and Definitions

Fund Type	Fund Purpose	Budgeted Funds
100 General Fund	The primary day-to-day operating fund of the District.	100 - General Fund
200 Special Revenue Funds	Dedicated revenues such as: Federal, State and Local Grants and Private Donations.	201 - Student Body Activity Fund 202 - Cafeteria Fund 205 - Grants Fund 225 - PERS Rate Stabilization Fund 251 - Student Investment Account Fund 252 - Measure 98: High School Success 299 - Dedicated resource Fund
300 Debt Service Funds	Accounts for the payment of principal and interest on certain long-term debt.	308 - PERS UAL Debt Service Fund 320 - Full Faith & Credit Debt Service Fund 350 - GO Bonds Debt Service Fund
400 Capital Project Funds	Resources and expenditures used to finance acquisition of technology or construction or renovation of capital facilities.	404 - Construction Excise Tax Fund 420 - Full Faith & Credit Funds 435 - Energy Efficient Schools Fund 437 - Harriet Tubman Relocation Fund 438 - Facilities Capital Fund 445 - Capital Asset Renewal Fund 450 - GO Bonds Fund
600 Internal Service Fund	Accounts for services furnished by one department or agency to another department or agency on a cost-reimbursement basis.	601 - Self Insurance Fund 602 - Property & Liability Insurance Fund 603 - Unemployment Fund

CLASSIFICATION OF REVENUES AND EXPENDITURES

Oregon Program Budgeting & Accounting Manual

Pursuant to the Program Budgeting and Accounting Manual (PBAM), PPS classifies revenues by five major sources:

Major Sources

1000 Local Sources
2000 Intermediate Sources
3000 State Sources
4000 Federal Sources
5000 Other Sources

Expenditures are classified by function and object.

Major Functions

1000 Instruction
2000 Support Services
3000 Enterprise and Community Services
4000 Facilities Acquisition and Construction
5000 Other Uses (Interagency/Fund Transactions and Debt Service)
6000 Contingency
7000 Unappropriated Ending Fund Balance

Major Objects

100 Salaries
200 Associated Payroll Costs
300 Purchased Services
400 Supplies and Materials
500 Capital Outlay
600 Other Objects
700 Transfers
800 Other Uses of Funds

	BOARD POLICY **Portland Public Schools** **Racial Educational Equity Policy**	**2.10.010-P**

The Board of Education for Portland Public Schools is committed to the success of every student in each of our schools. The mission of Portland Public Schools is that by the end of elementary, middle, and high school, every student by name will meet or exceed academic standards and will be fully prepared to make productive life decisions. We believe that every student has the potential to achieve, and it is the responsibility of our school district to give each student the opportunity and support to meet his or her highest potential.

In light of this mission and our beliefs, Portland Public Schools' historic, persistent achievement gap between White students and students of color is unacceptable. While efforts have been made to address the inequities between White students and students of color, these efforts have been largely unsuccessful. Recognizing that there are other student groups that have not reached their achievement potential, this policy focuses on the most historically persistent achievement gap, which is that between White students and students of color. Closing this achievement gap while raising achievement for all students is the top priority of the Board of Education, the Superintendent and all district staff. Race must cease to be a predictor of student achievement and success.[1]

In Portland Public Schools, for every year that we have data, White students have clearly outperformed Black, Hispanic and Native American students on state assessments in every subject at every grade level. White students consistently graduate at higher percentages than students of color, while students of color are disciplined far more frequently than White students. These disparities are unacceptable and are directly at odds with our belief that all students can achieve.

The responsibility for the disparities among our young people rests with adults, not the children. We are aware that student achievement data from school districts across the country reveal similar patterns, and that complex societal and historical factors contribute to the inequities our students face. Nonetheless, rather than perpetuating disparities, Portland Public Schools must address and overcome this inequity and institutional racism, providing all students with the support and opportunity to succeed.

[1] For the purposes of this policy, "race" is defined as "A social construct that artificially divides people into distinct groups based on characteristics such as physical appearance (particularly color), ancestral heritage, cultural affiliation, cultural history, ethnic classification, and the social, economic, and political needs of a society at a given period of time. Racial categories subsume ethnic groups." Maurianne Adams, Lee Anne Bell, and Pat Griffin, editors. *Teaching for Diversity and Social Justice: A Sourcebook.* (2007).

	BOARD POLICY **Portland Public Schools** **Racial Educational Equity Policy**	**2.10.010-P**

Portland Public Schools will significantly change its practices in order to achieve and maintain racial equity in education. Educational equity means raising the achievement of all students while (1) narrowing the gaps between the lowest and highest performing students and (2) eliminating the racial predictability and disproportionality of which student groups occupy the highest and lowest achievement categories.[2] The concept of educational equity goes beyond formal equality -- where all students are treated the same -- to fostering a barrier-free environment where all students, regardless of their race, have the opportunity to benefit equally. Educational equity benefits all students, and our entire community. Students of all races shall graduate from PPS ready to succeed in a racially and culturally diverse local, national and global community. To achieve educational equity, PPS will provide additional and differentiated resources to support the success of all students, including students of color.

In order to achieve racial equity for our students, the Board establishes the following goals:

A. The District shall provide every student with equitable access to high quality and culturally relevant instruction, curriculum, support, facilities and other educational resources, even when this means differentiating resources to accomplish this goal.
B. The District shall create multiple pathways to success in order to meet the needs of our diverse students, and shall actively encourage, support and expect high academic achievement for students from all racial groups.
C. The District shall recruit, employ, support and retain racially and linguistically diverse and culturally competent administrative, instructional and support personnel, and shall provide professional development to strengthen employees' knowledge and skills for eliminating racial and ethnic disparities in achievement. Additionally, in alignment with the Oregon Minority Teacher Act, the District shall actively strive to have our teacher and administrator workforce reflect the diversity of our student body.
D. The District shall remedy the practices, including assessment, that lead to the over-representation of students of color in areas such as special education and discipline, and the under-representation in programs such as talented and gifted and Advanced Placement.
E. All staff and students shall be given the opportunity to understand racial identity, and the impact of their own racial identity on themselves and others.

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[2] Glenn Singleton and Curtis Linton *Courageous Conversations About Race*, p. 46 (2006)

	BOARD POLICY **Portland Public Schools** **Racial Educational Equity Policy**	**2.10.010-P**

F. The District shall welcome and empower students and families, including underrepresented families of color (including those whose first language may not be English) as essential partners in their student's education, school planning and District decision-making. The District shall create welcoming environments that reflect and support the racial and ethnic diversity of the student population and community. In addition, the District will include other partners who have demonstrated culturally-specific expertise -- including government agencies, non-profit organizations, businesses, and the community in general -- in meeting our educational outcomes.

The Board will hold the Superintendent and central and school leadership staff accountable for making measurable progress in meeting the goals. Every Portland Public Schools employee is responsible for the success and achievement of all students. The Board recognizes that these are long term goals that require significant work and resources to implement across all schools. As such, the Board directs the Superintendent to develop action plans with clear accountability and metrics, and including prioritizing staffing and budget allocations, which will result in measurable results on a yearly basis towards achieving the above goals. Such action plans shall identify specific staff leads on all key work, and include clear procedures for district schools and staff. The Superintendent will present the Board with a plan to implement goals A through F within three months of adoption of this policy. Thereafter, the Superintendent will report on progress towards these goals at least twice a year, and will provide the Board with updated action plans each year.

References: "The State of Black Oregon" (The Urban League of Portland 2009); "Communities of Color in Multnomah County: An Unsettling Report" (Coalition of Communities of Color/Portland State University 2010); "The Economic Cost of the Achievement Gap" (Chalkboard Project 2010); "The Hispanic/White Achievement Gap in Oregon" (Chalkboard Project 2009); "A Deeper Look at the Black-White Achievement Gap in Multnomah County" (Chalkboard Project 2009); ORS 342.433.

History: Adopted by Resolution No. 4459, 6-13-11

	BOARD POLICY **Contingencies and Reserves**	**8.10.025-P**

1. The Board understands that to avoid financial instability, continuing expenditure requirements should be insulated from typical fluctuations in revenues and expenditures.
2. It is the goal of the Board to fund and maintain a reserve in the general fund that shall range from 5% to 10% of annual general fund revenues. The goals for the reserve will be set as part of the District's long-range financial plan, with an expectation that the District will achieve and sustain a 10% reserve. The Board shall establish an annual operating contingency each fiscal year during the budget process.
3. Contingencies and reserves will be established pursuant to ORS 294.388. Interfund transfers from contingency will be made in accordance with ORS 294.463. The Board may authorize by resolution transfers of contingency funds of up to 15%. Transfers that exceed 15% may be made only after Board approval and adoption of a supplemental budget for that purpose.
4. Reserves generally should not be used for new or increased operating costs or investments. Reserves may be used at the discretion of the Board to address one-time emergencies and unanticipated expenditure requirements or to offset unanticipated revenue fluctuations occurring within a fiscal year. In the event that reserves are expended, there will be a plan to replenish the expended funds within three fiscal years.
5. Reserves are the fund balances carried over from year to year and contingency funds are annually budgeted and reflected in current year fund balances.

Legal References: ORS 294.388, ORS 294.463. History: Adpt. 4/8/02; Rev. 4/19/17; Rev. 6/2019

	BOARD POLICY **Administrative Directive**	**8.10.030-AD**

8.10.030-AD Budget Reallocations – Post Budget Adoption

I. Purpose

This administrative directive establishes the guidelines to assure consistent and detailed communication between the Superintendent and the Board regarding fiscal issues. Communication is essential under circumstances that could result in significant reductions or reallocations of funding after the Board has adopted the budget.

II. General Provisions

The Finance, Audit and Operations Committee will be apprised in a timely manner of significant changes in revenue expectations and cost/expenditure patterns. In particular, the Finance, Audit and Operations Committee will be informed when fiscal circumstances may result in the need for transfers from the contingency fund.

III. Provision of Information to the Board

(1) Budget to Actual Financial Reports and Revenue Reports will be provided to and discussed with the Board Finance, Audit and Operations Committee on a monthly basis.

(2) Specific information regarding budget reductions will be provided to the committee when expenditure adjustments are considered significant. Criteria for judging the significance of a change can include:

(a) Expenditure items or programs that are of priority to or of special interest to Board members as reflected in history of Board and committee meetings;

(b) Expenditure items or program adjustments that exceed $250,000;

(c) Program changes expected to have direct and noticeable student or staff impact;

(d) Any proposed reallocations from the contingency fund.

(3) Upon request or as deemed appropriate, information will be provided to all Board members.

	BOARD POLICY **Administrative Directive**	**8.10.030-AD**

(4) At the option of the Finance, Audit and Operations chair, particular expenditure reductions could be considered 'major' as defined below, triggering a more extensive review and submittal of information to the Board.

IV. Process for Determining Major Expenditure Reductions

Major budget reallocations are defined here as those that exceed .5% of the General Fund Operating Budget.

(1) In the event that major expenditure reductions must be undertaken, the Superintendent will consult with the Finance, Audit and Operations Committee in preparation of recommendations for such reductions.

(2) Subsequent to consultation with the Finance, Audit and Operations Committee, the Superintendent will report to the full Board regarding plans and recommendations for expenditure reductions. The following types of background information will be provided:

(a) Superintendent's recommendations for reductions;

(b) Criteria and policy assumptions that underlie the prioritization of the reductions;

(c) Explanation of the procedure/process used in developing the recommendations for reductions;

(d) Expected consequences/impact of the reduction on services.

(3) The Superintendent will submit the reduction recommendations to the Board for approval by resolution.

V. Contingency Fund Transfers

(1) If the Superintendent recommends a transfer from the Contingency Fund, justification for this transfer will first be presented to the Finance, Audit and Operations Committee for discussion.

(2) After consultation with the Finance, Audit and Operations Committee, the Superintendent will submit the recommendation to the Board for approval by resolution.



Kelly Elementary School - Pre-Kindergarten First Day of School, September 4, 2025



Jefferson High School - Orange Shirt Day, September 25, 2025

FINANCIAL SECTION



FINANCIAL SECTION

The financial section contains required information for the District's funds and descriptions of significant revenue sources and expenditure categories.

Franklin High School - First Day of School, August 27, 2025

FINANCIAL OVERVIEW

The Financial Section details the financial resources and requirements of the District. Resources include revenues from local, state, and federal sources, as well as beginning fund balances. Requirements are the expenditures necessary for operating the district, along with contingencies and ending fund balances. This section contains summaries of assumptions and major shifts; descriptions of funds, programs, and accounts used for budgeting; a high-level overview of all the district's Resources and Requirements; and summaries for each of the funds: General (100), Special Revenue (200), Debt Service (300), Capital Projects (400), and Internal Service (600). The section ends with detailed reports for each of the funds.

Accounts Overview

Resources include revenues from local, state, and federal sources, as well as beginning fund balances, sometimes referred to as reserves. Throughout the details in this document, the words fund, program, and account are referenced to mean the following:

- Funds describe the respective purposes of the resources and are the same for resources and requirements.
- Programs or functions describe how the resources are used and will only be present in the requirements details.
- Accounts or objects describe the source of the resources and the district's intended disposition of those resources.

The following section details the various codes used throughout this document. More information can be found in the Oregon Department of Revenue Local Budgeting Manual https://www.oregon.gov/DOR/forms/FormsPubs/local-budgeting-manual_504-420.pdf and the Oregon Department of Education Program Budgeting and Accounting Manual (PBAM) https://www.oregon.gov/ode/schools-and-districts/grants/Documents/2023%20Program%20Budgeting%20and%20Accounting%20Manual%20(PBAM).pdf.

Account Code Overview

PPS uses an account code structure that is composed of several main elements. While this is very similar to the Oregon Department of Education's (ODE) PBAM, PPS's account codes contain additional digits to capture information not required by the state. The two elements that are presented in different formats are the Object and the Function. These different formats also act as roll-ups aggregating District-level spending into single categories for state reporting.

Object

For PPS, the object code is a six-digit number for revenues and expenditures, while the state object code, which is the corresponding element, is a three-digit number for expenditures and a four-digit number for revenues. In addition, PPS' initial digit clarifies whether it is a revenue or expenditure (revenues begin with 4, expenditures begin with 5).

PPS Object	PPS Description	State Object	State Description
4**1111**1	Current-Multnomah Co	**1111**	Current Year's Property Taxes
4**1111**2	Current-Clackamas Co	**1111**	Current Year's Property Taxes
4**1111**3	Current-Washington Co	**1111**	Current Year's Property Taxes
5**112**10	Classified - Represented	**112**	Classified Salaries
5**112**20	Non-Represented Staff	**112**	Classified Salaries
5**220**00	Social Security - FICA	**220**	Social Security Administration
5**410**00	Consumable Supplies	**410**	Consumable Supplies and Materials

Function
For PPS, the function code is a five-digit number, while the state function code, which is the corresponding element, is a four-digit number. Generally, only the first three digits match as PPS' Function code provides additional details.

PPS Function	PPS Description	State Function	State Description
11111	Elementary K-5 Program	**1111**	Elementary, K-5 or K-6
11119	Kindergarten Homeroom	**1111**	Elementary, K-5 or K-6
12211	Functional Living Skills	**1220**	Restrictive Programs for Students with Disabilities
12261	Home Instruction	**1220**	Restrictive Programs for Students with Disabilities
22402	Instructional Specialists	**2240**	Instructional Staff Development
22410	Instructional Staff Training Services	**2240**	Instructional Staff Development

Fund Classifications
Most school districts are financed through governmental and proprietary funds. PPS's governmental funds include 100, 200, 300, and 400. PPS has one proprietary fund – 600.

100 General Fund
The purpose of the General Fund is to record financial transactions relating to all activities for which specific types of funds are not required. It is the general operating fund for the District.

200 Special Revenue Funds
Special Revenue Funds are set up for specific-purpose grants and other revenues when required by statute, charter provision, or the terms of a grant.

300 Debt Service Funds
Debt Service Funds are used to budget for the payment of principal and interest on all long-term debt.

400 Capital Projects Funds
Capital Project Funds are a type of fund that is used to record the resources and expenditures needed to finance the building or acquisition of capital facilities that are non-recurring major

expenditure items. Resources can include the proceeds from the sale of general obligation bonds, construction excise tax, grants, transfers from other funds, or other revenues authorized for financing capital projects. A capital project fund is normally established when a capital project or series of projects is authorized. It is dissolved when the project is completed. Several related projects financed from one bond issue may be accounted for in one fund if there are no provisions to the contrary in the establishment of the bond issuance.

600 Internal Service Funds
Internal Service Funds finance and account for services furnished by one department or agency to another department or agency of the same local government. Internal Service Fund resources usually come from operating earnings or transfers from other funds.

Resource Accounts (Revenue Sources)

1000 Revenue from Local Sources

1110 Ad Valorem Taxes Levied by District
Taxes levied by a district on the assessed valuation of real and personal property located within the district, which, within legal limits, is the final authority in determining the amount to be raised for school purposes.

1120 Local Option Ad Valorem Taxes Levied by District
Local option taxes levied by a district on the "Tax Gap" valuation of real and personal property located within the district, which, within legal limits, is the final authority in determining the amount to be raised for school purposes.

1130 Construction Excise Tax
Amounts collected as a result of Senate Bill 1036 from the 2007 legislative session, which allows for a construction excise tax.

1190 Penalties and Interest on Taxes
Amounts collected as penalties for the payment of taxes after the due date, and the interest charged on delinquent taxes from the due date to the date of actual payment.

1200 Revenue from Local Governmental Units Other Than Districts
Revenue from the appropriations of another local governmental unit. The district is not the final authority in determining the amount of money to be received, and the money is raised by taxes or other means which are not earmarked for school purposes.

1310 Regular Day School Tuition
Money received as tuition for students attending the regular day schools in the district, including alternative programs entitled to State School Fund support. 1310 is used when instruction and related services are tied directly to the student.

1500 Earnings on Investments
Money received as interest earnings from holdings for savings.

1600 Food Service
Revenue for dispensing food to students and adults.

1700 Extracurricular Activities
Revenue from school-sponsored activities.

1800 Community Services Activities
Revenue from community services activities operated by a district. For example, revenue received from operation of a swimming pool as a community service would be recorded here.

1910 Rentals
Revenue from the rental of either real or personal property owned by the district.

1920 Contributions and Donations from Private Sources
Money received from a philanthropic foundation, private individuals, or private organizations for which no repayment or special service to the contributor is expected. Separate accounts may be maintained for unrestricted revenue and revenue which has restricted use.

1960 Recovery of Prior Years' Expenditure
Refund of expenditure made in a prior fiscal year.

1970 Services Provided Other Funds
Services provided other funds, such as printing or data processing. Generally, this account is only used in Internal Service Funds.

1980 Fees Charged to Grants
Indirect administrative charges assessed to grants.

1990 Miscellaneous
Revenue from local sources not provided for elsewhere.

2000 Revenue from Intermediate Sources

2100 Unrestricted Revenue
Revenue received as grants by the district which can be used for any legal purpose desired by the district without restriction.

2199 Other Intermediate Sources
All other unrestricted intermediate revenue sources not listed in 2100.

2200 Restricted Revenue
Revenue received as grants by the district which must be used for a categorical or specific purpose.

3000 Revenue from State Sources

3101 State School Fund—General Support
State school funding for general operations based on the number and types of students.

3103 Common School Fund
Local revenue generated from state surplus funds, and a component of the State School Funding.

3199 Other Unrestricted Grants-in-aid

3299 Other Restricted Grants-in-aid
This is used for restricted grants in aid from the state.

4000 Revenue from Federal Sources

4100 Unrestricted Revenue Direct from the Federal Government
Revenue direct from the Federal government are grants awarded directly to the district which can be used for any legal purpose desired by the district without restriction.

4200 Unrestricted Revenue from the Federal Government Through the State
Revenues from the federal government passed through the state as grants that can be used for any legal purpose desired by the district without restriction.

4300 Restricted Revenue Direct from the Federal Government
Revenues direct from the federal government as grants awarded directly to the district which must be used for a categorical or specific purpose.

4500 Restricted Revenue from the Federal Government Through the State
Revenues from the federal government passed through the state as grants to the district which must be used for a categorical or specific purpose.

4700 Grants-In-Aid from the Federal Government Through Other Intermediate Agencies
Revenues from the federal government through an intermediate agency.

4801 Federal Forest Fees
Revenue collected in lieu of property taxes for federal lands in the district's county.

5000 Other Sources

5200 Interfund Transfers
Revenue transferred from another fund which will not be repaid.

5300 Sale of or Compensation for Loss of Fixed Assets
Revenue from the sale of school property or compensation for the sale or loss of fixed assets.

5400 Resources–Beginning Fund Balance
The beginning fund balance is the fund balance carryover from the prior year.

Required Programs (Expenditure Functions)

1000 Instruction

1100 Regular Programs
Classroom Instructional activities designed primarily to prepare students for activities as community members, family members, and workers. Regular programs include Pre-kindergarten, Elementary, Middle, and High School.

1200 Special Programs
Instructional activities designed primarily to serve special needs students. The Special Program Service Area includes Talented and Gifted, Children with Disabilities, Disadvantaged Children, English Language Learners, and special programs for other student populations.

1300 Adult/Continuing Education Programs
Learning experiences designed to develop knowledge and skills to meet immediate and long-range educational objectives of adults who, having completed or interrupted formal schooling, have accepted adult roles and responsibilities.

1400 Summer School Programs
Instructional activities as defined under 1100 Regular Programs carried on during the period between the end of the regular school term and the beginning of the next regular school term; this does not include the summer term of a 12-month school year.

2000 Support Services

2100 Support Services—Students
Activities that are designed to assess and improve the well-being of students and/or supplement the teaching process.

2200 Support Services—Instructional Staff
Activities associated with assisting the instructional staff with the content and process of providing learning experiences for students.

2300 Support Services—General Administration
Activities concerned with establishing and administering policy in connection with operating the district.

2400 School Administration
Activities concerned with area-wide supervisory responsibility. This function could include directors of district-wide instructional programs that have administrative responsibilities.

2500 Support Services—Business
Activities concerned with purchasing, paying, transporting, exchanging, and maintaining goods and services for the district. Included are the fiscal, operation and maintenance, transportation, and internal services for operating all schools.

2600 Support Services—Central Activities
Activities, other than general administration, which support each of the other instructional and supporting services programs. These activities include planning, research, development, evaluation, information, staff, statistical, and data processing services.

2700 Supplemental Retirement Program
Costs associated with a supplemental retirement program provided to both current and prior employees by the district.

3000 Enterprise and Community Services

3100 Food Services
Activities concerned with providing food to students and staff in a school or district.

3300 Community Services
Activities that are not directly related to the provision of education for pupils in a district. These include services such as community recreation programs, civic activities, public libraries, programs of custody and care of children, and community welfare activities provided by the district for the community as a whole or in part.

4000 Facilities Acquisition and Construction

4110 Service Area Direction
Activities pertaining to directing and managing facilities acquisition and construction services.

4120 Site Acquisition and Development Services
Activities pertaining to the initial acquisition of sites and improvements thereon.

4150 Building Acquisition, Construction, and Improvement Services
Activities concerned with building acquisition through purchase or construction and building improvements. Initial installation or extension of service systems, other built-in equipment and building additions.

4180 Other Capital Items
Activities concerned with major capital expenditures that are eligible for general obligation bonding, such as textbooks and technology.

4190 Other Facilities Construction Services
Facilities construction activities that cannot be classified above.

5000 Other Uses

5100 Debt Service
The servicing of the debt of a district. Categories of debt service are listed under objects.

5200 Transfers of Funds
These are transactions that withdraw money from one fund and place it in another without recourse.

5300 Apportionment of Funds by ESD or LEA
Apportionment of equalization funds and distribution of other funds by the educational service districts (flow-through dollars from ESDs to districts or other ESDs) or from a Local Education Agency (LEA) acting as the fiscal agent for a grant distributed to other districts.

5400 PERS UAL Bond Lump Sum Payment to PERS
The one-time lump sum payment made to PERS following the issuance of a PERS UAL Bond.

6000 Contingencies (for budget only)
Reserves for expenditures that cannot be foreseen and planned in the budget process because of an occurrence of an unusual or extraordinary event. Use with Object 810 only.

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 the 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. Use with Object 820 only.

Requirement Accounts (Expenditure Objects)

100 Salaries

110 Regular Salaries
Full-time, part-time, and prorated portions of the costs for work performed by employees of the district who are considered to be in positions of a permanent nature.

120 Non-permanent Salaries
Full-time, part-time and prorated portions of the costs for work performed by employees of the district who are hired on a temporary or substitute basis to perform work in positions in either temporary or permanent nature.

130 Additional Salary
Money paid to employees of the district in positions of either a temporary or permanent nature for work performed in addition to the normal work period for which the employee is compensated under Regular Salaries and Temporary Salaries above.

200 Associated Payroll Costs

210 Public Employees Retirement System
District payments to the Public Employees Retirement System.

220 Social Security Administration
Employer's contribution to the Social Security/ Medicare (FICA) for employee retirement.

230 Other Required Payroll Costs
Workers' compensation and unemployment compensation.

240 Contractual Employee Benefits
Amounts paid by the district that are a result of a negotiated agreement between the Board of Directors and the employee groups. Examples of expenditures would be health insurance, long-term disability, and tuition reimbursement.

270 Post-Retirement Health Benefits (PRHB)
Post-retirement Health Benefits are costs of health insurance or health services not included in a pension plan for retirees and their spouses, dependents, and survivors.

300 Purchased Services

310 Instructional, Professional, and Technical Services
Services which by their nature can be performed only by persons with specialized skills and knowledge. Included are the services of medical doctors, lawyers, consultants, and teachers for the instructional area.

320 Property Services
Services purchased to operate, repair, maintain, insure, and rent property owned and/or used by the district. These services are performed by persons other than district employees.

330 Student Transportation Services
Expenditures to persons (not on the district payroll) or agencies for the purpose of transporting children.

340 Travel
Costs for transportation for all district personnel (including students), conference registration, meals, hotel, and other expenses associated with traveling on business for the district.

350 Communication
Services provided by persons or businesses to assist in transmitting and receiving data or information.

360 Charter School Payments
Expenditures to reimburse Charter Schools for services rendered to students.

370 Tuition
Expenditures to reimburse other educational agencies for services rendered to students.

380 Non-instructional Professional and Technical Services
Services which by their nature can be performed only by persons with specialized skills and knowledge.

390 Other General Professional and Technological Services

400 Supplies and Materials

410 Consumable Supplies and Materials
Expenditures for all supplies for the operation of a district, including freight and cartage.

420 Textbooks
Expenditures for prescribed books that are purchased for students or groups of students and resold or furnished free to them.

430 Library Books
Expenditures for regular or incidental purchases of library books available for general use by students, including any reference books, even though such reference books may be used solely in the classroom. Also recorded here are the costs of binding or other repairs to school library books and e-library books.

440 Periodicals
Expenditures for periodicals and newspapers. A periodical is any publication appearing at regular intervals of less than a year and continuing for an indefinite period.

450 Food
Expenditures for food purchases related to 3100 Food Service only. Other food purchases are recorded in object code 410.

460 Non-consumable Items
Expenditures for equipment with a current value of less than $5,000 or for items which are "equipment-like," but which fail one or more of the tests for classification as Object 540 (see 540 definition).

470 Computer Software
Expenditures for published computer software, including licensure and usage fees for software.

480 Computer Hardware
Expenditures for non-capital computer hardware, generally of value not meeting the capital expenditure criterion. An iPad or e-reader needed to access e-textbooks is considered hardware and would be coded here.

500 Capital Outlay

510 Land Acquisition
Expenditures for the purchase of land.

520 Buildings Acquisition
Expenditures for acquiring buildings and additions, either existing or to be constructed, except for bus garages.

530 Improvements Other Than Buildings
Expenditures for the initial and additional improvement of sites and adjacent ways after acquisition by the district.

540 Depreciable Equipment
Expenditures for the initial, additional, and replacement items of equipment, except for buses and capital bus improvements.

550 Depreciable Technology
Expenditures for computer hardware, related equipment, and other capital outlay for technology.

560 Depreciable Transportation
Expenditures for bus garages, buses, and capital bus improvements for student transportation.

590 Other Capital Outlay
Expenditures for all other Capital Outlay not classified above.

600 Other Objects

610 Redemption of Principal
Expenditures which are from current funds to retire bonds, and principal portion of contractual payments for capital acquisitions.

620 Interest
Expenditures from current funds for interest on serial bonds, short-term loans, and interest included in contractual payments for capital acquisitions.

640 Dues and Fees
Expenditures or assessments for membership in professional or other organizations or associations or payments to a paying agent for services rendered.

650 Insurance and Judgments
Insurance to protect school board members and their employees against loss due to accident or neglect.

670 Taxes, Licenses, and Assessments
This includes taxes, licenses, and assessments paid to a government body and penalties assessed for lack of health benefits for eligible employees (Affordable Care Act).

680 PERS UAL Lump Sum Payment to PERS
The one-time lump sum payment made to PERS following the issuance of a PERS UAL Bond.

690 Grant Indirect Charges
Charges made to a grant to recover charges made to administration.

700 Transfers

710 Fund Modifications
This category represents transactions of transferring money from one fund to another.

720 Transits
This category represents transactions that are transit or flow-through means to convey money to the recipient (person or agency).

790 Other Transfers
This category is used for those transfer transactions which cannot be identified in the above classifications.

800 Other Uses of Funds

810 Planned Reserve
Amounts set aside for operating contingencies for expenditures that cannot be foreseen and planned in the budget because of the occurrence of some unusual or extraordinary event.

820 Reserved for Next Year

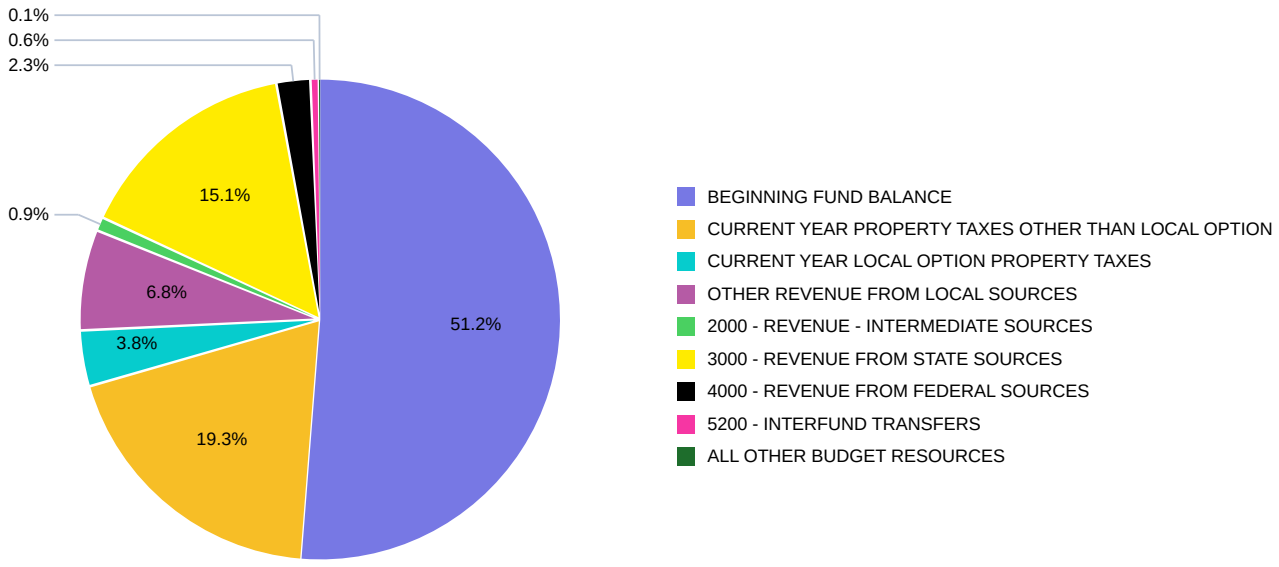
ALL FUNDS RESOURCES

For the fiscal year ending June 30, 2027, the budgeted resources for all funds are $2.77 billion. Major sources of revenue are grants, general obligation bonds, State School Fund, and property taxes. Grants are accounted for in the Special Revenue Fund, and sources include federal Title and Individuals with Disabilities Education Act (IDEA) grants, as well as local and state grants such as the Student Investment Account (SIA) and High School Success (M98). Resources for paying general obligation bonds come from local property taxes, which are accounted for in the Debt Service Fund. Resources from the sale of general obligation bonds are accounted for in the Capital Projects Fund. School district budgeting is governed by Oregon's Local Budget Law.

Summary of Resources by Major Object - All Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
BEGINNING FUND BALANCE	672,720	895,164	624,938	608,455	1,418,834	-	-
CURRENT YEAR PROPERTY TAXES OTHER THAN LOCAL OPTION	456,422	496,282	505,208	531,389	533,562	-	-
CURRENT YEAR LOCAL OPTION PROPERTY TAXES	109,213	106,896	104,123	109,222	103,938	-	-
OTHER REVENUE FROM LOCAL SOURCES	159,803	189,153	173,041	154,291	187,269	-	-
2000 - REVENUE - INTERMEDIATE SOURCES	9,400	7,554	13,391	10,314	25,686	-	-
3000 - REVENUE FROM STATE SOURCES	366,303	364,138	381,597	394,574	417,908	-	-
4000 - REVENUE FROM FEDERAL SOURCES	110,354	108,595	62,967	70,475	63,078	-	-
5200 - INTERFUND TRANSFERS	1,901	1,505	11,262	41,756	15,767	-	-
ALL OTHER BUDGET RESOURCES	465,856	10,415	98,307	114,641	2,550	-	-
Total Resources	**2,351,970**	**2,179,703**	**1,974,836**	**2,035,117**	**2,768,591**	**-**	**-**

Percent of Resources by Major Object - All Funds



ALL FUNDS REQUIREMENTS BY MAJOR FUNCTION

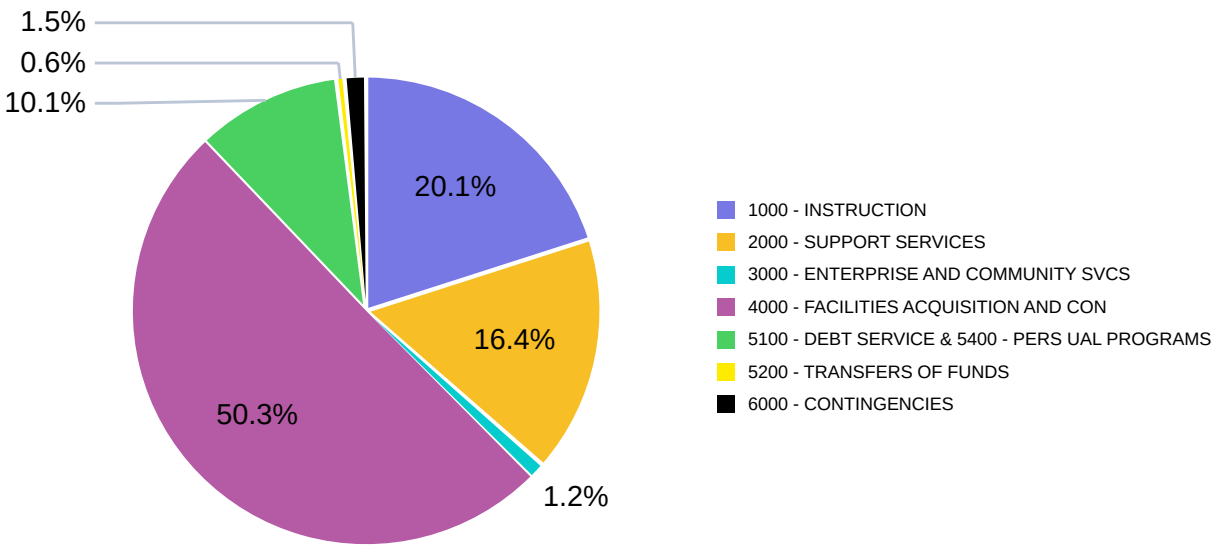
For the fiscal year ending June 30, 2027, the budgeted requirements for all funds are $2.77 billion. Major program requirements include instruction, support services, community services, facilities acquisition, debt service, transfers, contingency, and unappropriated fund balance.

Combined spending on instruction and support services, the District's core operational areas total $1.01 billion. While funding for these areas increased slightly, staffing is reduced by a combined 322.3 FTE, reflecting adjustments to align with enrollment and program needs. The most significant increase is in facilities acquisition and construction, which increases from $639.9 million in 2025-26 to $1.39 billion in 2026-27, which is due to recent debt issuance supporting bond projects.

Summary of Requirements by Major Function - All Funds (in thousands)

Major Function	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
1000 - INSTRUCTION	471,607	500,838	518,964	545,151	**3,260.78**	555,132	-	-	**3,172.11**
2000 - SUPPORT SERVICES	435,964	460,208	453,372	451,464	**2,294.91**	453,173	-	-	**2,089.90**
3000 - ENTERPRISE AND COMMUNITY SVCS	34,878	32,128	32,973	42,469	**233.53**	31,941	-	-	**222.16**
4000 - FACILITIES ACQUISITION AND CON	285,717	309,216	167,498	639,909	**46.25**	1,392,645	-	-	**29.00**
5100 - DEBT SERVICE & 5400 - PERS UAL PROGRAMS	226,739	250,869	259,099	272,690	-	278,876	-	-	-
5200 - TRANSFERS OF FUNDS	1,901	1,505	11,262	41,756	-	15,767	-	-	-
6000 - CONTINGENCIES	-	-	-	41,679	-	41,056	-	-	-
7000 - UNAPPROPRIATED FUND BALANCE	895,164	624,938	531,667	-	-	-	-	-	-
Total Requirements	**2,351,970**	**2,179,703**	**1,974,836**	**2,035,117**	**5,835.46**	**2,768,591**	**-**	**-**	**5,513.16**

Percent of Requirements by Major Function - All Funds



ALL FUNDS REQUIREMENTS BY OBJECT

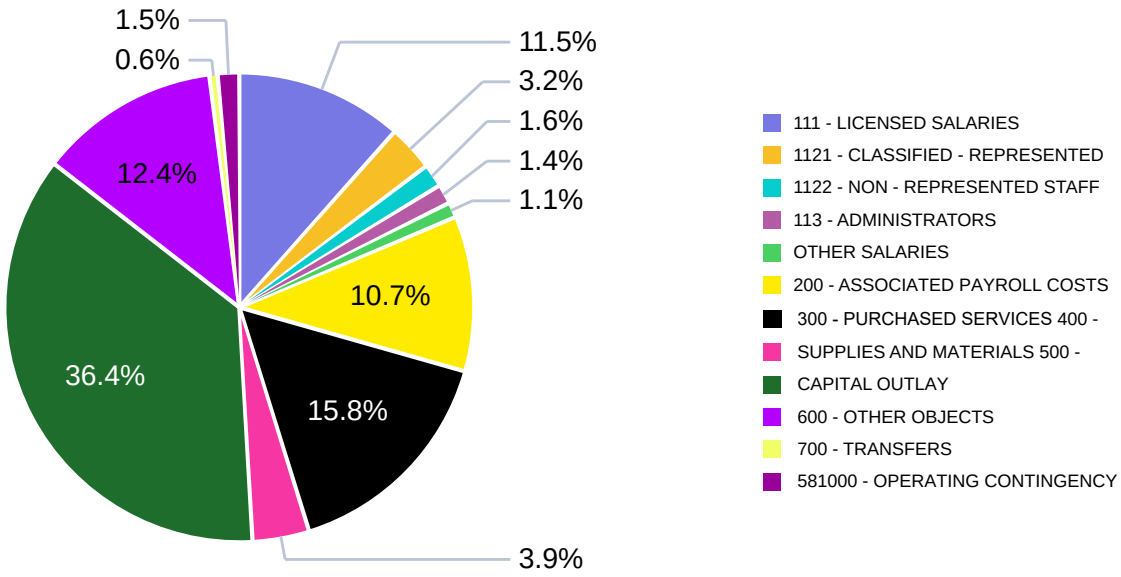
Salaries and associated payroll costs remain one of the District's largest expenditure category within the operating budget. For 2026-27, total staffing for All Funds is projected to decrease by 322.3 FTE. All staffing groups were reviewed as part of a comprehensive realignment effort when determining reductions. These adjustments reflect a strategic restructuring aimed at optimizing support for students and school leaders across the district.

Capital outlay shows the most significant change, increasing 105.8% from $489.7 million in 2025-26 to $1.01 billion, as the District continues make progress on bond-funded capital projects. Supplies and materials increased 74.9%, from $61.9 million to $108.3 million. Purchased services increased 61.9%, from $269.9 million to $437.0 million.

Summary of Requirements by Major Object - All Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
111 - LICENSED SALARIES	295,502	310,693	321,412	324,027	**3,273.27**	318,923	-	-	**3,135.61**
1121 - CLASSIFIED - REPRESENTED	79,049	85,380	87,663	89,881	**1,822.57**	87,963	-	-	**1,760.18**
1122 - NON - REPRESENTED STAFF	46,774	48,867	50,209	51,769	**485.98**	44,089	-	-	**395.68**
113 - ADMINISTRATORS	40,259	42,416	42,880	41,930	**253.65**	37,607	-	-	**221.70**
OTHER SALARIES	39,074	45,305	42,743	17,363	-	29,079	-	-	-
200 - ASSOCIATED PAYROLL COSTS	234,737	254,486	256,389	296,271	-	296,375	-	-	-
300 - PURCHASED SERVICES	174,355	185,976	183,612	269,919	-	436,973	-	-	-
400 - SUPPLIES AND MATERIALS	74,662	57,296	51,796	61,900	-	108,288	-	-	-
500 - CAPITAL OUTLAY	216,049	249,085	107,057	489,669	-	1,007,787	-	-	-
600 - OTHER OBJECTS	254,443	273,755	288,146	308,953	-	344,685	-	-	-
700 - TRANSFERS	1,901	1,505	11,262	41,756	-	15,767	-	-	-
581000 - Operating Contingency	-	-	-	41,679	-	41,056	-	-	-
376520 - Budgeted Ending Fund Balance	895,164	624,938	531,667	-	-	-	-	-	-
Total Requirements	**2,351,970**	**2,179,703**	**1,974,836**	**2,035,117**	**5,835.46**	**2,768,591**	**-**	**-**	**5,513.16**

Percent of Requirements by Major Object - All Funds



All Funds Detail

Resources by Object - All Funds (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	608,455	1,418,834	-	-
377000 - Fund Balance-Unres/Undes	672,720	895,164	624,938	-	-	-	-
Subtotal - Beginning Fund Balance	672,720	895,164	624,938	608,455	1,418,834	-	-
411111 - Current-Multnomah Co	423,117	459,960	468,236	492,958	494,961	-	-
411112 - Current-Clackamas Co	329	353	365	393	404	-	-
411113 - Current-Washington Co	2,766	2,903	2,964	3,177	3,345	-	-
411114 - Current-Mult Co Cancel/Omit	445	698	481	694	694	-	-
411311 - CY Gap Rate Taxes - Mult Co	29,544	32,139	32,926	33,924	33,900	-	-
411312 - CY Gap Rate Taxes - Clack Co	23	25	26	26	28	-	-
411313 - CY Gap Rate Taxes - Wash Co	197	204	210	216	230	-	-
Subtotal - Current Year Property Taxes other than Local Option	456,422	496,282	505,208	531,389	533,562	-	-
411211 - CY Local Option Taxes-Mult Co	108,342	105,991	103,191	108,403	103,000	-	-
411212 - CY Local Option Taxes-Clack Co	93	98	102	92	108	-	-
411213 - CY Local Option Taxes-Wash Co.	778	807	830	726	830	-	-
Subtotal - Current Year Local Option Property Taxes	109,213	106,896	104,123	109,222	103,938	-	-
411121 - Prior-Multnomah Co	2,832	3,219	6,300	3,554	4,000	-	-
411122 - Prior-Clackamas Co	4	3	3	3	3	-	-
411123 - Prior-Washington Co	15	15	12	22	15	-	-
411124 - Prior-Mult Co Cancel/Omit	5	6	7	11	6	-	-
411140 - Pymts In Lieu Of Prop Taxes	546	668	663	450	600	-	-
411170 - Other Property Taxes	2,057	3,332	13	15	15	-	-
411221 - PY Local Option Taxes-Mult Co.	1,081	1,190	1,205	1,361	1,300	-	-
411222 - PY Local Option Taxes-Clack Co	2	1	1	1	1	-	-
411223 - PY Local Option Taxes-Wash Co	6	6	5	7	5	-	-
411231 - Pen/Int-Local Opt Tax-MultCo	169	313	243	45	200	-	-
411232 - Pen/Int-Local Opt Tax-ClackCo	-	-	-	-	-	-	-
411233 - Pen/Int-Local Opt Tax-WashCo	1	1	2	-	-	-	-
411301 - Construct Excise Tax - Cty Ptd	4,187	1,776	1,686	1,500	1,500	-	-
411303 - Construct Excise Tax - Wash Ct	3	10	42	-	-	-	-
411321 - PY Gap Rate Taxes - Mult Co	299	340	665	347	350	-	-
411322 - PY Gap Rate Taxes - Clack Co	-	-	-	-	-	-	-
411323 - PY Gap Rate Taxes - Wash Co	2	2	1	2	2	-	-
411521 - PY GO Bond - Multnomah County	1,386	1,558	2,817	2,094	1,696	-	-
411522 - PY GO Bond - Clackamas County	2	1	1	1	1	-	-
411523 - PY GO Bond - Washington County	7	7	6	10	10	-	-
411901 - Pen/Int-Multnomah Co	757	1,434	1,182	399	550	-	-
411902 - Pen/Int-Clackamas Co	1	1	1	-	-	-	-
411903 - Pen/Int-Washington Co	3	5	7	1	-	-	-
412000 - Rev-Local Gov't Not Districts	705	705	794	622	3,960	-	-
413110 - Regular Day Tuition	316	307	404	-	38	-	-
413111 - Reg Tuition-Evening HS	-	-	-	-	-	-	-
413310 - Summer School Tuition	1	1	1	-	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
415100 - Interest on Investments	28,912	56,177	42,930	21,461	42,186	-	-
416120 - Lunch	2,503	1,956	(49)	60	10	-	-
416201 - A la Carte Sales	-	-	-	-	-	-	-
417110 - Football Admissions	112	77	109	-	120	-	-
417120 - Basketball Admissions	55	55	91	-	84	-	-
417130 - Wrestling Admissions	1	1	3	-	8	-	-
417140 - Other Admissions	9	9	22	-	28	-	-
417410 - Pay to Play Fees	666	785	809	1,000	1,000	-	-
417420 - Other Activity Fees	-	6	-	-	-	-	-
417900 - Other Curricular Activities	5,727	6,308	6,776	6,000	6,000	-	-
419110 - Civic Use of Bldgs	547	606	521	569	600	-	-
419112 - CUB-Day Care	408	404	289	425	500	-	-
419114 - CUB Athletic Field Use Fees	55	190	320	250	300	-	-
419120 - Community Parking Fees	-	-	7	-	-	-	-
419130 - Rent-Lease of Facilities	824	852	978	858	1,000	-	-
419200 - Contrib-Donation - Priv Source	7,294	9,028	6,915	3,769	4,512	-	-
419300 - Rent-Lease Buses/Garage to Con	-	-	28	-	-	-	-
419400 - Svc Provided-Oth Local Ed Agcy	97	143	104	-	200	-	-
419410 - Svc Provided-Oth Dist in State	1,288	1,330	1,673	3,717	3,309	-	-
419600 - Recovery PY Expenditure	921	893	(472)	967	-	-	-
419700 - Services Provided Other Funds	83,547	84,780	85,636	95,875	99,134	-	-
419800 - Fees Charged to Grants	6,948	6,120	4,901	4,940	5,925	-	-
419910 - Miscellaneous	1,444	2,011	2,361	1,573	2,260	-	-
419920 - Jury Duty	1	1	1	1	1	-	-
419930 - Fingerprinting	31	9	(7)	32	32	-	-
419940 - Restitution	4	4	-	3	3	-	-
419941 - Financial Rebates	388	396	372	404	850	-	-
419945 - E-RATE PRIORITY 1	1,165	464	-	-	1,040	-	-
419946 - E-RATE PRIORITY 2	1,197	-	799	-	2,068	-	-
419948 - Utility Refund - PGE	883	975	1,097	1,000	1,000	-	-
419949 - Utility Refund - Pacific Power	322	389	401	400	400	-	-
419950 - Sales, Royalties and Events	51	95	187	297	94	-	-
419965 - Administrative Claiming	7	179	172	241	350	-	-
419970 - Public Records Request	4	4	5	-	3	-	-
Subtotal - Other Revenue from Local Sources	159,803	189,153	173,041	154,291	187,269	-	-
421010 - County School Funds	10	8	6	15	9	-	-
421020 - Ed Service Dist Apportionment	3,500	1,500	7,000	2,000	3,750	-	-
421990 - Other Intermediate Sources	511	499	373	532	632	-	-
421991 - City of Portland	4,955	5,215	5,583	5,300	17,993	-	-
422000 - Restricted Revenue	423	332	429	2,468	3,302	-	-
Subtotal - 2000 - REVENUE - INTERMEDIATE SOURCES	9,400	7,554	13,391	10,314	25,686	-	-
431010 - SSF--General Support	265,671	274,366	268,519	291,053	310,300	-	-
431020 - SSF--School Lunch Match	156	157	-	157	157	-	-
431030 - Common School Fund	6,362	6,415	6,605	6,138	6,800	-	-
431992 - Return To Work	460	422	499	-	-	-	-
432990 - Restricted State Grants	93,655	82,778	105,974	97,226	100,651	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	366,303	364,138	381,597	394,574	417,908	-	-
442000 - Unrestr Rev-Fed Govt Thru St	44	49	88	83	70	-	-

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Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
442020 - Medicaid Reimb. Eligible K12	26	15	136	94	415	-	-
443000 - Restr Rev-Fed Govt Direct	19,188	11,825	9,532	10,429	10,741	-	-
445010 - Fed Reimburse-Breakfast	2,476	2,816	3,503	3,695	4,015	-	-
445020 - Fed Reimburse-Lunch	8,897	8,670	11,468	12,132	12,623	-	-
445030 - Fed Reimburse-Fresh Fruit & Ve	567	399	174	487	493	-	-
445060 - Fed Reimburse - Supper	627	615	-	-	-	-	-
445080 - Fed Grants- State Pass Thru	78,339	84,142	38,028	41,740	32,529	-	-
447000 - Fed Grants-Other Interm Agency	162	44	29	1,800	2,177	-	-
448010 - Federal Forest Fees	21	21	9	15	15	-	-
449100 - Federal Subsidy	7	-	-	-	-	-	-
Subtotal - 4000 - REVENUE FROM FEDERAL SOURCES	110,354	108,595	62,967	70,475	63,078	-	-
452100 - Interfund Transfers	1,901	1,505	11,262	41,756	15,767	-	-
Subtotal - 5200 - INTERFUND TRANSFERS	1,901	1,505	11,262	41,756	15,767	-	-
451100 - Bond Proceeds	420,000	-	79,480	85,000	-	-	-
451200 - Bond Premium	44,832	-	149	-	-	-	-
451600 - Lease Proceeds	958	-	-	-	-	-	-
453000 - Sale of Fixed Assets	66	115	94	20,050	2,550	-	-
453100 - Comp for Loss of Fixed Assets	-	10,300	18,585	9,591	-	-	-
Subtotal - All Other Budget Resources	465,856	10,415	98,307	114,641	2,550	-	-
Total Resources by Object	2,351,970	2,179,703	1,974,836	2,035,117	2,768,591	-	-

Requirements by Function - All Funds (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
1111 - ELEMENTARY K-5	139,351	142,482	141,606	146,917	**924.23**	147,956	-	-	**910.38**
1113 - ELEMENTARY EXTRA CURRICULAR	95	2,032	2,230	186	**-**	894	-	-	**-**
1121 - MIDDLE SCHOOL PROGRAMS	61,408	64,711	68,056	75,299	**448.84**	77,160	-	-	**441.35**
1122 - MIDDLE SCHOOL EXTR CURRICULAR	388	1,461	2,203	1,807	**10.57**	2,596	-	-	**12.43**
1131 - HIGH SCHOOL PROGRAMS	91,272	98,165	99,629	107,583	**634.45**	108,856	-	-	**608.83**
1132 - HIGH SCHOOL EXTRA CURRICULAR	14,943	14,391	14,545	17,178	**9.32**	17,472	-	-	**3.45**
1140 - PRE KINDERGARTEN PROGRAMS	13,387	14,866	13,524	15,357	**139.29**	16,381	-	-	**127.54**
1100 - INSTRUCTIONAL OTHER	13,337	14,269	14,748	(5,920)	**-**	(3,984)	-	-	**-**
1210 - PROGRAMS FOR TALENTED AND GIFTED	401	493	324	407	**-**	355	-	-	**-**
1220 - RESTRICTIVE PROGRAMS	29,955	31,246	33,070	49,425	**368.83**	52,561	-	-	**364.08**
1250 - LESS RESTRICTIVE PROGRAMS	44,740	48,026	53,497	61,850	**480.00**	64,727	-	-	**481.72**
1260 - TREATMENT AND HABILITATION	2,927	3,158	1,446	1,374	**8.00**	1,087	-	-	**6.00**
1271 - REMEDIATION	-	10	10,947	11,241	**72.08**	11,268	-	-	**64.84**
1272 - TITLE I A/D	3,023	2,215	2,103	2,129	**-**	-	-	-	**-**
1280 - ALTERNATIVE EDUCATION	36,750	40,506	37,818	38,725	**35.91**	37,379	-	-	**33.65**
1291 - ENGLISH LANGUAGE LEARNER	12,342	15,065	16,335	17,550	**118.02**	16,596	-	-	**101.39**
1292 - TEEN PARENT PROGRAMS	140	183	132	39	**-**	108	-	-	**-**
1293 - MIGRANT EDUCATION	164	142	126	2	**-**	-	-	-	**-**
1299 - OTHER SPECIAL PROGRAMS	1,599	1,693	1,666	2,391	**11.25**	1,792	-	-	**12.13**
1400 - SUMMER SCHOOL PROGRAMS	5,385	5,724	4,962	1,610	**-**	1,929	-	-	**4.34**
Subtotal - 1000 - INSTRUCTION	471,607	500,838	518,964	545,151	**3,260.78**	555,132	-	-	**3,172.11**
2110 - ATTENDANCE/SOCIAL WORK SVCS	22,890	27,874	25,592	28,501	**225.90**	30,396	-	-	**227.89**

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Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
2120 - GUIDANCE SERVICES	39,031	36,693	37,155	34,382	**203.15**	34,245	-	-	**186.05**
2130 - HEALTH SERVICES PROGRAMS	994	1,484	248	-	**-**	46	-	-	**-**
2140 - PSYCHOLOGICAL SERVICES	7,814	8,890	10,010	10,688	**66.80**	11,907	-	-	**70.54**
2150 - SPEECH PATHOLOGY/AUDIOLOGY SVC	13,001	14,036	16,543	18,336	**113.40**	18,160	-	-	**108.80**
2160 - OTHER STUDENT TREATMENT SVCS	5,181	5,038	5,303	6,036	**35.00**	6,249	-	-	**35.00**
2190 - SVC DIRECTION-STUDENT SUPPORT	29,137	31,410	32,717	32,574	**112.45**	28,960	-	-	**78.54**
2210 - IMPROVEMENT OF INSTRUCTION	13,861	14,302	12,459	14,840	**36.50**	8,457	-	-	**18.00**
2220 - EDUCATIONAL MEDIA SERVICES	14,389	14,303	11,936	12,068	**75.56**	12,028	-	-	**71.02**
2230 - ASSESSMENT AND TESTING	788	548	506	606	**-**	771	-	-	**1.00**
2240 - INSTRUC STAFF DEVELOPMENT	36,656	38,262	34,110	32,892	**126.87**	30,064	-	-	**107.21**
2310 - BOARD OF EDUCATION SERVICES	847	747	948	1,022	**3.00**	950	-	-	**2.00**
2320 - EXECUTIVE ADMINISTRATION SVCS	12,918	17,645	10,269	11,645	**36.75**	10,154	-	-	**30.00**
2410 - OFFICE OF THE PRINCIPAL SVCS	58,517	63,173	62,090	63,388	**416.00**	64,207	-	-	**397.40**
2490 - OTHER SCHOOL SUPPORT ADMIN	554	499	514	508	**-**	508	-	-	**-**
2510 - SUPPORT SERVICES-BUSINESS	440	454	502	548	**2.00**	483	-	-	**2.00**
2520 - FISCAL SERVICES	28,324	27,588	29,671	41,475	**57.00**	36,779	-	-	**45.00**
2540 - OPER/MAINTENANCE OF PLANT SVCS	68,141	72,362	74,873	71,166	**486.15**	72,727	-	-	**443.85**
2550 - STUDENT TRANSPORTATION SERVICE	42,427	47,058	49,385	44,126	**113.00**	48,937	-	-	**114.48**
2570 - INTERNAL SERVICES	4,693	3,433	2,631	2,999	**18.00**	2,180	-	-	**13.00**
2610 - DIRECTION OF CENTRAL SUPPORT	1,182	599	433	588	**2.00**	563	-	-	**2.00**
2620 - RESEARCH,DEVELOP,EVAL SVCS	3,122	3,359	3,538	2,737	**13.50**	2,600	-	-	**8.00**
2630 - INFORMATION SERVICES	3,230	3,569	4,203	4,402	**26.75**	4,512	-	-	**22.13**
2640 - STAFF SERVICES	7,736	8,587	8,607	10,568	**57.13**	9,100	-	-	**45.00**
2660 - TECHNOLOGY SERVICES	19,678	17,916	18,655	17,857	**65.00**	21,717	-	-	**58.00**
2670 - RECORDS MANAGEMENT SVCS	402	379	474	449	**3.00**	455	-	-	**3.00**
2690 - OTHER SUPPORT SERVICES	9	-	3	(12,935)	**-**	(3,982)	-	-	**-**
Subtotal - 2000 - SUPPORT SERVICES	435,964	460,208	453,372	451,464	**2,294.91**	453,173	-	-	**2,089.90**
3100 - FOOD SERVICES	21,729	23,873	24,435	27,797	**192.78**	25,757	-	-	**187.91**
3300 - COMMUNITY SVCS	13,149	8,255	8,538	14,672	**40.75**	6,184	-	-	**34.25**
Subtotal - 3000 - ENTERPRISE AND COMMUNITY SVCS	34,878	32,128	32,973	42,469	**233.53**	31,941	-	-	**222.16**
4110 - Service Area Direction	5,305	6,186	6,506	6,976	**38.00**	5,633	-	-	**29.00**
4150 - Bldg Acquis/Constr/Improv Svcs	244,404	284,181	145,763	614,316	**8.25**	1,293,769	-	-	**-**
4180 - OTHER CAPITAL ITEMS	36,008	18,848	15,230	18,617	**-**	93,243	-	-	**-**
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	285,717	309,216	167,498	639,909	**46.25**	1,392,645	-	-	**29.00**
5100 - DEBT SERVICE	226,739	250,869	259,099	272,690	**-**	278,876	-	-	**-**
Subtotal - 5100 - DEBT SERVICE & 5400 - PERS UAL PROGRAMS	226,739	250,869	259,099	272,690	**-**	278,876	-	-	**-**
52100 - Fund Transfers	1,901	1,505	11,262	41,756	**-**	15,767	-	-	**-**
Subtotal - 5200 - TRANSFERS OF FUNDS	1,901	1,505	11,262	41,756	**-**	15,767	-	-	-
61100 - Operating Contingency	-	-	-	41,679	**-**	41,056	-	-	**-**
Subtotal - 6000 - CONTINGENCIES	-	-	-	41,679	**-**	41,056	-	-	**-**
71100 - Ending Fund Balance	895,164	624,938	531,667	-	**-**	-	-	-	**-**
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	895,164	624,938	531,667	-	**-**	-	-	-	**-**
Total Requirements by Function	2,351,970	2,179,703	1,974,836	2,035,117	**5,835.46**	2,768,591	-	-	**5,513.16**

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Requirements by Object - All Funds (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
511100 - Licensed Staff	295,502	310,693	321,412	324,027	**3,273.27**	318,923	-	-	**3,135.61**
511210 - Classified - Represented	79,049	85,380	87,663	89,881	**1,822.57**	87,963	-	-	**1,760.18**
511220 - Non-Represented Staff	40,834	43,290	45,069	46,050	**450.98**	39,458	-	-	**367.95**
511310 - Administrators - Licensed	38,839	41,190	41,392	40,225	**245.65**	34,938	-	-	**209.70**
511320 - Administrators - NonLicensed	1,420	1,226	1,488	1,704	**8.00**	2,670	-	-	**12.00**
511420 - Directors/Program Admins	5,940	5,577	5,139	5,719	**35.00**	4,631	-	-	**27.73**
512100 - Substitutes - Licensed	13,229	14,446	14,189	10,438	**-**	14,177	-	-	**-**
512200 - Substitutes - Classified	519	708	1,099	1,964	**-**	513	-	-	**-**
512300 - Temporary Misc - Licensed	3,735	4,065	4,185	1,035	**-**	794	-	-	**-**
512400 - Temporary Misc - Classified	1,621	1,841	1,875	252	**-**	362	-	-	**-**
513100 - Extended Responsibility - LIC	3,612	3,391	3,266	2,153	**-**	2,297	-	-	**-**
513200 - Extended Responsibility - CLS	2,132	3,419	3,639	1,228	**-**	2,173	-	-	**-**
513300 - Extended Hours	9,184	11,169	8,566	7,729	**-**	7,564	-	-	**-**
513350 - PAT Overload Pay Stipend	2,656	3,276	3,549	4,158	**-**	6,318	-	-	**-**
513390 - Vacancy Savings	-	-	-	(12,290)	**-**	(6,000)	-	-	**-**
513400 - Overtime Pay	1,931	2,478	1,870	694	**-**	882	-	-	**-**
513510 - Group Hlth Opt Out Lic	367	417	422	3	**-**	-	-	-	**-**
513520 - Group Hlth Opt Out Non Lic	88	96	83	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	500,658	532,662	544,906	524,970	**5,835.46**	517,660	-	-	**5,513.16**
521000 - PERS	53	12	5	22,299	**-**	21,457	-	-	**-**
521310 - PERS UAL	79,678	81,575	84,512	91,253	**-**	96,621	-	-	**-**
522000 - Social Security - FICA	37,790	40,169	41,028	40,161	**-**	39,335	-	-	**-**
523100 - Workers' Compensation	4,056	3,026	(486)	3,610	**-**	2,059	-	-	**-**
523200 - Unemployment Compensation	18	6,090	555	597	**-**	1,932	-	-	**-**
523300 - PFMLA	-	2,267	2,835	2,363	**-**	3,007	-	-	**-**
524100 - Group Health Insurance	108,623	115,935	122,770	130,377	**-**	126,488	-	-	**-**
524200 - Other Employer Paid Benefits	831	965	947	942	**-**	923	-	-	**-**
524300 - Retiree Health Insurance	2,125	2,448	2,265	2,468	**-**	2,417	-	-	**-**
524530 - Early Retirement Benefits	625	950	757	825	**-**	760	-	-	**-**
524510 - PAT Union Tuition Reimbursemnt	586	588	635	875	**-**	875	-	-	**-**
524520 - PAT Union Prof Improvement Fds	351	461	567	500	**-**	500	-	-	**-**
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	234,737	254,486	256,389	296,271	**-**	296,375	-	-	**-**
531100 - Instructional Services	5,886	7,211	6,425	17,313	**-**	17,510	-	-	**-**
531200 - Instr Program Improvement Svcs	4,675	5,517	3,682	4,872	**-**	2,410	-	-	**-**
531300 - Student Services	110	198	739	10,302	**-**	7,169	-	-	**-**
531800 - Local Mtgs/Non-Instr Staff Dev	2,440	1,926	1,268	1,124	**-**	978	-	-	**-**
531810 - Non-Instr Dev Profess Dev Fds	122	98	125	336	**-**	104	-	-	**-**
531900 - Other Instr Prof/Tech Svcs	13,285	7,913	8,728	8,403	**-**	9,456	-	-	**-**
532100 - Cleaning Services	-	41	3	-	**-**	-	-	-	**-**
532200 - Repairs and Maintenance Svcs	3,569	7,002	2,860	1,796	**-**	14,356	-	-	**-**
532400 - Rentals	845	1,310	1,064	497	**-**	478	-	-	**-**
532500 - Electricity	4,675	4,965	5,932	5,373	**-**	7,627	-	-	**-**
532600 - Fuel	4,200	3,753	3,501	4,763	**-**	3,285	-	-	**-**
532700 - Water and Sewage	3,201	3,390	3,992	3,634	**-**	3,634	-	-	**-**

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Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
532800 - Garbage	1,146	1,034	1,076	1,185	-	1,185	-	-	-
532900 - Other Property Services	13,491	10,718	12,240	3,596	-	17,711	-	-	-
533110 - Reimb - School Bus	23,696	28,782	29,716	25,495	-	28,830	-	-	-
533120 - Reimb - Taxi Cab	3,488	2,761	2,516	3,290	-	2,885	-	-	-
533130 - Reimb - In-Lieu	22	12	14	14	-	14	-	-	-
533140 - Reimb - Tri-Met	2,025	2,025	2,034	2,066	-	2,108	-	-	-
533150 - Reimb - Field Trips	1,284	1,578	1,923	1,258	-	1,456	-	-	-
533200 - Non-Reimb Student Transport	2,173	2,128	2,441	911	-	1,466	-	-	-
534100 - Travel, Local in District	586	391	381	484	-	488	-	-	-
534200 - Travel, Out of District	1,806	1,064	1,041	843	-	1,356	-	-	-
534210 - Trav Out Dist Profess Dev Fds	42	54	58	4	-	4	-	-	-
534300 - Travel, Student Activities	752	575	515	800	-	887	-	-	-
534900 - Other Travel	-	-	1	-	-	-	-	-	-
534901 - Student Academic Transport	3	11	7	122	-	31	-	-	-
535100 - Telephone	1,949	1,018	813	530	-	860	-	-	-
535300 - Postage	305	307	100	358	-	378	-	-	-
535400 - Advertising	211	156	128	74	-	541	-	-	-
535500 - Printing and Binding	1,686	1,078	1,435	1,685	-	1,633	-	-	-
535920 - Internet Fees	-	9	37	-	-	-	-	-	-
535990 - Wide Area Network/Misc	999	248	190	2,605	-	2,392	-	-	-
536000 - Charter Schools	18,626	20,435	19,842	19,872	-	19,988	-	-	-
537300 - Tuition to Private Schools	7,731	9,514	9,936	9,898	-	9,410	-	-	-
537410 - Tuition - Fees College Credit	303	650	387	212	-	232	-	-	-
538100 - Audit Services	412	526	539	227	-	1,346	-	-	-
538200 - Legal Services	1,282	1,285	1,595	1,370	-	11,650	-	-	-
538300 - Architect and Engineering Svcs	18,799	22,485	24,124	78,261	-	113,492	-	-	-
538400 - Negotiation Services	116	433	5	140	-	100	-	-	-
538500 - Management Services	3,496	5,111	6,501	37,341	-	111,702	-	-	-
538600 - Data Processing Services	85	-	-	-	-	-	-	-	-
538800 - Election Services	249	74	331	350	-	350	-	-	-
538910 - Security Services	130	318	313	148	-	83	-	-	-
538920 - Staff Services	26	27	33	-	-	-	-	-	-
538930 - Secretarial/Clerical Services	-	16	36	-	-	-	-	-	-
538940 - Professional Moving Services	712	1,221	1,448	163	-	2,529	-	-	-
538950 - Professional Health Care Svcs	180	208	219	2	-	2	-	-	-
538960 - Professional Child Care Svcs	206	201	97	356	-	194	-	-	-
538970 - Graphic Arts Services	119	37	-	7	-	19	-	-	-
538980 - Laundering Services	109	122	166	46	-	124	-	-	-
538990 - Non-Instr Pers/Professional Sv	23,085	25,813	22,831	17,609	-	34,333	-	-	-
538995 - Meal Services	14	144	189	187	-	187	-	-	-
539100 - Pass Through	-	79	33	-	-	-	-	-	-
Subtotal - 300 - PURCHASED SERVICES	174,355	185,976	183,612	269,919	-	436,973	-	-	-
541000 - Consumable Supplies	19,169	19,026	17,041	24,314	-	24,177	-	-	-
541100 - Loss Prevention	-	18	22	-	-	-	-	-	-
541270 - Food Inventory Adjustm-NS Only	(183)	211	125	-	-	-	-	-	-
541310 - Auto Parts, Batteries	162	179	196	-	-	-	-	-	-
541315 - Tires	27	32	38	44	-	30	-	-	-
541320 - Oil & Lubricants	10	11	16	13	-	13	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
541325 - Gas	265	265	211	163	-	168	-	-	-
541330 - Propane	181	157	103	115	-	144	-	-	-
541400 - Maintenance Materials	1,651	1,751	1,822	610	-	1,013	-	-	-
541500 - Inventory Adjustments	1	(17)	(27)	20	-	20	-	-	-
541600 - Interdepartmental Charges	(270)	-	-	176	-	274	-	-	-
542100 - Textbook Expansion	2,517	497	446	524	-	626	-	-	-
542200 - Textbook Adoption	16,152	7,008	4,657	13,921	-	34,819	-	-	-
542300 - Textbook Replacement	-	14	1	-	-	5	-	-	-
543000 - Library Books	1,003	572	312	379	-	397	-	-	-
544000 - Periodicals	11	13	14	5	-	11	-	-	-
544100 - Online Periodical Subscription	141	114	155	112	-	159	-	-	-
545100 - Purchased Food-NS Only	8,254	8,708	9,387	8,986	-	7,595	-	-	-
545300 - Donated Commodity -NS Only	1,768	1,288	1,596	1,491	-	1,596	-	-	-
546000 - Non-Consumable Supplies	2,626	4,128	5,079	933	-	988	-	-	-
546100 - Minor Equipment - Tagged	701	193	668	285	-	228	-	-	-
547000 - Computer Software	7,773	7,835	7,008	3,026	-	24,264	-	-	-
548000 - Computer Equipment	12,702	5,293	2,925	6,782	-	11,762	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	74,662	57,296	51,796	61,900	-	108,288	-	-	-
551000 - Land Acquisition	-	-	-	-	-	396	-	-	-
552000 - Building Acquisition/Improvmnt	201,579	229,134	82,077	488,577	-	949,805	-	-	-
553000 - Improvements - Not Buildings	1,363	12,049	8,893	-	-	16,257	-	-	-
554100 - Initial and Addl Equipment	6,914	4,317	13,889	279	-	18,488	-	-	-
554110 - Vehicles	397	892	216	383	-	530	-	-	-
555010 - Computers	3,751	1,918	479	72	-	9,432	-	-	-
555020 - Printers	958	-	5	-	-	-	-	-	-
555030 - Software Capital Expense	434	453	54	-	-	-	-	-	-
555090 - Misc Other Technology	142	96	46	357	-	12,092	-	-	-
556410 - Buses/Capital Bus Improvements	512	227	1,118	-	-	777	-	-	-
559000 - Other Capital Outlay	-	-	279	-	-	10	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	216,049	249,085	107,057	489,669	-	1,007,787	-	-	-
561000 - Redemption of Principal	148,579	174,015	193,170	212,166	-	185,973	-	-	-
562000 - Interest	19	-	-	-	-	-	-	-	-
562100 - Interest (Except Bus/Garage)	79,350	76,854	65,929	60,552	-	92,931	-	-	-
563000 - Fiscal Charges	228	240	251	110	-	173	-	-	-
563400 - Bad Debt Expense	-	231	401	-	-	-	-	-	-
563500 - Administrative Write-Off	139	7	1	-	-	-	-	-	-
564000 - Dues and Fees	1,570	1,200	1,393	1,011	-	1,810	-	-	-
564010 - Dues & Fees Profess Dev Fds	-	-	-	91	-	91	-	-	-
564100 - Bond Issuance Cost	1,811	-	278	-	-	10,858	-	-	-
565100 - Liability Insurance	1,071	1,237	1,336	7,365	-	7,329	-	-	-
565300 - Property Insurance Premiums	6,028	6,594	6,327	7,093	-	17,860	-	-	-
565350 - Work Comp Insurance Premiums	168	169	193	270	-	270	-	-	-
565500 - Judgmnts&Settlemnts Against	1,434	928	343	380	-	380	-	-	-
565910 - Worker's Comp Claim Expense	2,884	2,144	2,690	3,264	-	2,422	-	-	-
565920 - Worker's Comp Assessment	143	196	197	200	-	200	-	-	-
565930 - Deductible Insurance Loss	1,019	2,277	9,086	5,183	-	5,183	-	-	-
565950 - Unemployment Comp Claim Expense	-	-	-	5,596	-	2,798	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
567100 - Permits	3,044	1,526	444	26	**-**	10,390	-	-	**-**
567200 - Public Assessments	8	16	1,203	-	**-**	-	-	-	**-**
569000 - Grant Indirect Charges	6,948	6,120	4,901	5,646	**-**	6,017	-	-	**-**
Subtotal - Other Objects	254,443	273,755	288,146	308,953	**-**	344,684	-	-	**-**
571000 - Transfers to Other Funds	1,901	1,505	11,262	41,756	**-**	15,767	-	-	**-**
Subtotal - 700 - TRANSFERS	1,901	1,505	11,262	41,756	**-**	15,767	-	-	**-**
581000 - Operating Contingency	-	-	-	41,679	**-**	41,056	-	-	**-**
Subtotal - 581000 - Operating Contingency	-	-	-	41,679	**-**	41,056	-	-	**-**
376520 - Budgeted Ending Fund Balance	895,164	624,938	531,667	-	**-**	-	-	-	**-**
Subtotal - 376520 - Budgeted Ending Fund Balance	895,164	624,938	531,667	-	**-**	-	-	-	**-**
Total Requirements by Object	2,351,970	2,179,703	1,974,836	2,035,117	**5,835.46**	2,768,591	-	-	**5,513.16**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

INTERFUND TRANSFER SCHEDULE

Interfund transfers represent the movement of monies from one fund to another within PPS. The fund transfers may pay for specific services such as transfers to debt service funds for payment of principal and interest; or to fund other operational requirements of the District.

Fund Transfers 2026-27

Source Fund	Transfer Out	Destination Fund	Transfer In	Purpose
101 General Fund	(14,700,000)	602 Property & Liability Insurance	14,700,000	Property and liability insurance payments
101 General Fund	(393,716)	225 PERS Rate Stabilization Fund	393,716	Offset increasing PERS rates
101 General Fund	(35,000)	202 Cafeteria Fund	35,000	Supplemental funding for nutrition programs
101 General Fund	(20,000)	205 Grants fund	20,000	PPS-funded sustainability projects for schools not eligible for PCEF awards
404 Construction Excise	(618,253)	320 Full Faith and Credit Debt Service Fund	618,253	Debt service principal and interest payments
Total Transfers	**$ (15,766,969)**		**$ 15,766,969**	

VARIANCE BY MAJOR FUNCTION

The following chart summarizes variances from 2025-26 to 2026-27. The parameters for General Fund variance were 10% or $1 million variance. All other funds list variances for each major function.

100 - General Fund

Minor Function	Function Description	Adopted 2025-26	Proposed 2026-27	Variance	Description
1113	Elementary Extracurricular	185,898	106,260	-79,638	Reflects staffing adjustments as a result of declining enrollment.
1121	Middle/Junior High School Programs	73,506,782	75,827,622	2,320,840	Reflects a transition to a proportionate methodology for applying vacancy savings and overages across school level minor functions. This technical alignment, combined with rising mandated compensation costs, is partially offset by staffing adjustments made under our strategy for declining resources.
1122	Middle/Junior High School Extracurricular	1,802,301	2,072,748	270,447	Reflects investment in licensed staff and extended responsibilities to support middle school activities.
1210	Programs for the Talented and Gifted	406,670	354,528	-52,142	A technical adjustment to align the budget with actual historical spending trends and student participation.
1220	Restrictive Programs for Students with Disabilities	37,220,797	38,898,725	1,677,928	Represents a continued investment in specialized staffing to sustain vital, mandated supports for students with disabilities.
1250	Less Restrictive Programs for Students with Disabilities	43,175,479	40,135,907	-3,039,572	Aligns with our strategy to optimize staffing for declining resources by leveraging Student Investment Account (SIA) and other grants to sustain service levels.
1260	Treatment and Habilitation	1,068,416	772,673	-295,743	Reflects a calibration of resources based on specific projected student needs for the upcoming year.
1271	Remediation	1,606,901	2,028,974	422,073	Reflects a calibration of resources based on specific projected student needs for the upcoming year.
1280	Alternative Education	32,168,032	30,807,318	-1,360,714	Reflects a decrease in charter school allocations following anticipated lower student membership counts.
1291	English Language Learner	17,064,688	15,449,530	-1,615,158	Reflects a realignment of staff and associated costs to account for declining resources and year-to-year enrollment trends.
1292	Teen Parent Programs	39,368	62,368	23,000	A targeted adjustment to ensure program resources meet specific projected student needs.
1000	**Instructional Major Function Total**	**208,245,332**	**206,516,653**	**-1,728,679**	
2120	Guidance Services	29,692,545	27,356,249	-2,336,296	Reflects staffing adjustments aligned with our strategy for declining resources, including a shift in school-level discretionary selections and updated staffing allocation models. Additionally, a portion of counseling services is supported by Student Investment Account (SIA) funding.
2190	Service Direction, Student Support Services	16,766,390	11,906,959	-4,859,431	Savings achieved through a comprehensive restructuring of central office support services and staffing adjustments as a result of declining enrollment.
2210	Improvement of Instruction Services	10,235,154	6,395,824	-3,839,330	Savings achieved through a comprehensive restructuring of central office support services, optimizing staffing for declining resources and streamlining programs.
2230	Assessment and Testing	606,150	770,582	164,432	Reflects a technical accounting alignment to group similar functions together. A testing coordinator position was moved to this function code to better reflect the specific work of Measurement & Assessment within the department.
2320	Executive Administration Services	10,778,607	9,559,817	-1,218,790	Reflects a strategic reduction in central administrative overhead and staffing to prioritize classroom-level resources.
2510	Direction of Business Support Services	547,500	482,914	-64,586	Achieved through operational streamlining and the shift of eligible modernization oversight to the capital bond fund.
2520	Fiscal Services	9,394,030	8,117,056	-1,276,974	Focuses on long-term fiscal health through the rightsizing of workforce levels to align with current resource projections.
2540	Operation and Maintenance of Plant Services	71,157,103	72,437,027	1,279,924	Adjusts facility maintenance budgets to reflect actual expected utility and service costs following a period of instability.
2550	Student Transportation Services	44,125,736	47,647,560	3,521,824	Normalizes transportation costs to meet current market projections and actual service delivery requirements.
2570	Internal Services	2,999,098	2,179,850	-819,248	Reflects streamlined operations and personnel reductions reached through strategic planning for resource shifts.
2640	Staff Services	10,564,273	8,891,686	-1,672,587	Efficiency-focused restructuring led to a workforce reduction and tighter controls on non-essential expenditures.
2660	Technology Services	14,695,193	13,689,213	-1,005,980	Adjusts the workforce structure while aligning technology expenditures with actual, essential operational costs.
2000	**Support Services Major Function Total**	**221,561,779**	**209,434,737**	**-12,127,042**	
3300	Community Services	4,617,235	2,391,114	-2,226,121	Reflects a strategic workforce restructuring, and a reduction in RESJ community partnerships, while utilizing specialized grant funds to support remaining RESJ community partnerships.
3000	**Enterprise and Community Services Major Function Total**	**4,617,235**	**2,391,114**	**-2,226,121**	
5200	Transfers of Funds	17,175,593	14,755,000	-2,420,593	Reflects a reduction in the need for inter-fund transfers, specifically due to the improved financial independence of Nutrition Services and a pause in Asset Renewal transfers.
5000	**Other Uses Total**	**17,175,593**	**14,755,000**	**-2,420,593**	

200 - Special Revenue Fund

Minor Function	Function Description	Adopted 2025-26	Proposed 2026-27	Variance	Description
1000	Instruction	86,733,425	96,244,503	9,511,078	Reflects an increase in student-focused grant funding and a transition to more precise budgeting models to ensure resources reach the classroom directly.
2000	Support Services	77,508,837	85,490,922	7,982,085	Represents a technical shift in how we categorize Racial Equity and Social Justice (RESJ) contracts and various grant-funded support programs to better align with service delivery.
3000	Enterprise And Community Services	63,573,727	56,045,884	-7,527,843	Primary drivers include a $1.5M reduction in Food Services costs and the relocation of RESJ contracts to the Support Services category for better alignment with service delivery.
4000	Facilities Acquisition And Construction	50,000	12,256,164	12,206,164	This significant percentage increase is due to a technical accounting move, shifting Portland Clean Energy Fund (PCEF) grant-funded capital projects into this fund to improve tracking and transparency.
5000	Other Uses	25,577,051	448,716	-25,128,335	Reflects the strategic use of our PERS (Public Employees Retirement System) reserve funds in fiscal year 2025-26 to offset rising retirement costs, protecting the General Fund for classroom use.

300 - Debt Service Fund

Minor Function	Function Description	Adopted 2025-26	Proposed 2026-27	Variance	Description
5000	Other Uses	272,689,626	278,876,147	6,186,521	Reflects a scheduled increase in debt service payments resulting from the issuance of voter-approved bonds to fund school modernization and facilities improvements.

400 - Capital Projects Fund

Minor Function	Function Description	Adopted 2025-26	Proposed 2026-27	Variance	Description
2000	Support Services	1,994,808	1,501,462	-493,346	Reflects a reduction in staffing levels (FTE) as specific project milestones are reached and administrative functions are streamlined for greater efficiency.
3000	Enterprise And Community Services	1,300,583	-	-1,300,583	Represents the technical relocation of Portland Clean Energy Fund (PCEF) grants to Fund 205 to better align with grant reporting requirements.
4000	Facilities Acquisition And Construction	639,859,229	1,380,388,108	740,528,879	Reflects a scheduled increase in Bond issuance to fund major construction projects, partially offset by the relocation of PCEF grant funds to Fund 205.

600 - Internal Service Fund

Minor Function	Function Description	Adopted 2025-26	Proposed 2026-27	Variance	Description
2000	Support Services	24,768,660	21,159,167	-3,609,493	Reflects a realignment of unemployment insurance budgets to match actual historical costs and adjustments related to overall staffing changes.
6000	Contingencies	500,000	-	-500,000	Represents the intentional move of "emergency" funds into specific departmental budgets to more accurately track where dollars are being spent.

VARIANCE BY MAJOR OBJECT

General Fund

Major Object	Object Description	Adopted 2025-26	Proposed 2026-27	Variance	Description
510000	Salaries	442,948,642	435,263,834	-7,684,808	Reflects staffing adjustments made in response to declining student enrollment and a strategic restructuring of central office departments to prioritize direct support for schools.
520000	Associated Payroll Costs	248,506,949	245,250,832	-3,256,117	Directly tied to staffing adjustments; as the total number of positions are reduced, the associated benefit and tax obligations decrease accordingly.
530000	Purchased Services	104,834,914	110,671,644	5,836,730	Represents a necessary alignment of the budget with the actual cost of essential services to ensure operational stability.
540000	Supplies & Materials	11,674,042	12,736,152	1,062,110	Primarily driven by updated software licensing costs and technology needs, adjusted to reflect actual spending trends required to support core operations.
550000	Capital Outlay	911,932	1,046,868	134,936	Accounts for modest increases in the cost of equipment and specialized tools, adjusted for current market pricing and equipment replacement cycles.
570000	Transfers	17,175,593	14,755,000	-2,420,593	Reflects a reduction in the need for interfund transfers, specifically due to the improved financial independence of Nutrition Services and a pause in Asset Renewal transfers.

GENERAL FUND SUMMARY (100)

The General Fund is unrestricted and includes all District activities that are supported by the State School Fund including property taxes as well as other non-dedicated revenues. The General Fund's resources are available to the District for any purpose provided they are expended or transferred according to resolution or policy. This fund is considered a Major Governmental Fund and is accounted for using the modified accrual method of accounting.

The Board and District intend to continue to maintain required reserves in future years by making additional expenditure reductions as needed.

The major revenue sources are shown in the budget detail section of this document. The detail sections present resources by object code.

Fund requirements are presented in two separate tables affording different views of the budget. The first view is by Function and the second is by Object, both as defined in the State Program Budgeting and Accounting Manual for School Districts and Education Service Districts in Oregon.

Fund 100 - General Fund Resources Summary

The 2026-27 resources include property taxes, local option property taxes, local, intermediate, state, interfund transfers and other sources. The primary sources of revenue for the General Fund are Local Sources (property taxes) totaling $358.2 million or 41.6%, State Sources totaling $317.1 million or 36.8%, and Local Option Property Taxes totaling $103.9 million or 12.1% of all sources. The General Fund's beginning fund balance for 2026-27 is estimated at $41.0 million.

Fund 100 - General Fund Requirements Summary

Salaries and associated payrolls costs are the largest budget categories at $680.5 million, or 78.9% of the General Fund. Purchased services, which include non-staff instructional support, non-staff maintenance activities, and staff development services, account for 12.8%. Supplies, capital outlay, transfers and contingency account for the remaining 8.2%.

Budgeted expenditures are slightly lower due to district-wide budget reductions and meet the minimum 5% contingency requirement of $41.1 million.

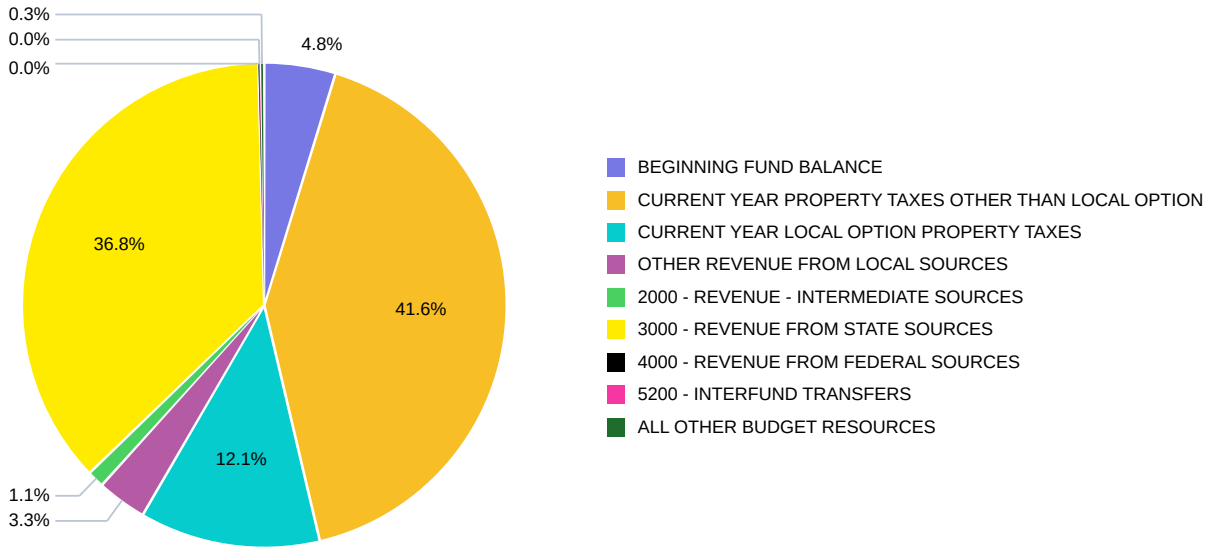
Programming

Most of the work to support strong schools and effective practices at Portland Public Schools (PPS) is funded by the General Fund. Through our staffing process, PPS continues to provide extra support to schools that serve the highest number of historically under-served students. In addition, the General Fund supports progress toward district-wide goals, including the District Continuous Improvement Plan and other important initiatives.

Summary of Resources by Major Object 100 - General Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
BEGINNING FUND BALANCE	98,804	105,497	86,078	45,000	41,000	-	-
CURRENT YEAR PROPERTY TAXES OTHER THAN LOCAL OPTION	311,938	339,436	347,524	359,464	358,223	-	-
CURRENT YEAR LOCAL OPTION PROPERTY TAXES	109,213	106,896	104,123	109,222	103,938	-	-
OTHER REVENUE FROM LOCAL SOURCES	28,028	33,399	30,018	25,831	28,701	-	-
2000 - REVENUE - INTERMEDIATE SOURCES	8,977	7,222	12,727	7,847	9,791	-	-
3000 - REVENUE FROM STATE SOURCES	272,033	280,781	275,124	297,191	317,100	-	-
4000 - REVENUE FROM FEDERAL SOURCES	21	28	146	15	415	-	-
5200 - INTERFUND TRANSFERS	-	-	-	23,962	394	-	-
ALL OTHER BUDGET RESOURCES	1,024	115	94	50	2,550	-	-
Total Resources	**830,038**	**873,375**	**855,834**	**868,580**	**862,112**	**-**	**-**

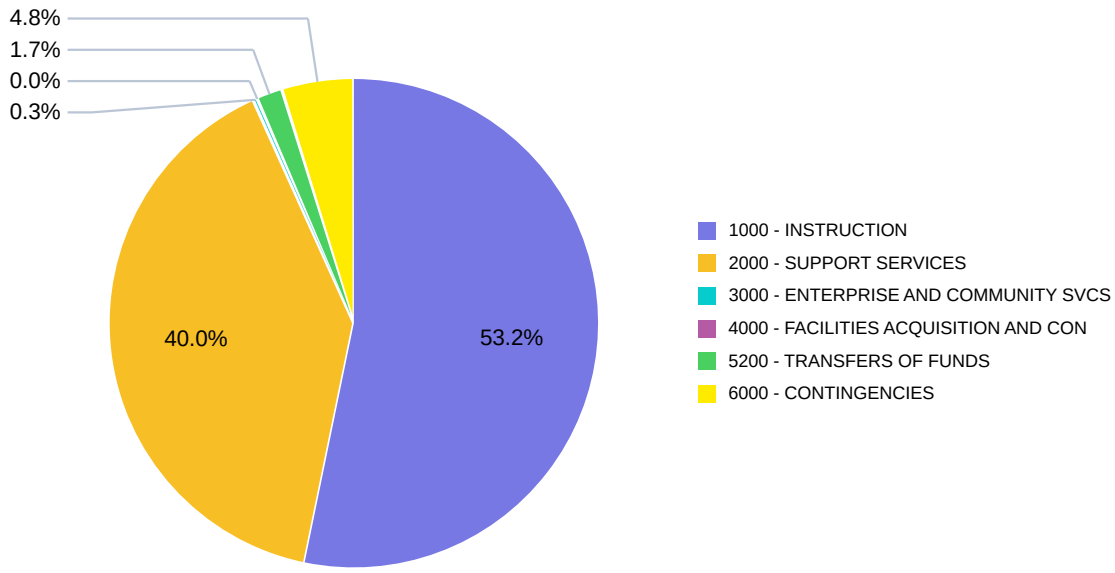
Percent of Resources by Major Object 100 - General Funds



Summary of Requirements by Major Function 100 - General Funds (in thousands)

Major Function	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
1000 - INSTRUCTION	376,786	411,711	439,231	458,417	**2,817.71**	458,888	-	-	**2,675.93**
2000 - SUPPORT SERVICES	343,359	370,577	356,910	347,191	**1,982.05**	345,021	-	-	**1,793.16**
3000 - ENTERPRISE AND COMMUNITY SVCS	3,114	4,123	4,727	4,617	**17.75**	2,391	-	-	**12.25**
4000 - FACILITIES ACQUISITION AND CON	-	-	-	-	**-**	1	-	-	**-**
5200 - TRANSFERS OF FUNDS	1,282	887	10,643	17,176	**-**	14,755	-	-	**-**
6000 - CONTINGENCIES	-	-	-	41,179	**-**	41,056	-	-	**-**
7000 - UNAPPROPRIATED FUND BALANCE	105,497	86,078	44,323	-	**-**	-	-	-	**-**
Total Requirements	**830,038**	**873,375**	**855,834**	**868,580**	**4,817.50**	**862,112**	**-**	**-**	**4,481.34**

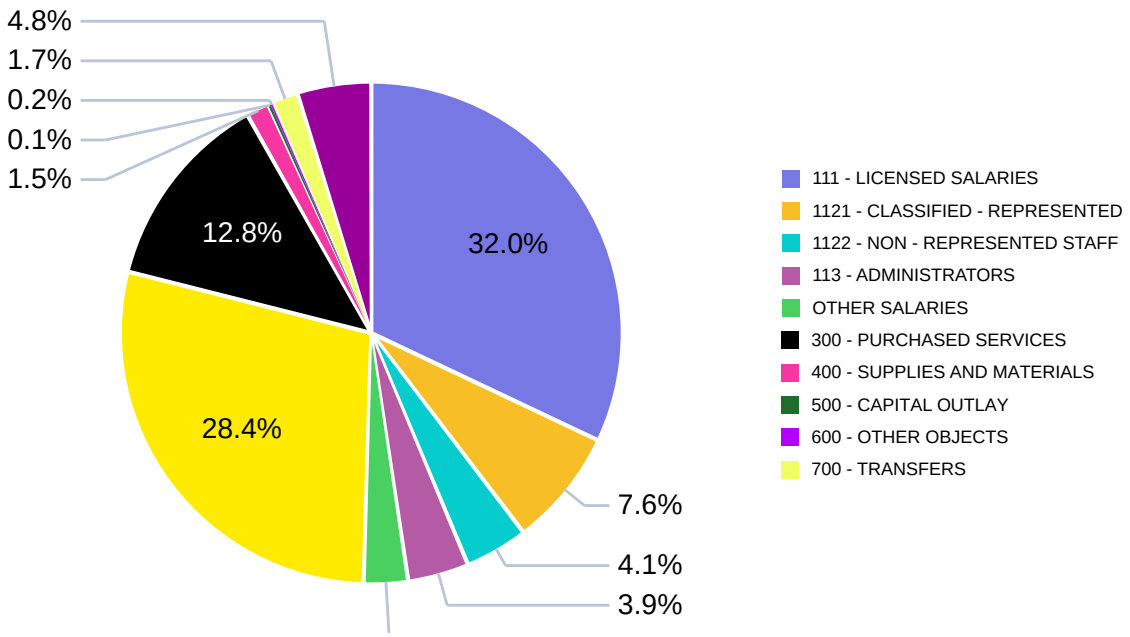
Percent of Requirements by Major Function 100 - General Funds



Summary of Requirements by Major Object 100 - General Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
111 - LICENSED SALARIES	245,309	260,283	274,755	280,529	**2,840.89**	276,175	-	-	**2,718.10**
1121 - CLASSIFIED - REPRESENTED	58,986	64,252	66,903	69,907	**1,375.89**	65,416	-	-	**1,255.72**
1122 - NON - REPRESENTED STAFF	34,823	36,772	38,493	39,886	**367.53**	35,185	-	-	**307.62**
113 - ADMINISTRATORS	34,163	37,512	38,979	38,740	**233.20**	33,957	-	-	**199.90**
OTHER SALARIES	28,478	33,157	33,916	13,887	-	24,531	-	-	-
200 - ASSOCIATED PAYROLL COSTS	188,552	206,210	212,696	248,507	-	245,251	-	-	-
300 - PURCHASED SERVICES	106,798	119,699	117,095	104,835	-	110,672	-	-	-
400 - SUPPLIES AND MATERIALS	14,633	16,856	14,878	11,674	-	12,736	-	-	-
500 - CAPITAL OUTLAY	3,207	1,829	938	912	-	1,047	-	-	-
600 - OTHER OBJECTS	8,311	9,839	2,214	1,349	-	1,332	-	-	-
700 - TRANSFERS	1,282	887	10,643	17,176	-	14,755	-	-	-
581000 - Operating Contingency	-	-	-	41,179	-	41,056	-	-	-
376520 - Budgeted Ending Fund Balance	105,497	86,078	44,323	-	-	-	-	-	-
Total Requirements	**830,038**	**873,375**	**855,834**	**868,580**	**4,817.50**	**862,112**	**-**	**-**	**4,481.34**

Percent of Requirements by Major Object 100 - General Funds



Fund 100 - General Fund Detail

Resources by Object - 100 - General Funds (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	45,000	41,000	-	-
377000 - Fund Balance-Unres/Undes	98,804	105,497	86,078	-	-	-	-
Subtotal - Beginning Fund Balance	98,804	105,497	86,078	45,000	41,000	-	-
411111 - Current-Multnomah Co	279,675	304,236	311,684	322,340	320,947	-	-
411112 - Current-Clackamas Co	222	235	245	254	265	-	-
411113 - Current-Washington Co	1,865	1,934	1,989	2,045	2,198	-	-
411114 - Current-Mult Co Cancel/Omit	445	698	481	694	694	-	-
411311 - CY Gap Rate Taxes - Mult Co	29,512	32,104	32,890	33,889	33,863	-	-
411312 - CY Gap Rate Taxes - Clack Co	23	25	26	26	28	-	-
411313 - CY Gap Rate Taxes - Wash Co	197	204	210	216	230	-	-
Subtotal - Current Year Property Taxes other than Local Option	311,938	339,436	347,524	359,464	358,223	-	-
411211 - CY Local Option Taxes-Mult Co	108,342	105,991	103,191	108,403	103,000	-	-
411212 - CY Local Option Taxes-Clack Co	93	98	102	92	108	-	-
411213 - CY Local Option Taxes-Wash Co.	778	807	830	726	830	-	-
Subtotal - Current Year Local Option Property Taxes	109,213	106,896	104,123	109,222	103,938	-	-
411121 - Prior-Multnomah Co	2,832	3,219	6,300	3,554	4,000	-	-
411122 - Prior-Clackamas Co	4	3	3	3	3	-	-
411123 - Prior-Washington Co	15	15	12	22	15	-	-
411124 - Prior-Mult Co Cancel/Omit	5	6	7	11	6	-	-
411140 - Pymts In Lieu Of Prop Taxes	546	668	663	450	600	-	-
411170 - Other Property Taxes	2,057	3,332	13	15	15	-	-
411221 - PY Local Option Taxes-Mult Co.	1,081	1,190	1,205	1,361	1,300	-	-
411222 - PY Local Option Taxes-Clack Co	2	1	1	1	1	-	-
411223 - PY Local Option Taxes-Wash Co	6	6	5	7	5	-	-
411231 - Pen/Int-Local Opt Tax-MultCo	169	313	243	45	200	-	-
411232 - Pen/Int-Local Opt Tax-ClackCo	-	-	-	-	-	-	-
411233 - Pen/Int-Local Opt Tax-WashCo	1	1	2	-	-	-	-
411321 - PY Gap Rate Taxes - Mult Co	299	340	665	347	350	-	-
411322 - PY Gap Rate Taxes - Clack Co	-	-	-	-	-	-	-
411323 - PY Gap Rate Taxes - Wash Co	2	2	1	2	2	-	-
411521 - PY GO Bond - Multnomah County	1	1	2	-	2	-	-
411522 - PY GO Bond - Clackamas County	-	-	-	-	-	-	-
411523 - PY GO Bond - Washington County	-	-	-	-	-	-	-
411901 - Pen/Int-Multnomah Co	520	984	814	350	500	-	-
411902 - Pen/Int-Clackamas Co	1	1	1	-	-	-	-
411903 - Pen/Int-Washington Co	2	3	5	-	-	-	-
412000 - Rev-Local Gov't Not Districts	10	6	6	-	-	-	-
413110 - Regular Day Tuition	1	14	38	-	38	-	-
413111 - Reg Tuition-Evening HS	-	-	-	-	-	-	-
415100 - Interest on Investments	8,367	11,687	10,443	9,000	9,500	-	-
416201 - A la Carte Sales	-	-	-	-	-	-	-
417110 - Football Admissions	112	77	109	-	120	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
417120 - Basketball Admissions	55	55	91	-	84	-	-
417130 - Wrestling Admissions	1	1	3	-	8	-	-
417140 - Other Admissions	9	9	22	-	28	-	-
417410 - Pay to Play Fees	666	785	809	1,000	1,000	-	-
417420 - Other Activity Fees	-	6	-	-	-	-	-
417900 - Other Curricular Activities	-	-	2	-	-	-	-
419110 - Civic Use of Bldgs	547	606	521	569	600	-	-
419112 - CUB-Day Care	408	404	289	425	500	-	-
419130 - Rent-Lease of Facilities	824	852	978	858	1,000	-	-
419200 - Contrib-Donation - Priv Source	4	14	11	4	7	-	-
419600 - Recovery PY Expenditure	929	903	(521)	967	-	-	-
419800 - Fees Charged to Grants	6,948	6,120	4,902	4,940	5,925	-	-
419910 - Miscellaneous	1,166	1,177	1,818	1,213	1,650	-	-
419920 - Jury Duty	1	1	1	1	1	-	-
419930 - Fingerprinting	31	9	(7)	32	32	-	-
419940 - Restitution	3	3	-	3	3	-	-
419941 - Financial Rebates	388	396	372	404	850	-	-
419950 - Sales, Royalties and Events	3	3	12	3	3	-	-
419965 - Administrative Claiming	7	179	172	241	350	-	-
419970 - Public Records Request	4	4	5	-	3	-	-
Subtotal - Other Revenue from Local Sources	28,028	33,399	30,018	25,831	28,701	-	-
421010 - County School Funds	10	8	6	15	9	-	-
421020 - Ed Service Dist Apportionment	3,500	1,500	7,000	2,000	3,750	-	-
421990 - Other Intermediate Sources	511	499	373	532	632	-	-
421991 - City of Portland	4,955	5,215	5,348	5,300	5,400	-	-
Subtotal - 2000 - REVENUE - INTERMEDIATE SOURCES	8,977	7,222	12,727	7,847	9,791	-	-
431010 - SSF--General Support	265,671	274,366	268,519	291,053	310,300	-	-
431030 - Common School Fund	6,362	6,415	6,605	6,138	6,800	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	272,033	280,781	275,124	297,191	317,100	-	-
442020 - Medicaid Reimb. Eligible K12	-	-	136	-	400	-	-
445080 - Fed Grants- State Pass Thru	-	7	-	-	-	-	-
448010 - Federal Forest Fees	21	21	9	15	15	-	-
Subtotal - 4000 - REVENUE FROM FEDERAL SOURCES	21	28	146	15	415	-	-
452100 - Interfund Transfers	-	-	-	23,962	394	-	-
Subtotal - 5200 - INTERFUND TRANSFERS	-	-	-	23,962	394	-	-
451600 - Lease Proceeds	958	-	-	-	-	-	-
453000 - Sale of Fixed Assets	66	115	94	50	2,550	-	-
Subtotal - All Other Budget Resources	1,024	115	94	50	2,550	-	-
Total Resources by Object	830,038	873,375	855,834	868,580	862,112	-	-

Requirements by Function - 100 - General Funds (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
1111 - ELEMENTARY K-5	123,301	128,709	135,080	143,637	**887.77**	144,164	-	-	**870.20**
1113 - ELEMENTARY EXTRA CURRICULAR	76	518	230	186	**-**	106	-	-	**-**
1121 - MIDDLE SCHOOL PROGRAMS	53,620	58,178	65,467	73,507	**443.64**	75,828	-	-	**436.87**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
1122 - MIDDLE SCHOOL EXTR CURRICULAR	367	648	1,105	1,802	**10.53**	2,073	-	-	**11.60**
1131 - HIGH SCHOOL PROGRAMS	83,505	91,685	94,323	103,705	**612.72**	103,134	-	-	**583.62**
1132 - HIGH SCHOOL EXTRA CURRICULAR	8,288	8,826	9,920	7,055	**9.32**	7,330	-	-	**3.45**
1140 - PRE KINDERGARTEN PROGRAMS	322	30	225	195	**-**	195	-	-	**-**
1100 - INSTRUCTIONAL OTHER	12,648	14,252	14,337	(5,920)	**-**	(3,984)	-	-	**-**
1210 - PROGRAMS FOR TALENTED AND GIFTED	401	493	324	407	**-**	355	-	-	**-**
1220 - RESTRICTIVE PROGRAMS	21,425	24,948	30,557	37,221	**344.88**	38,899	-	-	**341.13**
1250 - LESS RESTRICTIVE PROGRAMS	31,222	33,822	37,189	43,175	**359.07**	40,136	-	-	**298.23**
1260 - TREATMENT AND HABILITATION	2,323	2,751	1,276	1,068	**6.00**	773	-	-	**4.00**
1271 - REMEDIATION	-	-	995	1,607	**10.66**	2,029	-	-	**12.55**
1272 - TITLE I A/D	-	-	1	-	**-**	-	-	-	**-**
1280 - ALTERNATIVE EDUCATION	26,511	31,215	31,154	32,168	**7.07**	30,807	-	-	**6.33**
1291 - ENGLISH LANGUAGE LEARNER	11,538	13,659	15,428	17,065	**116.54**	15,450	-	-	**98.45**
1292 - TEEN PARENT PROGRAMS	51	45	36	39	**-**	62	-	-	**-**
1299 - OTHER SPECIAL PROGRAMS	716	784	803	1,033	**9.50**	1,073	-	-	**9.50**
1400 - SUMMER SCHOOL PROGRAMS	472	1,149	784	466	**-**	458	-	-	**-**
Subtotal - 1000 - INSTRUCTION	376,786	411,711	439,231	458,417	**2,817.71**	458,888	-	-	**2,675.93**
2110 - ATTENDANCE/SOCIAL WORK SVCS	14,864	17,955	16,585	18,965	**165.34**	19,576	-	-	**159.79**
2120 - GUIDANCE SERVICES	24,458	26,582	28,749	29,693	**181.63**	27,356	-	-	**159.92**
2130 - HEALTH SERVICES PROGRAMS	-	(13)	54	-	**-**	-	-	-	**-**
2140 - PSYCHOLOGICAL SERVICES	6,080	3,131	7,263	7,492	**46.44**	7,195	-	-	**42.91**
2150 - SPEECH PATHOLOGY/AUDIOLOGY SVC	11,081	12,585	14,788	16,282	**101.40**	16,136	-	-	**97.40**
2160 - OTHER STUDENT TREATMENT SVCS	3,807	3,814	4,748	5,263	**29.80**	5,445	-	-	**29.80**
2190 - SVC DIRECTION-STUDENT SUPPORT	16,324	19,958	19,246	16,766	**76.75**	11,907	-	-	**51.04**
2210 - IMPROVEMENT OF INSTRUCTION	8,257	9,531	9,706	10,235	**30.50**	6,396	-	-	**13.00**
2220 - EDUCATIONAL MEDIA SERVICES	13,555	13,639	11,439	11,957	**75.19**	11,663	-	-	**69.07**
2230 - ASSESSMENT AND TESTING	788	548	506	606	**-**	771	-	-	**1.00**
2240 - INSTRUC STAFF DEVELOPMENT	17,695	17,934	8,019	10,994	**29.39**	11,404	-	-	**29.49**
2310 - BOARD OF EDUCATION SERVICES	847	747	948	1,022	**3.00**	950	-	-	**2.00**
2320 - EXECUTIVE ADMINISTRATION SVCS	12,252	15,120	9,716	10,779	**34.75**	9,560	-	-	**28.25**
2410 - OFFICE OF THE PRINCIPAL SVCS	51,342	56,810	55,740	58,105	**371.63**	58,889	-	-	**358.54**
2490 - OTHER SCHOOL SUPPORT ADMIN	554	499	485	508	**-**	508	-	-	**-**
2510 - SUPPORT SERVICES-BUSINESS	440	454	498	548	**2.00**	483	-	-	**2.00**
2520 - FISCAL SERVICES	15,060	17,167	8,943	9,394	**52.00**	8,117	-	-	**42.00**
2540 - OPER/MAINTENANCE OF PLANT SVCS	67,567	71,808	74,605	71,157	**486.15**	72,437	-	-	**443.85**
2550 - STUDENT TRANSPORTATION SERVICE	42,257	46,908	48,568	44,126	**113.00**	47,648	-	-	**113.98**
2570 - INTERNAL SERVICES	4,547	3,398	2,627	2,999	**18.00**	2,180	-	-	**13.00**
2610 - DIRECTION OF CENTRAL SUPPORT	1,064	432	432	588	**2.00**	563	-	-	**2.00**
2620 - RESEARCH,DEVELOP,EVAL SVCS	2,367	2,687	2,989	2,686	**12.50**	2,600	-	-	**8.00**
2630 - INFORMATION SERVICES	3,007	3,466	4,022	4,330	**26.25**	4,183	-	-	**20.13**
2640 - STAFF SERVICES	7,299	8,507	8,567	10,564	**57.13**	8,892	-	-	**45.00**
2660 - TECHNOLOGY SERVICES	17,444	16,530	17,191	14,695	**64.20**	13,689	-	-	**58.00**
2670 - RECORDS MANAGEMENT SVCS	402	379	474	449	**3.00**	455	-	-	**3.00**
2690 - OTHER SUPPORT SERVICES	-	-	3	(13,010)	**-**	(3,982)	-	-	**-**
Subtotal - 2000 - SUPPORT SERVICES	343,359	370,577	356,910	347,191	**1,982.05**	345,021	-	-	**1,793.16**
3100 - FOOD SERVICES	5	1	-	-	**-**	-	-	-	**-**
3300 - COMMUNITY SVCS	3,109	4,122	4,727	4,617	**17.75**	2,391	-	-	**12.25**
Subtotal - 3000 - ENTERPRISE AND COMMUNITY SVCS	3,114	4,123	4,727	4,617	**17.75**	2,391	-	-	**12.25**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
4110 - Service Area Direction	-	-	-	-	-	1	-	-	-
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	-	-	-	-	-	1	-	-	-
52100 - Fund Transfers	1,282	887	10,643	17,176	-	14,755	-	-	-
Subtotal - 5200 - TRANSFERS OF FUNDS	1,282	887	10,643	17,176	-	14,755	-	-	-
61100 - Operating Contingency	-	-	-	41,179	-	41,056	-	-	-
Subtotal - 6000 - CONTINGENCIES	-	-	-	41,179	-	41,056	-	-	-
71100 - Ending Fund Balance	105,497	86,078	44,323	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	105,497	86,078	44,323	-	-	-	-	-	-
Total Requirements by Function	830,038	873,375	855,834	868,580	**4,817.50**	862,112	-	-	**4,481.34**

Requirements by Object - 100 - General Funds (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
511100 - Licensed Staff	245,309	260,283	274,755	280,529	**2,840.89**	276,175	-	-	**2,718.10**
511210 - Classified - Represented	58,986	64,252	66,903	69,907	**1,375.89**	65,416	-	-	**1,255.72**
511220 - Non-Represented Staff	29,668	31,970	34,153	34,826	**336.53**	30,991	-	-	**282.64**
511310 - Administrators - Licensed	32,743	36,286	37,491	37,036	**225.20**	31,497	-	-	**188.90**
511320 - Administrators - NonLicensed	1,420	1,226	1,488	1,704	**8.00**	2,459	-	-	**11.00**
511420 - Directors/Program Admins	5,155	4,802	4,340	5,061	**31.00**	4,194	-	-	**24.98**
512100 - Substitutes - Licensed	12,255	13,180	13,080	9,771	-	12,749	-	-	-
512200 - Substitutes - Classified	486	655	1,054	1,459	-	320	-	-	-
512300 - Temporary Misc - Licensed	1,522	1,709	2,123	744	-	668	-	-	-
512400 - Temporary Misc - Classified	779	741	723	252	-	362	-	-	-
513100 - Extended Responsibility - LIC	3,196	3,019	2,872	2,108	-	2,075	-	-	-
513200 - Extended Responsibility - CLS	2,085	2,508	3,310	1,228	-	2,166	-	-	-
513300 - Extended Hours	3,511	5,742	5,158	5,959	-	5,129	-	-	-
513350 - PAT Overload Pay Stipend	2,654	3,242	3,549	4,058	-	6,318	-	-	-
513400 - Overtime Pay	1,661	1,980	1,656	595	-	743	-	-	-
513510 - Group Hlth Opt Out Lic	287	337	354	3	-	-	-	-	-
513520 - Group Hlth Opt Out Non Lic	42	45	36	-	-	-	-	-	-
Subtotal - 100 - SALARIES	401,759	431,978	453,046	442,949	**4,817.50**	435,264	-	-	**4,481.34**
521000 - PERS	42	9	4	18,864	-	18,018	-	-	-
521310 - PERS UAL	64,058	66,191	70,314	76,989	-	81,139	-	-	-
522000 - Social Security - FICA	30,255	32,579	34,106	33,886	-	33,032	-	-	-
523100 - Workers' Compensation	3,202	2,459	(407)	3,052	-	1,738	-	-	-
523200 - Unemployment Compensation	4	4,956	440	515	-	1,611	-	-	-
523300 - PFMLA	-	1,851	2,357	1,993	-	2,521	-	-	-
524100 - Group Health Insurance	87,193	93,618	101,396	108,246	-	102,363	-	-	-
524200 - Other Employer Paid Benefits	655	782	768	795	-	775	-	-	-
524300 - Retiree Health Insurance	1,703	1,995	1,887	2,082	-	2,030	-	-	-
524530 - Early Retirement Benefits	502	724	628	709	-	649	-	-	-
524510 - PAT Union Tuition Reimbursemnt	586	586	635	875	-	875	-	-	-
524520 - PAT Union Prof Improvement Fds	351	461	567	500	-	500	-	-	-
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	188,552	206,210	212,696	248,507	-	245,251	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
531100 - Instructional Services	2,802	3,925	4,298	5,324	-	5,000	-	-	-
531200 - Instr Program Improvement Svcs	1,782	1,626	1,241	1,105	-	1,035	-	-	-
531300 - Student Services	28	11	13	246	-	126	-	-	-
531800 - Local Mtgs/Non-Instr Staff Dev	1,429	914	448	905	-	760	-	-	-
531810 - Non-Instr Dev Profess Dev Fds	122	98	125	259	-	104	-	-	-
531900 - Other Instr Prof/Tech Svcs	3,271	3,750	2,603	1,837	-	2,363	-	-	-
532100 - Cleaning Services	-	40	3	-	-	-	-	-	-
532200 - Repairs and Maintenance Svcs	997	1,384	880	1,729	-	778	-	-	-
532400 - Rentals	304	301	235	362	-	383	-	-	-
532500 - Electricity	4,402	4,839	5,815	5,373	-	6,450	-	-	-
532600 - Fuel	4,200	3,520	3,499	4,763	-	3,285	-	-	-
532700 - Water and Sewage	3,201	3,390	3,992	3,634	-	3,634	-	-	-
532800 - Garbage	1,146	1,034	1,076	1,185	-	1,185	-	-	-
532900 - Other Property Services	9,947	9,408	10,781	3,245	-	8,790	-	-	-
533110 - Reimb - School Bus	23,696	28,710	29,716	25,495	-	28,829	-	-	-
533120 - Reimb - Taxi Cab	3,513	2,647	2,405	3,290	-	2,885	-	-	-
533130 - Reimb - In-Lieu	22	12	14	14	-	14	-	-	-
533140 - Reimb - Tri-Met	2,020	2,025	2,034	2,066	-	2,108	-	-	-
533150 - Reimb - Field Trips	1,241	1,578	1,923	1,258	-	1,388	-	-	-
533200 - Non-Reimb Student Transport	1,101	1,255	1,333	763	-	953	-	-	-
534100 - Travel, Local in District	395	148	143	195	-	208	-	-	-
534200 - Travel, Out of District	726	503	604	497	-	380	-	-	-
534210 - Trav Out Dist Profess Dev Fds	42	54	58	4	-	4	-	-	-
534300 - Travel, Student Activities	412	449	408	767	-	705	-	-	-
534900 - Other Travel	-	-	1	-	-	-	-	-	-
534901 - Student Academic Transport	-	-	7	7	-	7	-	-	-
535100 - Telephone	597	873	683	414	-	721	-	-	-
535300 - Postage	278	291	91	353	-	371	-	-	-
535400 - Advertising	119	88	49	67	-	65	-	-	-
535500 - Printing and Binding	1,091	954	1,349	1,643	-	1,427	-	-	-
535920 - Internet Fees	-	9	37	-	-	-	-	-	-
535990 - Wide Area Network/Misc	999	248	190	1,005	-	52	-	-	-
536000 - Charter Schools	16,670	18,504	18,177	19,449	-	18,639	-	-	-
537300 - Tuition to Private Schools	7,731	9,514	9,936	9,898	-	9,410	-	-	-
537410 - Tuition - Fees College Credit	10	48	77	-	-	-	-	-	-
538100 - Audit Services	220	353	265	227	-	227	-	-	-
538200 - Legal Services	1,068	1,198	1,063	1,370	-	1,350	-	-	-
538300 - Architect and Engineering Svcs	139	326	118	-	-	-	-	-	-
538400 - Negotiation Services	116	433	5	140	-	100	-	-	-
538500 - Management Services	65	382	735	78	-	78	-	-	-
538600 - Data Processing Services	85	-	-	-	-	-	-	-	-
538800 - Election Services	249	74	331	350	-	350	-	-	-
538910 - Security Services	130	494	298	148	-	83	-	-	-
538920 - Staff Services	26	27	33	-	-	-	-	-	-
538930 - Secretarial/Clerical Services	-	16	36	-	-	-	-	-	-
538940 - Professional Moving Services	162	214	253	163	-	164	-	-	-
538950 - Professional Health Care Svcs	14	83	30	2	-	2	-	-	-
538960 - Professional Child Care Svcs	116	35	2	356	-	194	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
538970 - Graphic Arts Services	63	1	-	7	-	7	-	-	-
538980 - Laundering Services	27	50	78	21	-	17	-	-	-
538990 - Non-Instr Pers/Professional Sv	10,023	13,862	9,412	4,636	-	5,855	-	-	-
538995 - Meal Services	-	-	189	187	-	187	-	-	-
Subtotal - 300 - PURCHASED SERVICES	106,798	119,699	117,095	104,835	-	110,672	-	-	-
541000 - Consumable Supplies	7,471	7,840	6,487	6,098	-	6,165	-	-	-
541100 - Loss Prevention	-	18	-	-	-	-	-	-	-
541270 - Food Inventory Adjustm-NS Only	1	-	-	-	-	-	-	-	-
541310 - Auto Parts, Batteries	162	179	195	-	-	-	-	-	-
541315 - Tires	27	32	38	44	-	30	-	-	-
541320 - Oil & Lubricants	10	11	16	13	-	13	-	-	-
541325 - Gas	227	241	171	163	-	168	-	-	-
541330 - Propane	181	157	103	115	-	144	-	-	-
541400 - Maintenance Materials	1,651	1,751	1,814	610	-	732	-	-	-
541500 - Inventory Adjustments	1	(17)	(27)	20	-	20	-	-	-
541600 - Interdepartmental Charges	(357)	(154)	(171)	54	-	60	-	-	-
542100 - Textbook Expansion	145	192	126	374	-	179	-	-	-
542200 - Textbook Adoption	135	-	44	-	-	-	-	-	-
542300 - Textbook Replacement	-	14	-	-	-	-	-	-	-
543000 - Library Books	384	407	250	379	-	356	-	-	-
544000 - Periodicals	8	8	13	3	-	9	-	-	-
544100 - Online Periodical Subscription	68	112	150	112	-	159	-	-	-
546000 - Non-Consumable Supplies	457	1,107	903	364	-	101	-	-	-
546100 - Minor Equipment - Tagged	68	108	88	173	-	173	-	-	-
547000 - Computer Software	2,981	4,379	3,939	2,187	-	3,745	-	-	-
548000 - Computer Equipment	1,015	470	737	965	-	681	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	14,633	16,856	14,878	11,674	-	12,736	-	-	-
552000 - Building Acquisition/Improvmnt	261	21	-	-	-	-	-	-	-
553000 - Improvements - Not Buildings	6	42	-	-	-	-	-	-	-
554100 - Initial and Addl Equipment	1,174	432	329	109	-	454	-	-	-
554110 - Vehicles	353	892	81	383	-	350	-	-	-
555010 - Computers	47	65	18	62	-	69	-	-	-
555020 - Printers	958	-	-	-	-	-	-	-	-
555030 - Software Capital Expense	6	57	54	-	-	-	-	-	-
555090 - Misc Other Technology	89	94	26	357	-	175	-	-	-
556410 - Buses/Capital Bus Improvements	312	227	430	-	-	-	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	3,207	1,829	938	912	-	1,047	-	-	-
561000 - Redemption of Principal	391	-	-	-	-	-	-	-	-
562000 - Interest	15	-	-	-	-	-	-	-	-
563000 - Fiscal Charges	225	237	245	110	-	110	-	-	-
563400 - Bad Debt Expense	-	231	401	-	-	-	-	-	-
563500 - Administrative Write-Off	139	7	-	-	-	-	-	-	-
564000 - Dues and Fees	1,095	647	1,042	742	-	725	-	-	-
564010 - Dues & Fees Profess Dev Fds	-	-	-	91	-	91	-	-	-
565100 - Liability Insurance	1,071	1,237	-	-	-	-	-	-	-
565300 - Property Insurance Premiums	3,619	4,231	113	-	-	-	-	-	-
565500 - Judgmnts&Settlemnts Against	680	928	343	380	-	380	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
565930 - Deductible Insurance Loss	1,019	2,265	6	-	**-**	-	-	-	**-**
567100 - Permits	49	40	53	26	**-**	26	-	-	**-**
567200 - Public Assessments	8	16	9	-	**-**	-	-	-	**-**
Subtotal - Other Objects	8,311	9,839	2,214	1,349	**-**	1,332	-	-	**-**
571000 - Transfers to Other Funds	1,282	887	10,643	17,176	**-**	14,755	-	-	**-**
Subtotal - 700 - TRANSFERS	1,282	887	10,643	17,176	**-**	14,755	-	-	**-**
581000 - Operating Contingency	-	-	-	41,179	**-**	41,056	-	-	**-**
Subtotal - 581000 - Operating Contingency	-	-	-	41,179	**-**	41,056	-	-	**-**
376520 - Budgeted Ending Fund Balance	105,497	86,078	44,323	-	**-**	-	-	-	**-**
Subtotal - 376520 - Budgeted Ending Fund Balance	105,497	86,078	44,323	-	**-**	-	-	-	**-**
Total Requirements by Object	830,038	873,375	855,834	868,580	**4,817.50**	862,112	-	-	**4,481.34**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

ACCRUED OBLIGATION FOR POST-EMPLOYMENT BENEFITS

Early Retirement

The District has a single-employer defined benefit early retirement supplement program.

Retirement Health Insurance Subsidy (RHIS) Plan Description – The District provides a single-employer defined benefit plan that provides post-employment health, dental, vision and life insurance benefits to eligible employees and their spouses for employees who have retired from the District with a minimum of 15 accumulated years of service and are eligible to retire from the Oregon retirement system. Covered employees under the plan are eligible to receive full or part time District-paid medical and pharmacy benefits for up to 60 months, or until reaching age 65, whichever comes first. The program was established under separate collective bargaining agreements with certified and classified employees and by precedent for all other certified District employees. The Portland Association of Teachers (PAT) group terminated this benefit after September 30, 2019. All other bargaining units and employee groups, except the District Council Unions (DCU), agreed to terminate this benefit after June 30, 2014. The DCU agreed to terminate this benefit after December 31, 2014.

Summary of Significant Accounting Policies - The Retirement Health Insurance Subsidy (RHIS) is a health and welfare program the District provides for retirees. The plan is actuarially determined, is reflected as a long-term liability in the government-wide financial statements and reflects the present value of expected future payments. The net other post-employment benefits liability and expenditure in the governmental fund financial statements are limited to amounts that become due and payable as of the end of the fiscal year, and are reported on a pay-as-you-go basis.

Funding policy - The benefits from this program are fully paid by the District; therefore, no contributions by employees are required. The District's total actuarially determined liability on June 30, 2025 was $78.4 million.

Contributions - Contributions are financed on a pay-as-you-go basis. Prior year expenditures, on a budgetary basis, along with current band prior year budgets can be found in Object 524530.

Stipend

Stipend Plan Description – The District provides a single-employer defined benefit early retirement program for members of the PAT, physical therapists, occupational therapists and licensed administrators. Certificated employees with 15 consecutive years of at least half-time service with the District, and who are eligible to retire under OPERS, and who retired before age 62 are eligible for the early retirement benefits. Eligible employees are entitled to a monthly benefit of $425 dollars commencing on the first month after their retirement. Benefits are payable up to the earlier of attaining age 62 or receiving 60 monthly payments. The General Fund and the Special Revenue Fund are the primary funds from which the stipend liability is liquidated. The District does not issue a separate stand-alone financial report for this plan. The District pays for the benefits without any cost to employees. The contributions are financed on a pay-as-you-go basis, and there are no assets accumulated in a trust.

The program was established under separate bargaining agreements and may be amended by the District under new collective bargaining agreements.

Summary of Significant Accounting Policies - The District provides a single-employer defined benefit early retirement program. The stipend benefit is actuarially determined, is reflected as a long-term liability in the government-wide financial statements, and reflects the present value of expected future payments. This plan is accounted for under the provisions of GASB Statement No. 73.

Funding policy - The benefits from this program are fully paid by the District; therefore, no contributions by employees are required. The District's total actuarially determined liability on June 30, 2025 was $5.4 million.

Contributions - Contributions are financed on a pay-as-you-go basis. Prior year expenditures, on a budgetary basis, along with current band prior year budgets can be found in Object 524300.

SPECIAL REVENUE FUNDS SUMMARY (200)

Fund 200 - Special Revenue Funds Resources Summary

Total resources for the Special Revenue Fund are projected to decrease by $0.9 million, or 0.4%, from $224.8 million in 2025-26 to $223.9 million in 2026-27. This modest decrease is primarily driven by a lower beginning fund balance, which is expected to decrease by $15.8 million, along with $7.8 million in reduced revenue from federal sources. Intermediate sources are projected to grow by $13.4 million and local revenues by $5.9 million, reflecting continued funding for essential grant-supported programs.

Major federal resources for the 2026-2027 school year include Every Student Succeeds Act (ESSA), federal Title, IDEA, Head Start, and Nutrition programs. Major state resources under the Integrated Grant Guidance (IGG) include the Student Investment Account, High School Success, CTE, Early Indicator and Intervention, and Early Literacy grants. These and other resources supplement our core programs to provide opportunities such as:

- High-Dosage Tutoring
- Mental and Behavioral Health Supports
- Culturally Specific Community Partnerships
- School-Based Instructional Support Staff
- College and Career Readiness
- Educator Professional Development

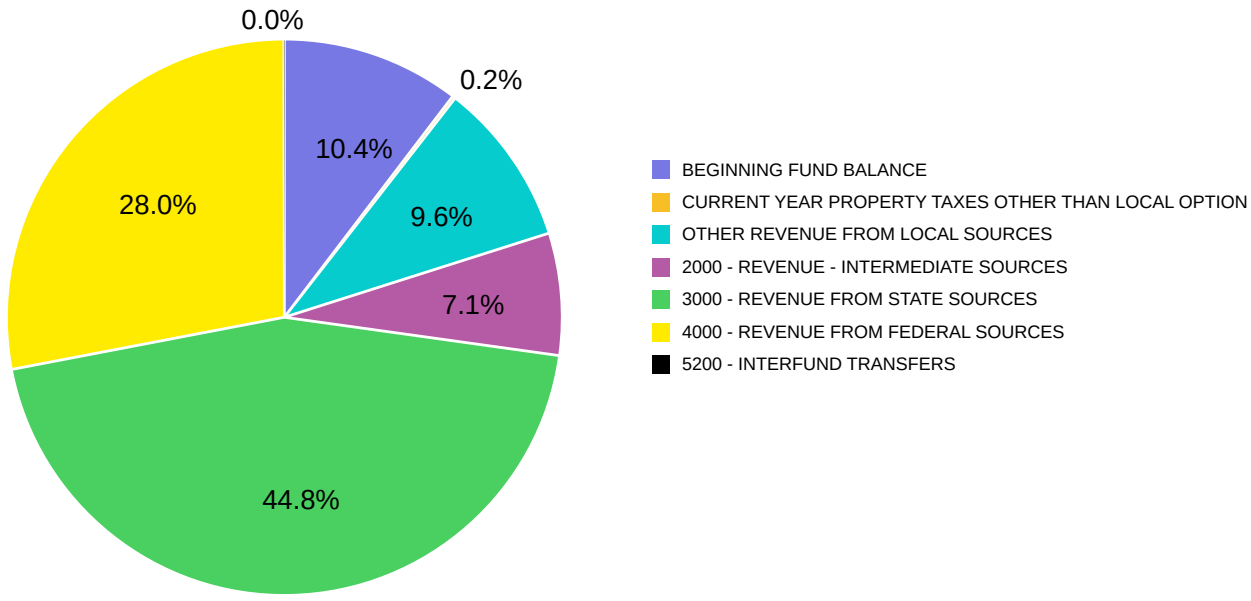
Fund 200 - Special Revenue Funds Requirements Summary

The majority of anticipated expenditures in Fund 200 are for payroll and associated costs, as well as purchased services. These Special Revenue Funds support the District's mission to provide rigorous, high-quality academic learning and its vision of a graduate who is a compassionate critical thinker, prepared to lead a more socially just world. These funds are integrated with our general funds to enhance learning opportunities and promote equity for historically underserved students.

Summary of Resources by Major Object 200 - Special Revenue Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
BEGINNING FUND BALANCE	35,069	36,665	45,112	39,008	23,224	-	-
CURRENT YEAR PROPERTY TAXES OTHER THAN LOCAL OPTION	343	373	382	373	394	-	-
OTHER REVENUE FROM LOCAL SOURCES	20,977	21,515	18,883	15,497	21,406	-	-
2000 - REVENUE - INTERMEDIATE SOURCES	186	332	663	2,468	15,895	-	-
3000 - REVENUE FROM STATE SOURCES	91,700	80,031	104,812	95,383	100,300	-	-
4000 - REVENUE FROM FEDERAL SOURCES	101,023	108,567	62,822	70,460	62,663	-	-
5200 - INTERFUND TRANSFERS	56	77	404	1,616	55	-	-
Total Resources	**249,353**	**247,560**	**233,078**	**224,805**	**223,936**	**-**	**-**

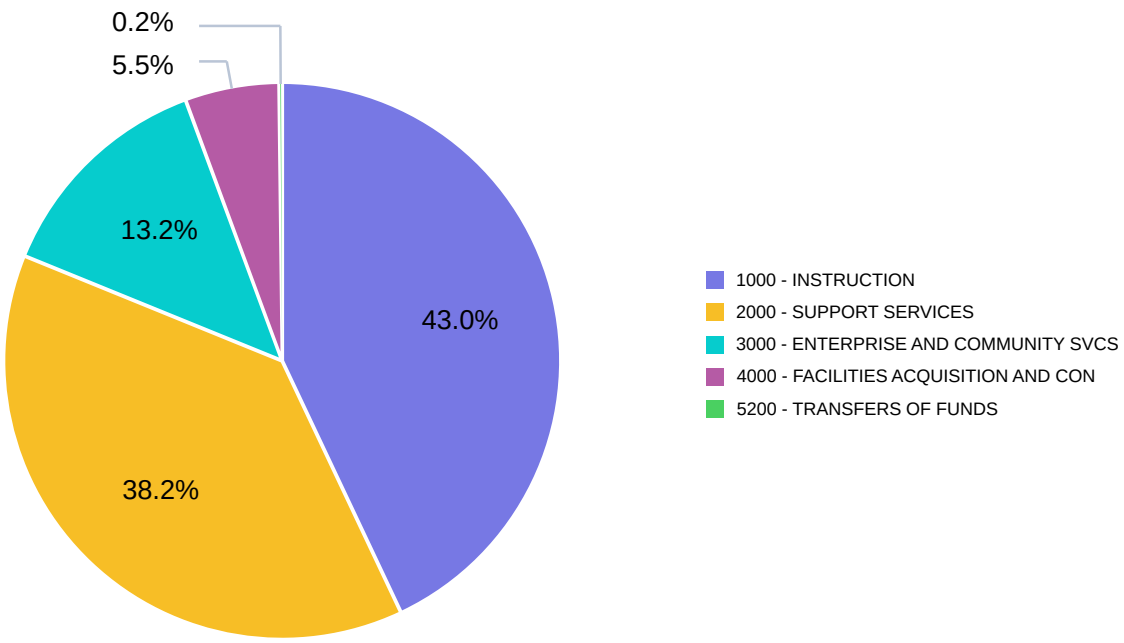
Percent of Resources by Major Object - 200 - Special Revenue Funds



Summary of Requirements by Major Function 200 - Special Revenue Funds (in thousands)

Major Function	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
1000 - INSTRUCTION	94,822	89,127	79,734	86,733	**443.07**	96,245	-	-	**496.18**
2000 - SUPPORT SERVICES	85,939	85,114	80,392	77,509	**306.06**	85,491	-	-	**293.74**
3000 - ENTERPRISE AND COMMUNITY SVCS	31,764	28,006	28,246	36,551	**215.78**	29,550	-	-	**209.91**
4000 - FACILITIES ACQUISITION AND CON	164	202	-	50	**-**	12,256	-	-	**-**
5200 - TRANSFERS OF FUNDS	-	-	-	23,962	**-**	394	-	-	**-**
7000 - UNAPPROPRIATED FUND BALANCE	36,665	45,112	44,706	-	**-**	-	-	-	**-**
Total Requirements	**249,353**	**247,560**	**233,078**	**224,805**	**964.91**	**223,936**	**-**	**-**	**999.82**

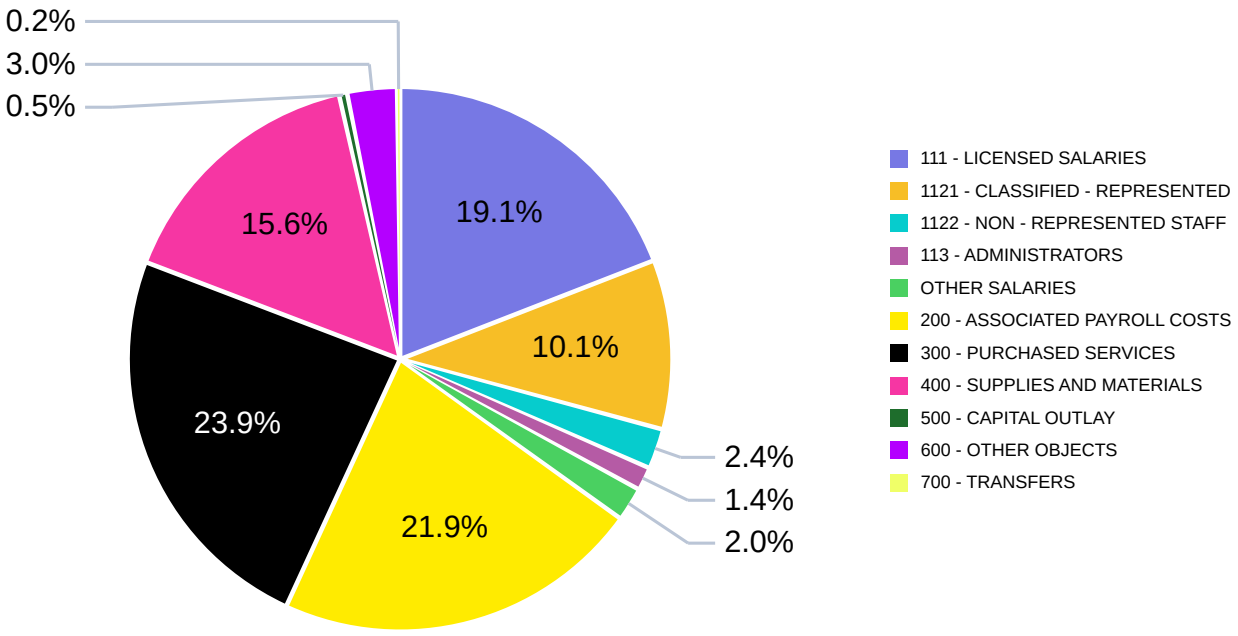
Percent of Requirements by Major Function 200 - Special Revenue Funds



Summary of Requirements by Major Object 200 - Special Revenue Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
111 - LICENSED SALARIES	50,194	50,410	46,657	43,498	**432.38**	42,748	-	-	**417.51**
1121 - CLASSIFIED - REPRESENTED	19,883	20,969	20,629	19,761	**443.68**	22,546	-	-	**504.46**
1122 - NON - REPRESENTED STAFF	7,561	7,026	6,271	5,872	**69.40**	5,365	-	-	**59.06**
113 - ADMINISTRATORS	6,096	4,848	3,828	3,037	**19.45**	3,125	-	-	**18.80**
OTHER SALARIES	10,499	11,707	8,523	3,477	-	4,517	-	-	-
200 - ASSOCIATED PAYROLL COSTS	44,356	46,125	41,456	44,665	-	49,063	-	-	-
300 - PURCHASED SERVICES	36,011	28,405	27,716	43,821	-	53,595	-	-	-
400 - SUPPLIES AND MATERIALS	28,542	25,697	26,884	30,619	-	34,878	-	-	-
500 - CAPITAL OUTLAY	1,724	699	1,242	180	-	1,085	-	-	-
600 - OTHER OBJECTS	7,822	6,562	5,165	5,913	-	6,620	-	-	-
700 - TRANSFERS	-	-	-	23,962	-	394	-	-	-
376520 - Budgeted Ending Fund Balance	36,665	45,112	44,706	-	-	-	-	-	-
Total Requirements	**249,353**	**247,560**	**233,078**	**224,805**	**964.91**	**223,936**	**-**	**-**	**999.82**

Percent of Requirements by Major Object 200 - Special Revenue Funds



STUDENT BODY ACTIVITY FUND (201)

The Student Body Activity Fund accounts for the receipts, disbursements and cash balances of the various schools' Student Body Funds. The resources are primarily generated by students, student groups, Parent Teacher Associations (PTAs), booster clubs, fundraising activities and donations. With financial oversight provided by the District's Finance office, individual schools are responsible for managing their school's fund. Each school's Student Body Fund is reviewed on a recurring schedule.

Fund 201 - Student Body Activity Fund Detail

Resources by Object - 201 - School Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	4,000	4,000	-	-
377000 - Fund Balance-Unres/Undes	5,135	4,858	4,844	-	-	-	-
Subtotal - Beginning Fund Balance	5,135	4,858	4,844	4,000	4,000	-	-
417900 - Other Curricular Activities	5,727	6,308	6,773	6,000	6,000	-	-
Subtotal - Other Revenue from Local Sources	5,727	6,308	6,773	6,000	6,000	-	-
Total Resources by Object	10,862	11,166	11,617	10,000	10,000	-	-

Requirements by Function - 201 - School Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
1113 - ELEMENTARY EXTRA CURRICULAR	-	1,252	1,382	-	-	-	-	-	-
1122 - MIDDLE SCHOOL EXTR CURRICULAR	-	732	931	-	-	-	-	-	-
1132 - HIGH SCHOOL EXTRA CURRICULAR	6,004	4,339	4,155	10,000	-	10,000	-	-	-
Subtotal - 1000 - INSTRUCTION	6,004	6,322	6,468	10,000	-	10,000	-	-	-
71100 - Ending Fund Balance	4,858	4,844	5,149	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	4,858	4,844	5,149	-	-	-	-	-	-
Total Requirements by Function	10,862	11,166	11,617	10,000	-	10,000	-	-	-

Requirements by Object - 201 - School Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
541000 - Consumable Supplies	6,004	6,322	6,468	10,000	-	10,000	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	6,004	6,322	6,468	10,000	-	10,000	-	-	-
376520 - Budgeted Ending Fund Balance	4,858	4,844	5,149	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	4,858	4,844	5,149	-	-	-	-	-	-
Total Requirements by Object	10,862	11,166	11,617	10,000	-	10,000	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

CAFETERIA FUND (202)

This fund provides for all costs associated with operating federally-funded child nutrition programs in Portland schools.

The District served 5,474,086 breakfasts, lunches, and after school suppers and was awarded a fresh fruit and vegetable program grant at 23 schools during 2024-25. In the 2024-25 school year, the District offered free breakfast and lunch to all students, regardless of their household income, due to expanded federal eligibility and additional state funding. Additionally, for eight weeks in the summer, breakfasts and/or lunches are served for free to children ages 1-18 years at schools, community, or park locations.

Operating costs include menu planning (recipe testing, product/food testing, nutritional analysis and food crediting, participation tracking), supply chain management (bid specification, purchasing, inventory control, warehousing and delivery), meal production and service (HACCP food safety procedures and inspections, food preparation and cooking, equipment maintenance), management of information services (student meal accounts, collection and processing eligibility from family meal benefit applications, regular download and analysis of direct certification information, ensuring sibling matches for extension of benefits, determining district socio-economic data, technical support of a web-based department enterprise system), human resource management (recruiting, hiring, training, professional development, performance reviews, progressive discipline, union negotiations), marketing and communication (printing, communication to families about eligibility and meal accounts, information about programs and services, webpage and social media accounts), financial management (budget and grant management), and occasional contract meal service to outside agencies.

Operating funds are generated through sales of meals to students and reimbursement for meals served to students under United States Department of Agriculture (USDA) Child Nutrition Program reimbursement guidelines. USDA establishes a fixed reimbursement rate for each documented meal served and sets the household income guidelines that determine a family's eligibility for free or reduced priced meals. USDA requires that paid meal price covers expenses, and federal reimbursements for free or reduced priced meals should not subsidize the cost for paid eligible meals.The state of Oregon provides reimbursement to cover the family portions (copays) of the reduced-price eligible meals for both breakfast and lunch, and the copay for federal paid eligible meals served to families eligible for the Oregon Expanded Income Guidelines (EIG) established under the Student Success Act. The department regularly seeks out additional grant funds each biennium through Oregon Farm to School opportunities. This state funded grant, both non-competitive and competitive, supports the department's long-standing value and mission to serve local foods to Portland students and reinvest into our community and local economy.

The District made a commitment to raise the minimum wage for classified workers and insurance for part time employees. In order to meet that commitment and due to other increased expenses, a transfer of $35 thousand from the General Fund is included in the Cafeteria Fund 2026-27 budget.

Fund 202 - Cafeteria Fund Detail

Resources by Object - 202 - Cafeteria Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	1,367	250	-	-
377000 - Fund Balance-Unres/Undes	6,581	4,753	60	-	-	-	-
Subtotal - Beginning Fund Balance	6,581	4,753	60	1,367	250	-	-
416120 - Lunch	2,503	1,956	(49)	60	10	-	-
419200 - Contrib-Donation - Priv Source	12	3	34	25	25	-	-
419600 - Recovery PY Expenditure	-	-	7	-	-	-	-
419700 - Services Provided Other Funds	162	227	382	330	213	-	-
419910 - Miscellaneous	6	5	14	10	10	-	-
419940 - Restitution	-	1	-	-	-	-	-
419950 - Sales, Royalties and Events	3	27	125	237	68	-	-
Subtotal - Other Revenue from Local Sources	2,687	2,219	514	662	326	-	-
431020 - SSF--School Lunch Match	156	157	-	157	157	-	-
432990 - Restricted State Grants	3,192	3,300	7,915	7,149	7,149	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	3,348	3,457	7,915	7,306	7,306	-	-
445010 - Fed Reimburse-Breakfast	2,476	2,816	3,503	3,695	4,015	-	-
445020 - Fed Reimburse-Lunch	8,897	8,670	11,468	12,132	12,623	-	-
445030 - Fed Reimburse-Fresh Fruit & Ve	567	399	145	487	493	-	-
445060 - Fed Reimburse - Supper	627	615	-	-	-	-	-
445080 - Fed Grants- State Pass Thru	1,677	1,200	1,482	1,375	1,482	-	-
Subtotal - 4000 - REVENUE FROM FEDERAL SOURCES	14,245	13,700	16,597	17,688	18,613	-	-
452100 - Interfund Transfers	56	77	404	1,616	35	-	-
Subtotal - 5200 - INTERFUND TRANSFERS	56	77	404	1,616	35	-	-
Total Resources by Object	26,916	24,206	25,490	28,638	26,531	-	-

Requirements by Function - 202 - Cafeteria Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
2520 - FISCAL SERVICES	646	703	730	841	**-**	778	-	-	**-**
Subtotal - 2000 - SUPPORT SERVICES	646	703	730	841	**-**	778	-	-	**-**
3100 - FOOD SERVICES	21,517	23,443	24,324	27,797	**192.78**	25,752	-	-	**187.91**
Subtotal - 3000 - ENTERPRISE AND COMMUNITY SVCS	21,517	23,443	24,324	27,797	**192.78**	25,752	-	-	**187.91**
71100 - Ending Fund Balance	4,753	60	436	-	**-**	-	-	-	**-**
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	4,753	60	436	-	**-**	-	-	-	**-**
Total Requirements by Function	26,916	24,206	25,490	28,638	**192.78**	26,531	-	-	**187.91**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Requirements by Object - 202 - Cafeteria Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
511210 - Classified - Represented	4,855	5,677	6,071	7,077	**176.78**	6,961	-	-	**174.91**
511220 - Non-Represented Staff	1,240	1,389	1,375	1,426	**14.00**	1,246	-	-	**12.00**
511420 - Directors/Program Admins	293	303	274	305	**2.00**	163	-	-	**1.00**
512300 - Temporary Misc - Licensed	-	-	-	291	**-**	126	-	-	**-**
512400 - Temporary Misc - Classified	10	239	106	-	**-**	-	-	-	**-**
513400 - Overtime Pay	80	93	69	99	**-**	71	-	-	**-**
513510 - Group Hlth Opt Out Lic	5	8	10	-	**-**	-	-	-	**-**
513520 - Group Hlth Opt Out Non Lic	46	51	47	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	6,528	7,759	7,951	9,197	**192.78**	8,567	-	-	**187.91**
521000 - PERS	1	-	-	376	**-**	353	-	-	**-**
521310 - PERS UAL	1,045	1,119	1,202	1,599	**-**	1,610	-	-	**-**
522000 - Social Security - FICA	497	590	604	704	**-**	655	-	-	**-**
523100 - Workers' Compensation	52	40	1	63	**-**	34	-	-	**-**
523200 - Unemployment Compensation	3	107	10	10	**-**	33	-	-	**-**
523300 - PFMLA	-	33	42	41	**-**	50	-	-	**-**
524100 - Group Health Insurance	1,709	1,691	1,969	3,657	**-**	3,779	-	-	**-**
524200 - Other Employer Paid Benefits	24	24	39	16	**-**	15	-	-	**-**
524300 - Retiree Health Insurance	32	33	30	43	**-**	40	-	-	**-**
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	3,362	3,637	3,896	6,509	**-**	6,570	-	-	**-**
531800 - Local Mtgs/Non-Instr Staff Dev	12	3	5	5	**-**	5	-	-	**-**
532200 - Repairs and Maintenance Svcs	25	4	2	25	**-**	10	-	-	**-**
532400 - Rentals	53	117	103	85	**-**	15	-	-	**-**
532900 - Other Property Services	165	230	225	200	**-**	100	-	-	**-**
534100 - Travel, Local in District	10	10	11	10	**-**	12	-	-	**-**
534200 - Travel, Out of District	9	13	2	1	**-**	1	-	-	**-**
535100 - Telephone	14	15	14	16	**-**	15	-	-	**-**
535300 - Postage	15	3	1	5	**-**	5	-	-	**-**
535400 - Advertising	13	14	2	7	**-**	5	-	-	**-**
535500 - Printing and Binding	28	22	8	5	**-**	5	-	-	**-**
538300 - Architect and Engineering Svcs	5	-	-	-	**-**	-	-	-	**-**
538940 - Professional Moving Services	1	1	1	1	**-**	1	-	-	**-**
538950 - Professional Health Care Svcs	-	-	1	1	**-**	1	-	-	**-**
538980 - Laundering Services	28	15	28	25	**-**	27	-	-	**-**
538990 - Non-Instr Pers/Professional Sv	141	210	118	200	**-**	100	-	-	**-**
Subtotal - 300 - PURCHASED SERVICES	519	658	520	585	**-**	301	-	-	**-**
541000 - Consumable Supplies	579	577	520	575	**-**	550	-	-	**-**
541270 - Food Inventory Adjustm-NS Only	(183)	211	125	-	**-**	-	-	-	**-**
541600 - Interdepartmental Charges	57	111	99	120	**-**	75	-	-	**-**
545100 - Purchased Food-NS Only	8,119	8,708	9,387	8,986	**-**	7,595	-	-	**-**
545300 - Donated Commodity -NS Only	1,768	1,288	1,596	1,491	**-**	1,596	-	-	**-**
546000 - Non-Consumable Supplies	-	-	-	10	**-**	10	-	-	**-**
547000 - Computer Software	122	122	122	123	**-**	129	-	-	**-**
548000 - Computer Equipment	72	6	4	10	**-**	10	-	-	**-**
Subtotal - 400 - SUPPLIES AND MATERIALS	10,534	11,023	11,853	11,315	**-**	9,965	-	-	**-**
552000 - Building Acquisition/Improvmnt	87	1	-	-	**-**	-	-	-	**-**
554100 - Initial and Addl Equipment	394	239	9	100	**-**	75	-	-	**-**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
554110 - Vehicles	-	-	-	-	**-**	180	-	-	**-**
555010 - Computers	-	33	-	10	**-**	10	-	-	**-**
Subtotal - 500 - CAPITAL OUTLAY	481	273	9	110	**-**	265	-	-	**-**
564000 - Dues and Fees	90	93	94	81	**-**	85	-	-	**-**
565500 - Judgmnts&Settlemnts Against	2	-	-	-	**-**	-	-	-	**-**
567100 - Permits	2	-	-	-	**-**	-	-	-	**-**
569000 - Grant Indirect Charges	646	703	730	841	**-**	778	-	-	**-**
Subtotal - Other Objects	740	797	824	922	**-**	863	-	-	**-**
376520 - Budgeted Ending Fund Balance	4,753	60	436	-	**-**	-	-	-	**-**
Subtotal - 376520 - Budgeted Ending Fund Balance	4,753	60	436	-	**-**	-	-	-	**-**
Total Requirements by Object	26,916	24,206	25,490	28,638	**192.78**	26,531	-	-	**187.91**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

GRANTS FUND (205)

This fund captures the resources and requirements for grants received by the District. The District actively pursues federal, state, local, and private grants to support projects in a variety of instruction and service areas. Most grant funded programs are operated to enable the District to achieve goals in situations that require supplementary or compensatory effort beyond what can be provided using General Fund support. Other grants supplement basic offerings of the District. All grants complement the primary mission of the District, which is to provide quality education to all students.

Fund 205 - Grants Fund Detail

Resources by Object - 205 - Grants Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
377000 - Fund Balance-Unres/Undes	(10,800)	(8,865)	709	-	-	-	-
Subtotal - Beginning Fund Balance	(10,800)	(8,865)	709	-	-	-	-
412000 - Rev-Local Gov't Not Districts	633	699	788	622	3,960	-	-
419200 - Contrib-Donation - Priv Source	-	25	951	2,180	1,596	-	-
419400 - Svc Provided-Oth Local Ed Agcy	15	51	6	-	200	-	-
419600 - Recovery PY Expenditure	(9)	-	42	-	-	-	-
419800 - Fees Charged to Grants	-	-	(2)	-	-	-	-
Subtotal - Other Revenue from Local Sources	639	775	1,786	2,802	5,756	-	-
421991 - City of Portland	-	-	234	-	12,593	-	-
422000 - Restricted Revenue	186	145	328	2,468	3,302	-	-
Subtotal - 2000 - REVENUE - INTERMEDIATE SOURCES	186	145	563	2,468	15,895	-	-
432990 - Restricted State Grants	50,731	36,167	48,291	29,752	34,391	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	50,731	36,167	48,291	29,752	34,391	-	-
442000 - Unrestr Rev-Fed Govt Thru St	44	49	88	83	70	-	-
442020 - Medicaid Reimb. Eligible K12	26	15	-	94	15	-	-
443000 - Restr Rev-Fed Govt Direct	9,885	11,825	9,532	10,429	10,741	-	-
445030 - Fed Reimburse-Fresh Fruit & Ve	-	-	29	-	-	-	-
445080 - Fed Grants- State Pass Thru	76,662	82,935	36,546	40,366	31,047	-	-
447000 - Fed Grants-Other Interm Agency	162	44	29	1,800	2,177	-	-
Subtotal - 4000 - REVENUE FROM FEDERAL SOURCES	86,778	94,867	46,225	52,772	44,050	-	-
452100 - Interfund Transfers	-	-	-	-	20	-	-
Subtotal - 5200 - INTERFUND TRANSFERS	-	-	-	-	20	-	-
Total Resources by Object	127,533	123,089	97,573	87,793	100,112	-	-

Requirements by Function - 205 - Grants Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
1111 - ELEMENTARY K-5	9,739	5,531	1,993	1,131	**11.07**	1,458	-	-	**14.58**
1113 - ELEMENTARY EXTRA CURRICULAR	-	248	609	-	**-**	212	-	-	**-**
1121 - MIDDLE SCHOOL PROGRAMS	3,131	2,472	1,637	1,265	**3.27**	857	-	-	**2.87**
1122 - MIDDLE SCHOOL EXTR CURRICULAR	2	35	166	5	**0.04**	325	-	-	**0.20**
1131 - HIGH SCHOOL PROGRAMS	6,710	5,240	4,212	415	**1.61**	173	-	-	**0.83**
1132 - HIGH SCHOOL EXTRA CURRICULAR	590	2	19	-	**-**	100	-	-	**-**
1140 - PRE KINDERGARTEN PROGRAMS	13,066	14,836	13,299	15,099	**139.29**	16,154	-	-	**127.54**
1100 - INSTRUCTIONAL OTHER	690	17	412	-	**-**	-	-	-	**-**
1220 - RESTRICTIVE PROGRAMS	7,847	6,081	2,432	9,703	**23.95**	9,578	-	-	**22.01**
1250 - LESS RESTRICTIVE PROGRAMS	11,781	12,792	13,847	14,146	**76.42**	13,721	-	-	**68.76**
1260 - TREATMENT AND HABILITATION	411	265	145	136	**1.00**	140	-	-	**1.00**
1271 - REMEDIATION	-	-	1,038	1,186	**7.25**	2,857	-	-	**13.30**
1272 - TITLE I A/D	3,023	2,182	2,102	2,129	**-**	-	-	-	**-**

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Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
1280 - ALTERNATIVE EDUCATION	7,730	6,731	5,073	3,835	**24.28**	3,688	-	-	**25.32**
1291 - ENGLISH LANGUAGE LEARNER	794	1,381	820	427	**1.11**	1,138	-	-	**2.89**
1292 - TEEN PARENT PROGRAMS	89	138	96	-	**-**	-	-	-	**-**
1293 - MIGRANT EDUCATION	164	142	126	2	**-**	-	-	-	**-**
1299 - OTHER SPECIAL PROGRAMS	763	774	627	1,226	**-**	518	-	-	**-**
1400 - SUMMER SCHOOL PROGRAMS	4,884	4,228	1,891	433	**-**	390	-	-	**-**
Subtotal - 1000 - INSTRUCTION	71,414	63,093	50,542	51,138	**289.28**	51,309	-	-	**279.29**
2110 - ATTENDANCE/SOCIAL WORK SVCS	3,515	4,083	3,689	3,542	**22.55**	2,879	-	-	**19.23**
2120 - GUIDANCE SERVICES	8,813	5,387	5,361	1,329	**4.74**	1,083	-	-	**5.91**
2130 - HEALTH SERVICES PROGRAMS	993	1,491	191	-	**-**	-	-	-	**-**
2140 - PSYCHOLOGICAL SERVICES	1,378	5,234	2,049	2,411	**15.36**	3,644	-	-	**20.83**
2150 - SPEECH PATHOLOGY/AUDIOLOGY SVC	1,782	1,422	1,749	1,886	**11.00**	1,825	-	-	**10.40**
2160 - OTHER STUDENT TREATMENT SVCS	955	780	158	294	**2.20**	451	-	-	**3.20**
2190 - SVC DIRECTION-STUDENT SUPPORT	7,884	9,425	8,856	9,963	**32.48**	9,217	-	-	**24.56**
2210 - IMPROVEMENT OF INSTRUCTION	3,709	3,970	1,802	2,554	**5.00**	772	-	-	**3.00**
2220 - EDUCATIONAL MEDIA SERVICES	533	460	369	110	**0.37**	124	-	-	**0.95**
2240 - INSTRUC STAFF DEVELOPMENT	10,868	11,530	10,035	4,522	**16.55**	4,895	-	-	**19.05**
2320 - EXECUTIVE ADMINISTRATION SVCS	442	1,447	320	481	**1.00**	400	-	-	**1.75**
2410 - OFFICE OF THE PRINCIPAL SVCS	6,268	4,390	4,896	3,021	**26.92**	3,397	-	-	**25.83**
2520 - FISCAL SERVICES	5,670	5,285	4,053	3,716	**-**	3,931	-	-	**-**
2540 - OPER/MAINTENANCE OF PLANT SVCS	544	481	128	9	**-**	285	-	-	**-**
2550 - STUDENT TRANSPORTATION SERVICE	(53)	149	125	-	**-**	512	-	-	**0.50**
2570 - INTERNAL SERVICES	-	4	3	-	**-**	-	-	-	**-**
2610 - DIRECTION OF CENTRAL SUPPORT	118	167	-	-	**-**	-	-	-	**-**
2620 - RESEARCH,DEVELOP,EVAL SVCS	755	490	548	50	**1.00**	-	-	-	**-**
2630 - INFORMATION SERVICES	130	103	7	71	**0.50**	329	-	-	**2.00**
2640 - STAFF SERVICES	402	32	19	4	**-**	-	-	-	**-**
2660 - TECHNOLOGY SERVICES	440	137	120	-	**-**	120	-	-	**-**
Subtotal - 2000 - SUPPORT SERVICES	55,147	56,466	44,477	33,964	**139.68**	33,864	-	-	**137.22**
3100 - FOOD SERVICES	180	421	99	-	**-**	-	-	-	**-**
3300 - COMMUNITY SVCS	9,494	2,353	2,341	2,691	**23.00**	2,783	-	-	**22.00**
Subtotal - 3000 - ENTERPRISE AND COMMUNITY SVCS	9,674	2,774	2,440	2,691	**23.00**	2,783	-	-	**22.00**
4150 - Bldg Acquis/Constr/Improv Svcs	164	46	-	-	**-**	12,156	-	-	**-**
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	164	46	-	-	**-**	12,156	-	-	**-**
71100 - Ending Fund Balance	(8,865)	709	114	-	**-**	-	-	-	**-**
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	(8,865)	709	114	-	**-**	-	-	-	**-**
Total Requirements by Function	127,533	123,089	97,573	87,793	**451.96**	100,112	-	-	**438.51**

Requirements by Object - 205 - Grants Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
511100 - Licensed Staff	31,750	31,014	26,243	21,289	**215.34**	21,658	-	-	**214.02**
511210 - Classified - Represented	13,171	12,827	10,495	8,538	**188.71**	8,546	-	-	**182.36**
511220 - Non-Represented Staff	4,035	3,645	3,425	2,079	**28.46**	2,163	-	-	**26.08**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
511310 - Administrators - Licensed	5,772	4,457	3,392	3,037	**19.45**	2,671	-	-	**16.05**
511420 - Directors/Program Admins	262	144	134	-	**-**	-	-	-	**-**
512100 - Substitutes - Licensed	923	935	938	667	**-**	765	-	-	**-**
512200 - Substitutes - Classified	32	43	31	505	**-**	183	-	-	**-**
512300 - Temporary Misc - Licensed	2,203	2,199	1,284	-	**-**	-	-	-	**-**
512400 - Temporary Misc - Classified	784	787	917	-	**-**	-	-	-	**-**
513100 - Extended Responsibility - LIC	254	277	263	25	**-**	177	-	-	**-**
513200 - Extended Responsibility - CLS	47	-	2	-	**-**	-	-	-	**-**
513300 - Extended Hours	4,629	4,711	2,076	1,335	**-**	815	-	-	**-**
513350 - PAT Overload Pay Stipend	2	33	-	-	**-**	-	-	-	**-**
513400 - Overtime Pay	161	349	111	-	**-**	12	-	-	**-**
513510 - Group Hlth Opt Out Lic	43	27	21	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	64,069	61,447	49,332	37,476	**451.96**	36,989	-	-	**438.51**
521000 - PERS	8	2	-	1,574	**-**	1,546	-	-	**-**
521310 - PERS UAL	10,196	9,389	7,649	6,517	**-**	6,950	-	-	**-**
522000 - Social Security - FICA	4,831	4,633	3,714	2,867	**-**	2,830	-	-	**-**
523100 - Workers' Compensation	509	353	(47)	255	**-**	144	-	-	**-**
523200 - Unemployment Compensation	3	676	65	37	**-**	144	-	-	**-**
523300 - PFMLA	-	248	260	169	**-**	218	-	-	**-**
524100 - Group Health Insurance	14,058	14,205	11,955	10,003	**-**	10,543	-	-	**-**
524200 - Other Employer Paid Benefits	101	98	80	67	**-**	67	-	-	**-**
524300 - Retiree Health Insurance	274	278	208	176	**-**	174	-	-	**-**
524530 - Early Retirement Benefits	82	175	71	60	**-**	56	-	-	**-**
524510 - PAT Union Tuition Reimbursemnt	-	2	-	-	**-**	-	-	-	**-**
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	30,061	30,059	23,955	21,726	**-**	22,671	-	-	**-**
531100 - Instructional Services	2,241	2,435	2,013	7,545	**-**	7,611	-	-	**-**
531200 - Instr Program Improvement Svcs	1,131	2,306	1,151	2,267	**-**	374	-	-	**-**
531300 - Student Services	81	187	159	4,402	**-**	4,578	-	-	**-**
531800 - Local Mtgs/Non-Instr Staff Dev	733	851	287	214	**-**	31	-	-	**-**
531810 - Non-Instr Dev Profess Dev Fds	-	-	-	77	**-**	-	-	-	**-**
531900 - Other Instr Prof/Tech Svcs	9,863	3,794	5,555	4,453	**-**	5,128	-	-	**-**
532100 - Cleaning Services	-	1	-	-	**-**	-	-	-	**-**
532200 - Repairs and Maintenance Svcs	126	128	35	23	**-**	64	-	-	**-**
532400 - Rentals	133	184	2	-	**-**	-	-	-	**-**
532900 - Other Property Services	341	293	61	-	**-**	4	-	-	**-**
533110 - Reimb - School Bus	-	72	-	-	**-**	-	-	-	**-**
533120 - Reimb - Taxi Cab	(25)	113	111	-	**-**	-	-	-	**-**
533140 - Reimb - Tri-Met	5	-	-	-	**-**	-	-	-	**-**
533150 - Reimb - Field Trips	37	-	-	-	**-**	67	-	-	**-**
533200 - Non-Reimb Student Transport	1,042	850	448	79	**-**	459	-	-	**-**
534100 - Travel, Local in District	170	223	210	272	**-**	244	-	-	**-**
534200 - Travel, Out of District	989	448	348	44	**-**	498	-	-	**-**
534300 - Travel, Student Activities	310	117	75	24	**-**	5	-	-	**-**
534901 - Student Academic Transport	3	11	-	115	**-**	2	-	-	**-**
535100 - Telephone	1,322	101	77	98	**-**	44	-	-	**-**
535300 - Postage	12	12	6	-	**-**	2	-	-	**-**
535400 - Advertising	75	4	1	-	**-**	1	-	-	**-**

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Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
535500 - Printing and Binding	286	71	63	36	-	41	-	-	-
536000 - Charter Schools	859	678	349	-	-	-	-	-	-
537410 - Tuition - Fees College Credit	23	34	37	-	-	-	-	-	-
538300 - Architect and Engineering Svcs	84	-	20	-	-	-	-	-	-
538910 - Security Services	-	(176)	-	-	-	-	-	-	-
538940 - Professional Moving Services	25	97	51	-	-	20	-	-	-
538950 - Professional Health Care Svcs	165	125	188	-	-	-	-	-	-
538960 - Professional Child Care Svcs	89	166	96	-	-	-	-	-	-
538970 - Graphic Arts Services	46	36	-	-	-	-	-	-	-
538980 - Laundering Services	52	56	61	-	-	80	-	-	-
538990 - Non-Instr Pers/Professional Sv	4,710	4,693	1,794	689	-	13,166	-	-	-
538995 - Meal Services	14	144	-	-	-	-	-	-	-
539100 - Pass Through	-	8	20	-	-	-	-	-	-
Subtotal - 300 - PURCHASED SERVICES	24,941	18,064	13,219	20,336	-	32,420	-	-	-
541000 - Consumable Supplies	4,319	3,526	2,459	3,965	-	3,528	-	-	-
541325 - Gas	38	24	39	-	-	-	-	-	-
541400 - Maintenance Materials	-	1	-	-	-	-	-	-	-
541600 - Interdepartmental Charges	13	12	4	-	-	-	-	-	-
542100 - Textbook Expansion	453	259	319	-	-	6	-	-	-
542200 - Textbook Adoption	26	-	-	-	-	-	-	-	-
542300 - Textbook Replacement	-	-	1	-	-	5	-	-	-
543000 - Library Books	436	97	56	-	-	28	-	-	-
544000 - Periodicals	1	4	-	-	-	-	-	-	-
544100 - Online Periodical Subscription	73	2	5	-	-	-	-	-	-
545100 - Purchased Food-NS Only	135	-	-	-	-	-	-	-	-
546000 - Non-Consumable Supplies	849	1,320	1,624	104	-	77	-	-	-
546100 - Minor Equipment - Tagged	616	70	216	110	-	55	-	-	-
547000 - Computer Software	965	1,119	1,250	204	-	235	-	-	-
548000 - Computer Equipment	2,071	597	410	72	-	23	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	9,993	7,031	6,385	4,456	-	3,958	-	-	-
552000 - Building Acquisition/Improvmnt	373	44	50	-	-	-	-	-	-
553000 - Improvements - Not Buildings	62	-	3	-	-	-	-	-	-
554100 - Initial and Addl Equipment	331	137	181	70	-	20	-	-	-
554110 - Vehicles	-	-	108	-	-	-	-	-	-
555010 - Computers	152	42	1	-	-	3	-	-	-
555020 - Printers	-	-	5	-	-	-	-	-	-
555090 - Misc Other Technology	45	-	7	-	-	5	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	963	223	355	70	-	28	-	-	-
561000 - Redemption of Principal	507	-	-	-	-	-	-	-	-
562000 - Interest	3	-	-	-	-	-	-	-	-
564000 - Dues and Fees	176	271	161	13	-	99	-	-	-
565500 - Judgmnts&Settlemnts Against	2	-	-	-	-	-	-	-	-
567100 - Permits	14	-	-	-	-	-	-	-	-
569000 - Grant Indirect Charges	5,670	5,285	4,053	3,716	-	3,947	-	-	-
Subtotal - Other Objects	6,371	5,556	4,213	3,729	-	4,046	-	-	-
376520 - Budgeted Ending Fund Balance	(8,865)	709	114	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	(8,865)	709	114	-	-	-	-	-	-
Total Requirements by Object	127,533	123,089	97,573	87,793	**451.96**	100,112	-	-	**438.51**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

PERS RATE STABILIZATION RESERVE FUND (225)

The Public Employees Retirement System (PERS) Rate Stabilization Reserve Fund accounts for the reserve funds needed to mitigate the budgetary impact of significant employer personnel benefit rate fluctuations when they occur in PERS UAL or PERS charges.

The resources of the fund are Beginning Balance from the previous year's unspent fund balance and interfund transfers from the General Fund based upon estimated needs as determined by calculations provided by staff and financial consultants. Beginning in fiscal year 2010-11, 0.11% of current year permanent rate property taxes are dedicated to this fund (Board Resolution 4471, June 27, 2011).

Requirements of the fund are recorded as interfund transfers to the General Fund in an amount determined adequate to manage rate increases. In 2026-27, an interfund transfer is planned to the General Fund to offset the costs of the increasing PERS rates. Disbursements from this fund are made in accordance with Board Resolution No. 2679.

Fund 225 - PERS Rate Stabilization Reserve Fund Detail

Resources by Object - 225 - PERS Rate Stabilization Reserv (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	22,889	-	-	-
377000 - Fund Balance-Unres/Undes	19,389	20,209	21,573	-	-	-	-
Subtotal - Beginning Fund Balance	19,389	20,209	21,573	22,889	-	-	-
411111 - Current-Multnomah Co	308	335	343	335	353	-	-
411113 - Current-Washington Co	2	2	2	2	2	-	-
411311 - CY Gap Rate Taxes - Mult Co	32	35	36	36	37	-	-
Subtotal - Current Year Property Taxes other than Local Option	343	373	382	372	393	-	-
415100 - Interest on Investments	477	991	869	700	-	-	-
Subtotal - Other Revenue from Local Sources	477	991	869	700	-	-	-
Total Resources by Object	20,209	21,573	22,824	23,962	394	-	-

Requirements by Function - 225 - PERS Rate Stabilization Reserv (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
52100 - Fund Transfers	-	-	-	23,962	-	394	-	-	-
Subtotal - 5200 - TRANSFERS OF FUNDS	-	-	-	23,962	-	394	-	-	-
71100 - Ending Fund Balance	20,209	21,573	22,824	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	20,209	21,573	22,824	-	-	-	-	-	-
Total Requirements by Function	20,209	21,573	22,824	23,962	-	394	-	-	-

Requirements by Object - 225 - PERS Rate Stabilization Reserv (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
571000 - Transfers to Other Funds	-	-	-	23,962	-	394	-	-	-
Subtotal - 700 - TRANSFERS	-	-	-	23,962	-	394	-	-	-
376520 - Budgeted Ending Fund Balance	20,209	21,573	22,824	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	20,209	21,573	22,824	-	-	-	-	-	-
Total Requirements by Object	20,209	21,573	22,824	23,962	-	394	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

STUDENT INVESTMENT ACCOUNT FUND (251)

The State of Oregon adopted a historic investment of funds (HB 3427) to Oregon schools in 2020-21, the Student Success Act (SSA). This act marks a turning point for education in Oregon. When fully implemented, the State will see an additional $1 billion investment in schools each year, providing new opportunities for every student in Oregon.

The Student Success Act invests in our students in three ways:

- 50% - Student Investment Account (dedicated for kindergarten through twelfth grade)
- 20% - Early Learning Account
- 30% - Statewide Education Initiatives

The Student Investment Account is non-competitive grant money for all Oregon school districts and eligible charter schools.

This funding has two purposes:

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

Fund 251 - Student Investment Account Fund Detail

Resources by Object - 251 - Student Investment Account (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
432990 - Restricted State Grants	37,621	40,408	48,606	45,163	45,464	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	37,621	40,408	48,606	45,163	45,464	-	-
Total Resources by Object	37,621	40,408	48,606	45,163	45,464	-	-

Requirements by Function - 251 - Student Investment Account (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
1111 - ELEMENTARY K-5	4,659	7,055	2,913	1,972	**25.39**	2,259	-	-	**25.60**
1121 - MIDDLE SCHOOL PROGRAMS	4,146	3,846	478	315	**1.92**	236	-	-	**1.60**
1122 - MIDDLE SCHOOL EXTR CURRICULAR	18	47	-	-	**-**	103	-	-	**0.63**
1131 - HIGH SCHOOL PROGRAMS	373	654	284	-	**-**	-	-	-	**-**
1140 - PRE KINDERGARTEN PROGRAMS	-	-	-	60	**-**	-	-	-	**-**
1220 - RESTRICTIVE PROGRAMS	597	135	30	-	**-**	75	-	-	**0.94**
1250 - LESS RESTRICTIVE PROGRAMS	82	133	1,739	1,240	**14.63**	7,264	-	-	**85.48**
1260 - TREATMENT AND HABILITATION	192	142	25	170	**1.00**	174	-	-	**1.00**
1271 - REMEDIATION	-	10	8,737	8,448	**54.17**	6,381	-	-	**38.99**
1280 - ALTERNATIVE EDUCATION	2,467	2,519	1,571	2,443	**2.50**	1,904	-	-	**1.00**
1291 - ENGLISH LANGUAGE LEARNER	-	26	40	34	**0.21**	-	-	-	**-**
1299 - OTHER SPECIAL PROGRAMS	121	135	236	132	**1.75**	200	-	-	**2.63**
1400 - SUMMER SCHOOL PROGRAMS	1	328	2,250	-	**-**	364	-	-	**4.34**
Subtotal - 1000 - INSTRUCTION	12,656	15,030	18,301	14,815	**101.58**	18,962	-	-	**162.20**
2110 - ATTENDANCE/SOCIAL WORK SVCS	4,491	5,722	5,043	5,840	**37.01**	7,473	-	-	**47.86**
2120 - GUIDANCE SERVICES	3,935	4,149	2,352	610	**4.00**	2,470	-	-	**11.71**
2130 - HEALTH SERVICES PROGRAMS	1	-	-	-	**-**	-	-	-	**-**
2140 - PSYCHOLOGICAL SERVICES	357	525	699	785	**5.00**	1,068	-	-	**6.80**
2160 - OTHER STUDENT TREATMENT SVCS	419	444	397	480	**3.00**	353	-	-	**2.00**
2190 - SVC DIRECTION-STUDENT SUPPORT	4,828	1,875	4,299	4,863	**2.22**	6,079	-	-	**1.94**
2210 - IMPROVEMENT OF INSTRUCTION	1,753	594	606	1,150	**-**	276	-	-	**1.00**
2220 - EDUCATIONAL MEDIA SERVICES	26	30	-	-	**-**	-	-	-	**-**
2240 - INSTRUC STAFF DEVELOPMENT	6,795	7,186	14,338	10,219	**61.59**	7,548	-	-	**38.35**
2320 - EXECUTIVE ADMINISTRATION SVCS	198	1,076	41	-	**-**	-	-	-	**-**
2410 - OFFICE OF THE PRINCIPAL SVCS	413	1,459	852	527	**4.20**	417	-	-	**2.98**
2520 - FISCAL SERVICES	500	-	77	500	**1.00**	500	-	-	**-**
2620 - RESEARCH,DEVELOP,EVAL SVCS	-	183	1	-	**-**	-	-	-	**-**
2630 - INFORMATION SERVICES	-	-	174	-	**-**	-	-	-	**-**
2640 - STAFF SERVICES	34	48	20	-	**-**	208	-	-	**-**
2660 - TECHNOLOGY SERVICES	732	713	(3)	-	**-**	-	-	-	**-**
2690 - OTHER SUPPORT SERVICES	9	-	-	75	**-**	-	-	-	**-**
Subtotal - 2000 - SUPPORT SERVICES	24,490	24,003	28,896	25,048	**118.02**	26,392	-	-	**112.65**
3300 - COMMUNITY SVCS	474	1,374	1,408	5,300	**-**	110	-	-	**-**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Subtotal - 3000 - ENTERPRISE AND COMMUNITY SVCS	474	1,374	1,408	5,300	-	110	-	-	-
Total Requirements by Function	37,621	40,408	48,606	45,163	**219.60**	45,464	-	-	**274.85**

Requirements by Object - 251 - Student Investment Account (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
511100 - Licensed Staff	16,910	18,520	19,083	17,287	**168.35**	15,475	-	-	**148.73**
511210 - Classified - Represented	359	1,241	2,757	1,756	**42.32**	5,270	-	-	**118.69**
511220 - Non-Represented Staff	485	1,143	731	718	**8.92**	427	-	-	**5.18**
511310 - Administrators - Licensed	255	319	195	-	-	211	-	-	**1.25**
511420 - Directors/Program Admins	-	-	-	-	-	155	-	-	**1.00**
512100 - Substitutes - Licensed	8	45	80	-	-	467	-	-	-
512300 - Temporary Misc - Licensed	-	117	753	-	-	-	-	-	-
512400 - Temporary Misc - Classified	2	22	84	-	-	-	-	-	-
513100 - Extended Responsibility - LIC	68	50	61	-	-	36	-	-	-
513200 - Extended Responsibility - CLS	-	-	12	-	-	-	-	-	-
513300 - Extended Hours	888	496	1,068	-	-	496	-	-	-
513400 - Overtime Pay	15	30	14	-	-	-	-	-	-
513510 - Group Hlth Opt Out Lic	6	9	5	-	-	-	-	-	-
Subtotal - 100 - SALARIES	18,997	21,992	24,843	19,761	**219.60**	22,538	-	-	**274.85**
521000 - PERS	1	1	-	830	-	942	-	-	-
521310 - PERS UAL	3,091	3,465	3,870	3,437	-	4,235	-	-	-
522000 - Social Security - FICA	1,429	1,649	1,867	1,512	-	1,724	-	-	-
523100 - Workers' Compensation	157	124	(29)	134	-	88	-	-	-
523200 - Unemployment Compensation	(1)	250	29	20	-	88	-	-	-
523300 - PFMLA	-	96	125	89	-	133	-	-	-
524100 - Group Health Insurance	4,078	5,028	5,751	5,092	-	6,674	-	-	-
524200 - Other Employer Paid Benefits	18	32	26	36	-	40	-	-	-
524300 - Retiree Health Insurance	77	100	104	93	-	106	-	-	-
524530 - Early Retirement Benefits	23	36	46	32	-	34	-	-	-
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	8,874	10,782	11,790	11,274	-	14,063	-	-	-
531100 - Instructional Services	809	807	52	1,578	-	170	-	-	-
531200 - Instr Program Improvement Svcs	413	256	110	900	-	-	-	-	-
531300 - Student Services	1	-	567	4,704	-	614	-	-	-
531800 - Local Mtgs/Non-Instr Staff Dev	103	128	489	-	-	-	-	-	-
531900 - Other Instr Prof/Tech Svcs	72	229	42	160	-	-	-	-	-
533200 - Non-Reimb Student Transport	4	1	602	-	-	-	-	-	-
534100 - Travel, Local in District	-	1	1	-	-	-	-	-	-
534200 - Travel, Out of District	9	16	7	-	-	145	-	-	-
534300 - Travel, Student Activities	-	3	1	-	-	-	-	-	-
535100 - Telephone	1	1	6	-	-	-	-	-	-
535500 - Printing and Binding	90	7	1	-	-	-	-	-	-
536000 - Charter Schools	1,098	1,253	1,317	423	-	1,349	-	-	-
537410 - Tuition - Fees College Credit	-	-	(1)	-	-	-	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
538990 - Non-Instr Pers/Professional Sv	5,889	4,246	7,838	5,343	-	5,800	-	-	-
Subtotal - 300 - PURCHASED SERVICES	8,490	6,950	11,029	13,108	-	8,078	-	-	-
541000 - Consumable Supplies	128	226	216	395	-	175	-	-	-
541600 - Interdepartmental Charges	2	4	2	-	-	-	-	-	-
542100 - Textbook Expansion	1	-	-	150	-	-	-	-	-
542200 - Textbook Adoption	169	-	-	-	-	-	-	-	-
543000 - Library Books	24	-	2	-	-	-	-	-	-
546000 - Non-Consumable Supplies	198	412	670	-	-	110	-	-	-
546100 - Minor Equipment - Tagged	13	-	-	-	-	-	-	-	-
547000 - Computer Software	198	24	43	140	-	-	-	-	-
548000 - Computer Equipment	7	-	8	-	-	-	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	742	666	941	685	-	285	-	-	-
564000 - Dues and Fees	18	18	2	-	-	-	-	-	-
569000 - Grant Indirect Charges	500	-	-	336	-	500	-	-	-
Subtotal - Other Objects	518	18	2	336	-	500	-	-	-
Total Requirements by Object	37,621	40,408	48,606	45,163	**219.60**	45,464	-	-	**274.85**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

MEASURE 98 - HIGH SCHOOL SUCCESS FUND (252)

High School Success is a fund initiated by ballot Measure 98 in November 2016. The intent of High School Success is to improve student progress toward graduation, increase graduation rates, and improve high school graduates' readiness for college and career. All High School Success recipients must meet eligibility requirements in order to receive and spend funds. Eligibility requirements ensure schools and districts establish systems designed to collect data and begin the process of improving data literacy. PPS has a comprehensive High School Success Plan for the purpose of implementing this measure across the identified priorities: https://ccr.pps.net/more-resources/high-school-success-plan.

Funding is provided to establish or expand programs in three specific areas:

- Career and Technical Education
- College-Level Education Opportunities
- Dropout Prevention

This fund was formally created as part of the District's 2025-26 budget process.

Fund 252 - Measure 98 High School Success Fund Detail

Resources by Object - 252 - Measure 98 High School Success (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
432990 - Restricted State Grants	-	-	-	13,163	13,139	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	-	-	-	13,163	13,139	-	-
Total Resources by Object	-	-	-	13,163	13,139	-	-

Requirements by Function - 252 - Measure 98 High School Success (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
1121 - MIDDLE SCHOOL PROGRAMS	-	-	-	179	-	179	-	-	-
1122 - MIDDLE SCHOOL EXTR CURRICULAR	-	-	-	-	-	15	-	-	-
1131 - HIGH SCHOOL PROGRAMS	-	-	-	3,186	**19.23**	4,025	-	-	**23.96**
1132 - HIGH SCHOOL EXTRA CURRICULAR	-	-	-	-	-	10	-	-	-
1280 - ALTERNATIVE EDUCATION	-	-	-	250	**2.06**	511	-	-	**1.00**
1291 - ENGLISH LANGUAGE LEARNER	-	-	-	24	**0.17**	9	-	-	**0.06**
1400 - SUMMER SCHOOL PROGRAMS	-	-	-	26	-	26	-	-	-
Subtotal - 1000 - INSTRUCTION	-	-	-	3,664	**21.46**	4,775	-	-	**25.01**
2110 - ATTENDANCE/SOCIAL WORK SVCS	-	-	-	29	-	329	-	-	-
2120 - GUIDANCE SERVICES	-	-	-	2,486	**11.25**	1,771	-	-	**6.50**
2210 - IMPROVEMENT OF INSTRUCTION	-	-	-	119	-	305	-	-	-
2220 - EDUCATIONAL MEDIA SERVICES	-	-	-	-	-	170	-	-	**1.00**
2240 - INSTRUC STAFF DEVELOPMENT	-	-	-	4,823	**18.34**	4,136	-	-	**19.82**
2410 - OFFICE OF THE PRINCIPAL SVCS	-	-	-	1,535	**12.25**	1,148	-	-	**8.75**
2520 - FISCAL SERVICES	-	-	-	506	-	505	-	-	-
Subtotal - 2000 - SUPPORT SERVICES	-	-	-	9,499	**41.84**	8,364	-	-	**36.07**
Total Requirements by Function	-	-	-	13,163	**63.30**	13,139	-	-	**61.09**

Requirements by Object - 252 - Measure 98 High School Success (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
511100 - Licensed Staff	-	-	-	3,926	**38.80**	4,536	-	-	**43.84**
511210 - Classified - Represented	-	-	-	1,059	**11.50**	524	-	-	**7.25**
511220 - Non-Represented Staff	-	-	-	1,033	**13.00**	845	-	-	**10.00**
512100 - Substitutes - Licensed	-	-	-	-	-	177	-	-	-
513300 - Extended Hours	-	-	-	435	-	587	-	-	-
Subtotal - 100 - SALARIES	-	-	-	6,452	**63.30**	6,668	-	-	**61.09**
521000 - PERS	-	-	-	271	-	279	-	-	-
521310 - PERS UAL	-	-	-	1,122	-	1,253	-	-	-
522000 - Social Security - FICA	-	-	-	494	-	510	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
523100 - Workers' Compensation	-	-	-	44	-	26	-	-	-
523200 - Unemployment Compensation	-	-	-	6	-	26	-	-	-
523300 - PFMLA	-	-	-	29	-	39	-	-	-
524100 - Group Health Insurance	-	-	-	1,422	-	1,496	-	-	-
524200 - Other Employer Paid Benefits	-	-	-	12	-	12	-	-	-
524300 - Retiree Health Insurance	-	-	-	30	-	31	-	-	-
524530 - Early Retirement Benefits	-	-	-	10	-	10	-	-	-
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	-	-	-	3,440	-	3,682	-	-	-
531100 - Instructional Services	-	-	-	466	-	433	-	-	-
531300 - Student Services	-	-	-	200	-	430	-	-	-
531800 - Local Mtgs/Non-Instr Staff Dev	-	-	-	-	-	14	-	-	-
531900 - Other Instr Prof/Tech Svcs	-	-	-	-	-	50	-	-	-
533200 - Non-Reimb Student Transport	-	-	-	62	-	41	-	-	-
534200 - Travel, Out of District	-	-	-	-	-	2	-	-	-
538990 - Non-Instr Pers/Professional Sv	-	-	-	1,062	-	-	-	-	-
Subtotal - 300 - PURCHASED SERVICES	-	-	-	1,789	-	970	-	-	-
541000 - Consumable Supplies	-	-	-	284	-	192	-	-	-
542100 - Textbook Expansion	-	-	-	-	-	175	-	-	-
546000 - Non-Consumable Supplies	-	-	-	231	-	311	-	-	-
547000 - Computer Software	-	-	-	310	-	261	-	-	-
548000 - Computer Equipment	-	-	-	150	-	347	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	-	-	-	975	-	1,286	-	-	-
559000 - Other Capital Outlay	-	-	-	-	-	10	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	-	-	-	-	-	10	-	-	-
564000 - Dues and Fees	-	-	-	-	-	17	-	-	-
569000 - Grant Indirect Charges	-	-	-	506	-	505	-	-	-
Subtotal - Other Objects	-	-	-	506	-	522	-	-	-
Total Requirements by Object	-	-	-	13,163	**63.30**	13,139	-	-	**61.09**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

DEDICATED RESOURCE FUND (299)

The Dedicated Resource Fund accounts for revenues from specific sources that are legally restricted to specific purposes or are designated for specific uses.

Resources are generated by a variety of sources such as tuition, donations, sales and royalties and Third Party Medical Reimbursement. These resources fund multiple programs and initiatives across the District.

Fund 299 - Dedicated Resource Fund Detail

Resources by Object - 299 - Dedicated Resource Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	10,752	18,974	-	-
377000 - Fund Balance-Unres/Undes	14,764	15,710	17,927	-	-	-	-
Subtotal - Beginning Fund Balance	14,764	15,710	17,927	10,752	18,974	-	-
412000 - Rev-Local Gov't Not Districts	62	-	-	-	-	-	-
413110 - Regular Day Tuition	316	292	366	-	-	-	-
413310 - Summer School Tuition	1	1	1	-	-	-	-
419120 - Community Parking Fees	-	-	7	-	-	-	-
419200 - Contrib-Donation - Priv Source	7,279	8,987	5,919	1,560	2,884	-	-
419300 - Rent-Lease Buses/Garage to Con	-	-	28	-	-	-	-
419400 - Svc Provided-Oth Local Ed Agcy	82	92	98	-	-	-	-
419410 - Svc Provided-Oth Dist in State	1,288	1,330	1,673	3,717	3,309	-	-
419600 - Recovery PY Expenditure	-	(10)	-	-	-	-	-
419910 - Miscellaneous	11	-	-	-	-	-	-
419945 - E-RATE PRIORITY 1	1,165	464	-	-	1,040	-	-
419946 - E-RATE PRIORITY 2	1,197	-	799	-	2,068	-	-
419950 - Sales, Royalties and Events	45	65	49	57	23	-	-
Subtotal - Other Revenue from Local Sources	11,447	11,222	8,941	5,334	9,323	-	-
422000 - Restricted Revenue	-	187	100	-	-	-	-
Subtotal - 2000 - REVENUE - INTERMEDIATE SOURCES	-	187	100	-	-	-	-
Total Resources by Object	26,210	27,118	26,968	16,086	28,297	-	-

Requirements by Function - 299 - Dedicated Resource Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
1111 - ELEMENTARY K-5	1,652	1,188	1,620	177	**-**	74	-	-	**-**
1113 - ELEMENTARY EXTRA CURRICULAR	19	15	9	-	**-**	576	-	-	**-**
1121 - MIDDLE SCHOOL PROGRAMS	511	215	474	33	**-**	60	-	-	**-**
1122 - MIDDLE SCHOOL EXTR CURRICULAR	-	-	2	-	**-**	81	-	-	**-**
1131 - HIGH SCHOOL PROGRAMS	683	585	810	277	**0.88**	1,525	-	-	**0.42**
1132 - HIGH SCHOOL EXTRA CURRICULAR	60	1,224	451	123	**-**	32	-	-	**-**
1140 - PRE KINDERGARTEN PROGRAMS	-	-	-	3	**-**	32	-	-	**-**
1220 - RESTRICTIVE PROGRAMS	85	81	50	2,501	**-**	4,009	-	-	**-**
1250 - LESS RESTRICTIVE PROGRAMS	1,656	1,279	722	3,289	**29.88**	3,606	-	-	**29.25**
1271 - REMEDIATION	-	-	177	-	**-**	-	-	-	**-**
1272 - TITLE I A/D	-	33	-	-	**-**	-	-	-	**-**
1280 - ALTERNATIVE EDUCATION	43	42	21	28	**-**	469	-	-	**-**
1291 - ENGLISH LANGUAGE LEARNER	10	-	48	-	**-**	-	-	-	**-**
1292 - TEEN PARENT PROGRAMS	-	-	-	-	**-**	46	-	-	**-**
1400 - SUMMER SCHOOL PROGRAMS	28	19	38	685	**-**	690	-	-	**-**
Subtotal - 1000 - INSTRUCTION	4,748	4,682	4,422	7,116	**30.76**	11,199	-	-	**29.67**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
2110 - ATTENDANCE/SOCIAL WORK SVCS	20	114	276	125	**1.00**	139	-	-	**1.00**
2120 - GUIDANCE SERVICES	1,825	575	693	264	**1.52**	1,565	-	-	**2.00**
2130 - HEALTH SERVICES PROGRAMS	-	6	3	-	**-**	46	-	-	**-**
2150 - SPEECH PATHOLOGY/AUDIOLOGY SVC	139	29	6	168	**1.00**	199	-	-	**1.00**
2190 - SVC DIRECTION-STUDENT SUPPORT	100	152	298	981	**1.00**	1,758	-	-	**1.00**
2210 - IMPROVEMENT OF INSTRUCTION	143	206	345	782	**1.00**	709	-	-	**1.00**
2220 - EDUCATIONAL MEDIA SERVICES	275	174	129	2	**-**	70	-	-	**-**
2240 - INSTRUC STAFF DEVELOPMENT	1,299	1,613	1,718	2,334	**1.00**	2,081	-	-	**0.50**
2320 - EXECUTIVE ADMINISTRATION SVCS	26	1	96	253	**-**	194	-	-	**-**
2410 - OFFICE OF THE PRINCIPAL SVCS	494	515	574	-	**-**	355	-	-	**1.30**
2520 - FISCAL SERVICES	132	132	118	247	**-**	287	-	-	**-**
2540 - OPER/MAINTENANCE OF PLANT SVCS	-	25	138	-	**-**	5	-	-	**-**
2550 - STUDENT TRANSPORTATION SERVICE	222	-	691	-	**-**	777	-	-	**-**
2630 - INFORMATION SERVICES	93	-	-	-	**-**	-	-	-	**-**
2640 - STAFF SERVICES	-	-	1	-	**-**	-	-	-	**-**
2660 - TECHNOLOGY SERVICES	888	399	1,204	3,000	**-**	7,908	-	-	**-**
Subtotal - 2000 - SUPPORT SERVICES	5,655	3,941	6,289	8,156	**6.52**	16,092	-	-	**7.80**
3100 - FOOD SERVICES	27	7	12	-	**-**	5	-	-	**-**
3300 - COMMUNITY SVCS	71	407	62	763	**-**	900	-	-	**-**
Subtotal - 3000 - ENTERPRISE AND COMMUNITY SVCS	98	414	74	763	**-**	905	-	-	**-**
4150 - Bldg Acquis/Constr/Improv Svcs	-	155	-	50	**-**	100	-	-	**-**
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	-	155	-	50	**-**	100	-	-	**-**
71100 - Ending Fund Balance	15,710	17,927	16,183	-	**-**	-	-	-	**-**
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	15,710	17,927	16,183	-	**-**	-	-	-	**-**
Total Requirements by Function	26,210	27,118	26,968	16,086	**37.28**	28,297	-	-	**37.47**

Requirements by Object - 299 - Dedicated Resource Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
511100 - Licensed Staff	1,534	876	1,331	996	**9.88**	1,078	-	-	**10.92**
511210 - Classified - Represented	1,498	1,224	1,307	1,332	**24.38**	1,246	-	-	**21.25**
511220 - Non-Represented Staff	1,245	403	332	310	**3.02**	367	-	-	**3.80**
511310 - Administrators - Licensed	68	72	241	-	**-**	243	-	-	**1.50**
512100 - Substitutes - Licensed	42	53	62	-	**-**	19	-	-	**-**
512200 - Substitutes - Classified	1	-	-	-	**-**	10	-	-	**-**
512300 - Temporary Misc - Licensed	9	21	25	-	**-**	-	-	-	**-**
512400 - Temporary Misc - Classified	35	36	38	-	**-**	-	-	-	**-**
513100 - Extended Responsibility - LIC	94	46	69	20	**-**	9	-	-	**-**
513200 - Extended Responsibility - CLS	-	911	316	-	**-**	7	-	-	**-**
513300 - Extended Hours	97	92	51	-	**-**	536	-	-	**-**
513350 - PAT Overload Pay Stipend	1	-	-	100	**-**	-	-	-	**-**
513400 - Overtime Pay	13	23	11	-	**-**	25	-	-	**-**
513510 - Group Hlth Opt Out Lic	2	5	-	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	4,639	3,762	3,782	2,759	**37.28**	3,539	-	-	**37.47**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
521000 - PERS	-	-	-	116	-	148	-	-	-
521310 - PERS UAL	545	575	575	480	-	665	-	-	-
522000 - Social Security - FICA	428	284	284	211	-	271	-	-	-
523100 - Workers' Compensation	101	22	(2)	19	-	14	-	-	-
523200 - Unemployment Compensation	8	38	8	3	-	14	-	-	-
523300 - PFMLA	-	16	20	12	-	21	-	-	-
524100 - Group Health Insurance	939	687	904	853	-	916	-	-	-
524200 - Other Employer Paid Benefits	9	2	6	5	-	6	-	-	-
524300 - Retiree Health Insurance	17	18	14	13	-	17	-	-	-
524530 - Early Retirement Benefits	11	6	5	4	-	5	-	-	-
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	2,058	1,647	1,814	1,716	-	2,076	-	-	-
531100 - Instructional Services	34	43	62	2,400	-	4,296	-	-	-
531200 - Instr Program Improvement Svcs	1,017	1,329	1,050	600	-	777	-	-	-
531300 - Student Services	-	-	-	750	-	1,422	-	-	-
531800 - Local Mtgs/Non-Instr Staff Dev	130	24	21	-	-	16	-	-	-
531900 - Other Instr Prof/Tech Svcs	79	139	528	1,953	-	1,915	-	-	-
532200 - Repairs and Maintenance Svcs	33	35	107	-	-	25	-	-	-
532400 - Rentals	4	2	4	50	-	-	-	-	-
532900 - Other Property Services	-	17	102	-	-	-	-	-	-
533150 - Reimb - Field Trips	5	-	-	-	-	-	-	-	-
533200 - Non-Reimb Student Transport	25	22	58	7	-	13	-	-	-
534100 - Travel, Local in District	7	3	11	5	-	5	-	-	-
534200 - Travel, Out of District	68	77	75	300	-	328	-	-	-
534300 - Travel, Student Activities	30	7	32	10	-	177	-	-	-
534901 - Student Academic Transport	-	-	-	-	-	22	-	-	-
535100 - Telephone	2	7	1	-	-	4	-	-	-
535500 - Printing and Binding	6	7	10	-	-	-	-	-	-
535990 - Wide Area Network/Misc	-	-	-	1,600	-	2,340	-	-	-
537410 - Tuition - Fees College Credit	271	568	274	212	-	232	-	-	-
538940 - Professional Moving Services	3	-	1	-	-	-	-	-	-
538960 - Professional Child Care Svcs	1	-	-	-	-	-	-	-	-
538970 - Graphic Arts Services	10	-	-	-	-	13	-	-	-
538990 - Non-Instr Pers/Professional Sv	337	383	599	115	-	243	-	-	-
539100 - Pass Through	-	71	13	-	-	-	-	-	-
Subtotal - 300 - PURCHASED SERVICES	2,060	2,734	2,949	8,004	-	11,826	-	-	-
541000 - Consumable Supplies	595	447	534	1,675	-	3,520	-	-	-
541310 - Auto Parts, Batteries	-	-	1	-	-	-	-	-	-
541600 - Interdepartmental Charges	2	3	2	-	-	4	-	-	-
542100 - Textbook Expansion	6	-	-	-	-	-	-	-	-
543000 - Library Books	5	8	3	-	-	-	-	-	-
544000 - Periodicals	2	1	1	1	-	1	-	-	-
546000 - Non-Consumable Supplies	138	123	105	110	-	264	-	-	-
546100 - Minor Equipment - Tagged	5	9	2	2	-	-	-	-	-
547000 - Computer Software	153	1	568	-	-	2	-	-	-
548000 - Computer Equipment	364	62	19	1,400	-	5,593	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	1,270	655	1,236	3,188	-	9,385	-	-	-
552000 - Building Acquisition/Improvmnt	58	84	-	-	-	1	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
553000 - Improvements - Not Buildings	2	-	-	-	**-**	-	-	-	**-**
554100 - Initial and Addl Equipment	7	118	151	-	**-**	-	-	-	**-**
554110 - Vehicles	-	-	27	-	**-**	-	-	-	**-**
555010 - Computers	9	-	-	-	**-**	3	-	-	**-**
555090 - Misc Other Technology	4	-	11	-	**-**	-	-	-	**-**
556410 - Buses/Capital Bus Improvements	200	-	688	-	**-**	777	-	-	**-**
Subtotal - 500 - CAPITAL OUTLAY	280	202	878	-	**-**	781	-	-	**-**
563500 - Administrative Write-Off	-	-	2	-	**-**	-	-	-	**-**
564000 - Dues and Fees	60	59	6	172	**-**	402	-	-	**-**
569000 - Grant Indirect Charges	132	132	118	247	**-**	287	-	-	**-**
Subtotal - Other Objects	193	192	126	419	**-**	689	-	-	**-**
376520 - Budgeted Ending Fund Balance	15,710	17,927	16,183	-	**-**	-	-	-	**-**
Subtotal - 376520 - Budgeted Ending Fund Balance	15,710	17,927	16,183	-	**-**	-	-	-	**-**
Total Requirements by Object	26,210	27,118	26,968	16,086	**37.28**	28,297	-	-	**37.47**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

DEBT SERVICE FUNDS SUMMARY (300)

Fund 300 - Debt Service Fund Resources Summary

Growth in fund 300 resources is related to growth in assessed value of properties within the District's service boundaries, and increased internal service charges to fund payment of pension debt. Resources are expected to grow $6.2 million from 2025-26 to 2026-27, to meet the increased need in Pension and General Obligation (GO) bond debt service. When GO bonds are sold, repayment is structured with the intent of keeping property taxes consistent until maturity. Ideally, millage rates do not grow, but revenues grow with assessed value increases.

Fund 300 - Debt Service Fund Requirements Summary

This fund accounts for the District's payment of principal and interest on long term obligations, including GO bonds from 2012, 2017, 2020, and 2025 authorizations, Limited Tax Pension Obligations and Full Faith and Credit Obligations (FFCO). When GO bonds are sold, repayment is structured with the intent of keeping property tax rates consistent until maturity. Requirements are expected to increase by $6.2 million from 2025-26 to 2026-27, due to increases in Pension and GO bond debt service. Additional tax revenues will be used to pay the principal and interest on the 2012, 2017 and 2020 bond authorizations. The total outstanding debt as of June 30, 2026 is projected to be $2.1 billion.

A major portion of the District's debt service relates to GO bonds approved in the November 2012, the May 2017, November 2020, and May 2025 elections. Overall, Portland voters have overwhelmingly supported GO bonds for capital improvement totaling approximately $4.3 billion to upgrade PPS schools. To continue work on school modernizations and other capital projects, the District issued $660 million in debt in February 2026.

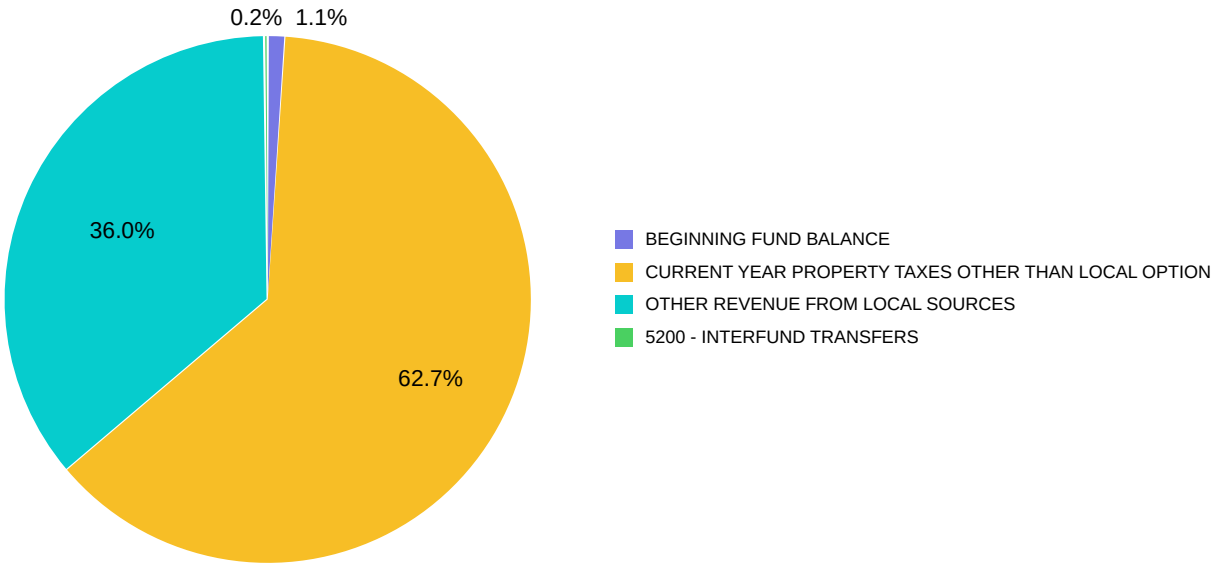
The second largest portion of the District's debt is related to pension obligation bonds. Through these bond strategic investments, the District has been able to contain its PERS costs. This translates to more General Fund resources remaining available for investment in programs aligned to District goals.

In 2026-27, the District will have debt service payments on bonds issued to address PERS Unfunded Actuarial Liability (UAL). The PERS Unfunded Actuarial Liability (UAL) requires a fringe rate of 18.79% applied to PERS eligible payroll, up from 17.39% in 2025-26.

Summary of Resources by Major Object 300 - Debt Service Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
BEGINNING FUND BALANCE	13,705	18,303	14,716	3,242	3,000	-	-
CURRENT YEAR PROPERTY TAXES OTHER THAN LOCAL OPTION	144,141	156,472	157,302	171,552	174,945	-	-
OTHER REVENUE FROM LOCAL SOURCES	85,955	90,190	93,417	97,277	100,313	-	-
4000 - REVENUE FROM FEDERAL SOURCES	7	-	-	-	-	-	-
5200 - INTERFUND TRANSFERS	1,235	619	619	619	618	-	-
Total Resources	**245,042**	**265,585**	**266,053**	**272,690**	**278,876**	**-**	**-**

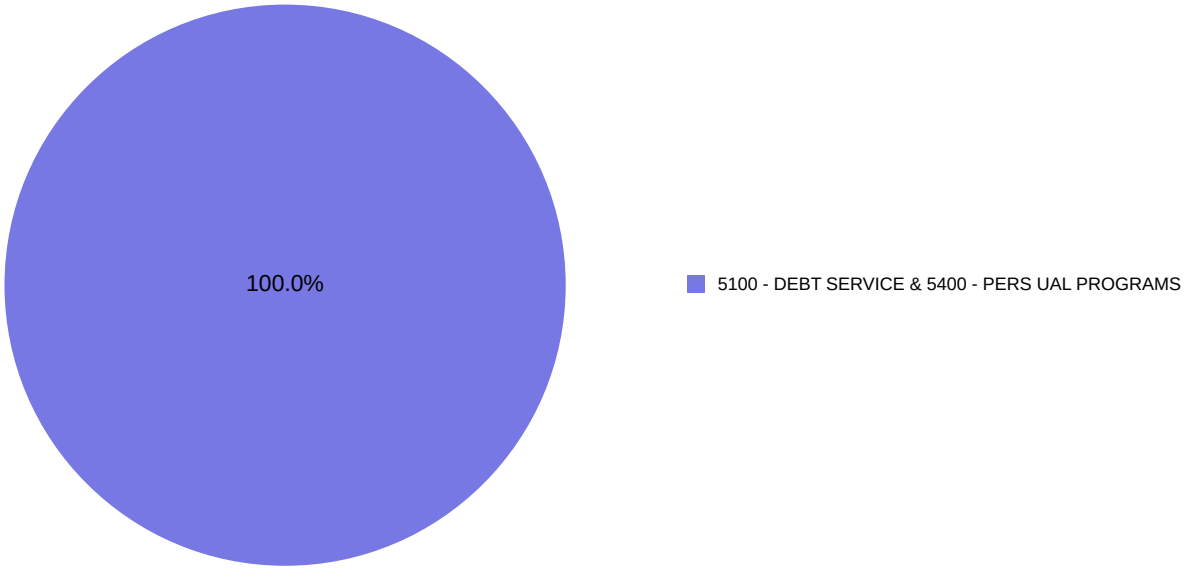
Percent of Resources by Major Object 300 - Debt Service Funds



Summary of Requirements by Major Function 300 - Debt Service Funds (in thousands)

Major Function	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
5100 - DEBT SERVICE & 5400 - PERS UAL PROGRAMS	226,739	250,869	259,099	272,690	-	278,876	-	-	-
7000 - UNAPPROPRIATED FUND BALANCE	18,303	14,716	6,954	-	-	-	-	-	-
Total Requirements	**245,042**	**265,585**	**266,053**	**272,690**	**-**	**278,876**	**-**	**-**	**-**

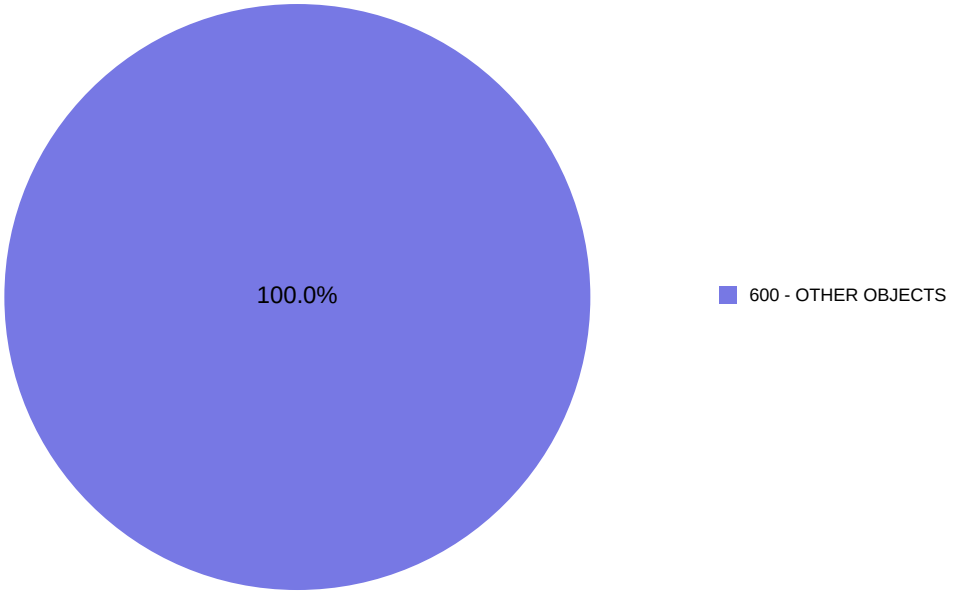
Percent of Requirements by Major Function 300 - Debt Service Funds



Summary of Requirements by Major Object 300 - Debt Service Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
600 - OTHER OBJECTS	226,739	250,869	259,099	272,690	-	278,876	-	-	-
376520 - Budgeted Ending Fund Balance	18,303	14,716	6,954	-	-	-	-	-	-
Total Requirements	**245,042**	**265,585**	**266,053**	**272,690**	**-**	**278,876**	**-**	**-**	**-**

Percent of Requirements by Major Object 300 - Debt Service Funds



DEBT SERVICE OVERVIEW

Pension Bonds

In October 2002 Portland Public Schools participated as one of forty-one Oregon school districts and education service districts in issuing limited tax pension bonds. The proceeds were used to finance a portion of the estimated unfunded actuarial liability of each participating school district with the Oregon Public Employees Retirement System ("PERS"). The Oregon School Boards Association ("OSBA") sponsored this pooled limited tax pension bond program. The OSBA does not have a financial obligation in connection with the bonds issued under the program. Except for the payment of its pension bond payments and additional charges when due, each participating school district has no obligation or liability to any other participating school district's pension bonds or liabilities to PERS. In April 2003, OSBA sponsored another pooled limited tax pension bond program with thirty school districts and education service districts. Payments of yearly principal and interest are recorded as financial statement expenditures in instruction and in support services.

On October 31, 2002, the District issued $210.1 million Limited Tax Pension Bonds, Series 2002 (Federally Taxable), of which $53.5 million are Series 2002A (deferred interest bonds) and $156.6 million are Series 2002B (current interest bonds). The Series 2002A Bonds were paid off June 30, 2020. The 2002B Bonds are payable annually through June 2028. During 2012, $14.2 million of Series 2002 Pension Bonds were refinanced. The Series 2012 Refunding was paid off June 30, 2021.

On April 30, 2003, the District issued $281.2 million Limited Tax Pension Bonds, Series 2003 (Federally Taxable), of which $124.8 million are Series 2003A (deferred interest bonds) and $156.4 million are Series 2003B (current interest bonds). The Series 2003 Limited Tax Pension Bonds are payable annually through June 2028.

On July 15, 2021 the District issued $399.4 million Full Faith and Credit Pension Bonds, Series 2021 (Federally Taxable). The Series 2021 Full Faith and Credit Bonds are payable annually through June 2040.

The District anticipates the total costs of financing the District's UAL with Limited Tax and Full Faith and Credit Pension Bonds will result in a significant savings to the District when compared to paying for such costs as additional contribution rates to PERS.

General Obligation Bonds

As part of a $482.0 million capital bond measure passed by District voters in 2012, the District issued the following General Obligation debt to finance school renovation and replacement:

On May 1, 2013, the District issued $68.6 million in General Obligation Bonds, Series 2013B. The bonds mature on June 15, 2033 with principal payments due annually on June 15. On December 30, 2020 $50.4 million of Series 2013B General Obligation Bonds were refinanced through an advance refunding.

On April 30, 2015, the District issued $244.7 million in General Obligation Bonds, Series 2015B. The bonds mature on June 15, 2033 with principal payments due annually on June 15.

On August 10, 2017, the District issued $62.2 million in General Obligation Bonds, Series 2017B. The bonds mature on June 15, 2030, with principal payments due annually on June 15.

As part of a $790.0 million capital bond measure passed by District voters in 2017, the District has issued the following General Obligation debt to finance school renovation and replacement:

On August 10, 2017, the District issued $179.7 million in General Obligation Bonds, Series 2017B. The bonds mature on June 15, 2044 with principal payments due annually on June 15.

On April 14, 2020, the District issued $441.3 million in General Obligation Bonds, Series 2020. The bonds mature on June 15, 2037, with principal payments due annually on June 15.

On December 30, 2020, the District issued $54.0 million in General Obligation Advance Refunding Bonds, Series 2020C. The bond proceeds were used to redeem Series 2013B bonds. The bonds mature on June 15, 2033, with principal payments due annually on June 15. The Series 2020C Bonds maturing on or after June 15, 2031 are subject to optional early redemption. The total amount of interest savings (economic gain) as a result of the refinancing is $6.2 million. The present value of future cash savings as a result of the refinancing is $5.5 million.

As part of a $1.2 billion capital bond measure passed by District voters in November 2020, the District issued the following General Obligation debt to finance capital projects, including school renovation and replacement:

On December 30, 2020, the District issued $365.5 million in General Obligation Bonds, Series 2020B. The bonds mature on June 15, 2046, with principal payments due annually on June 15.

On April 27, 2023, the District issued $420.0 million in General Obligation Bonds, Series 2023. The bonds mature on June 15, 2049, with principal payments due annually on June 15.

On May 21, 2025, the District sold $79.5 million in bonds to raise capital to continue work under the 2020 Ballot Title Authorization.

On February 24, 2026, the District sold an additional $90.0 million in bonds under the 2020 authorization.

As part of a $1.83 billion capital bond measure passed by District voters in May 2025, the District issued the following General Obligation debt to finance capital projects, including school renovation and replacement:

On February 24, 2026, $570.0 million was issued under the 2025 renewal authorization approval by voters to continue modernization and construction of facilities.

Article XI-K of the Oregon Constitution allows the state to guarantee the general obligation bonded indebtedness of school districts. For the Series 2013B, 2015B, 2017B, 2020, 2020B, and 2020C General Obligation Bonds mentioned immediately above, the District participated in the Oregon School Bond Guaranty program (ORS 328.321 to 328.356), whereby the State of Oregon (State) guarantees all principal and interest payments until maturity will be made to bondholders when due. Should the District fail to make a payment of debt service on these bonds when due, the State will make the payment on behalf of the District, and then will seek recovery from the District. The State may recover funds by means of intercepting any source of operating monies normally remitted from the State to the District. Since the inception of the bonds, the District has not used the guarantee.

Other Debt

On November 9, 2016, the District issued $5.0 million in Full Faith and Credit Obligations, Series 2016. The obligations mature on December 1, 2031. The obligations carry a prepayment option such that any or all outstanding maturities may be redeemed on or after December 1, 2018.

On August 4, 2016 the District issued $4.0 million in Qualified Zone Academy (QZAB) Bonds, Series 2016. The District pays no interest over the 20 year term of the bonds. The bonds carry a 4.39 percent interest rate for structuring purposes, but the purchaser of the bonds receives a Federal tax credit in lieu of interest earnings. The bonds mature on August 4, 2036.

Legal Debt Limit

ORS 328.245 establishes a parameter of bonded indebtedness for school districts. Aggregates are governed by real market values within the District based on the following:

For each grade from kindergarten to eighth for which the District operates schools, fifty-five one-hundredths of one percent (.0055) of the real market valueFor each grade from ninth to twelfth for which the District operates schools, seventy-five one-hundredths of one percent (.0075) of the real market value

Ten years of Legal Debt Margin information from the District's 2024-25 Annual Comprehensive Financial Report is included on the following page.

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Legal Debt Margin Information
Last Ten Fiscal Years
(dollars in thousands)

Legal Debt Margin Calculation for Fiscal Year 2025

Real Market Value	$ 151,420,136
Debt Limit (7.95% of Real Market Value) [1]	$ 12,037,901
Amount of Debt Applicable to Debt Limit:	
General Obligation Bonded Debt	1,304,876
Less: Amount Available in Debt Service Funds	(5,930)
Amount of Debt Applicable to Debt Limit	1,298,946
Legal Debt Margin	$ 10,738,955

	Debt Limit	Total net debt applicable to limit	Legal debt margin	Total net debt applicable to the limit as a percentage of debt limit
2025	$ 12,037,901	$ 1,298,946	$ 10,738,955	10.79%
2024	12,455,098	1,346,486	11,108,612	10.81
2023	12,487,714	1,464,030	11,023,684	11.72
2022	11,707,470	1,117,665	10,589,805	9.55
2021	11,149,825	1,220,405	9,929,420	10.95
2020	10,698,745	924,888	9,773,857	8.64
2019	10,472,898	526,062	9,946,836	5.02
2018	9,670,978	633,588	9,037,390	6.55
2017	8,501,342	309,076	8,192,266	3.64
2016	7,228,979	346,748	6,882,231	4.80

Allowable Percentage of Real Market Value:	
[A] Kindergarten through eighth grade, 9 x .0055	4.95%
[B] Ninth through twelfth, 4 x .0075	3.00%
Allowable Percentage	7.95% [1]

Notes

[1] ORS 328.245 establishes a parameter of bonded indebtedness for school districts. Aggregates are governed by real market values within the District based on the following:

[A] For each grade from kindergarten to eighth for which the District operates schools, fifty-five one-hundredths of one percent (.0055) of the real market value.

[B] For each grade from ninth to twelfth for which the District operates schools, seventy-five one-hundredths of one percent (.0075) of the real market value.

Sources

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year

Portland Public Schools 2024-25 Annual Comprehensive Financial Report

PERS UAL DEBT SERVICE FUND (308)

The fund was established to improve the transparency of debt service related to the Public Employees Retirement System (PERS) unfunded actuarial liability (UAL) debt. The District, in cooperation with a number of districts across the state and in cooperation with the Oregon School Boards Association, issued two series of limited tax Pension Obligation Bonds (POB). These were series 2002 and series 2003.

On July 15, 2021, the District issued a series of Federally Taxable Full Faith and Credit Bonds to finance all or a portion of the District's share of the estimated PERS UAL.

Resources include revenues generated from payroll charges dedicated solely to payment of PERS UAL debt service, and interest earnings on funds collected monthly and held in trust in bank accounts reserved for debt service payments.

Fund 308 was established as part of the Adopted Budget process in accordance with Board Resolution No. 4473 on June 27, 2011. The fund was effective as of July 1, 2011.

Fund 308 - PERS UAL Debt Service Fund Detail

Resources by Object - 308 - PERS UAL Debt Service (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
377000 - Fund Balance-Unres/Undes	1,925	2,787	2,225	-	-	-	-
Subtotal - Beginning Fund Balance	1,925	2,787	2,225	-	-	-	-
415100 - Interest on Investments	1,488	2,413	2,105	1,883	1,996	-	-
419700 - Services Provided Other Funds	79,818	81,705	84,639	91,336	94,862	-	-
Subtotal - Other Revenue from Local Sources	81,307	84,118	86,745	93,220	96,858	-	-
Total Resources by Object	83,232	86,905	88,970	93,220	96,858	-	-

Requirements by Function - 308 - PERS UAL Debt Service (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
5100 - DEBT SERVICE	80,445	84,680	87,945	93,220	-	96,858	-	-	-
Subtotal - 5100 - DEBT SERVICE & 5400 - PERS UAL PROGRAMS	80,445	84,680	87,945	93,220	-	96,858	-	-	-
71100 - Ending Fund Balance	2,787	2,225	1,024	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	2,787	2,225	1,024	-	-	-	-	-	-
Total Requirements by Function	83,232	86,905	88,970	93,220	-	96,858	-	-	-

Requirements by Object - 308 - PERS UAL Debt Service (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
561000 - Redemption of Principal	38,296	62,240	68,320	76,773	-	83,990	-	-	-
562100 - Interest (Except Bus/Garage)	42,148	22,440	19,625	16,447	-	12,868	-	-	-
Subtotal - Other Objects	80,445	84,680	87,945	93,220	-	96,858	-	-	-
376520 - Budgeted Ending Fund Balance	2,787	2,225	1,024	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	2,787	2,225	1,024	-	-	-	-	-	-
Total Requirements by Object	83,232	86,905	88,970	93,220	-	96,858	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

FULL FAITH AND CREDIT DEBT SERVICE FUND (320)

This fund is used to manage the repayment of principal and interest for debt incurred using funds borrowed under the full faith and credit facility of the District. The fund captures the principal and interest for multiple borrowings, each of which fund a specific venture or capital expenditure.

The fund included the payment of debt for the Recovery Zone Bond-Energy and Water Conservation Program. The interest payments were federally subsidized by this bond program. The balance of the interest payments and the principal were funded through transfers from the General Fund. This debt was paid off in 2022-23.

On July 25, 2016 by way of Board Resolution No. 5314, the Board authorized entering into a purchase agreement sale of the Board's Qualified Zone Academy Bonds (QZAB) for $4.0 million. This fund also accounts for the principal and interest payments resulting from the issuance of QZAB bonds.

On September 6, 2016 by way of Board Resolution No. 5330, the Board voted to authorize the issuance of a principal amount of revenue bonds sufficient to provide net proceeds of up to $5 million for immediate environmental health and safety issues and assessments. The District is utilizing these funds for projects that remediate health and safety concerns, including repairs to the water system, lead paint encapsulation and abatement, and environmental health and safety assessment and other health and safety related projects.

Fund 320 - Full Faith and Credit Debt Service Fund Detail

Resources by Object - 320 - Full Faith & Credit Debt Service (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
449100 - Federal Subsidy	7	-	-	-	-	-	-
Subtotal - 4000 - REVENUE FROM FEDERAL SOURCES	7	-	-	-	-	-	-
452100 - Interfund Transfers	1,235	619	619	619	618	-	-
Subtotal - 5200 - INTERFUND TRANSFERS	1,235	619	619	619	618	-	-
Total Resources by Object	1,241	619	619	619	618	-	-

Requirements by Function - 320 - Full Faith & Credit Debt Service (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
5100 - DEBT SERVICE	1,241	619	619	619	-	618	-	-	-
Subtotal - 5100 - DEBT SERVICE & 5400 - PERS UAL PROGRAMS	1,241	619	619	619	-	618	-	-	-
Total Requirements by Function	1,241	619	619	619	-	618	-	-	-

Requirements by Object - 320 - Full Faith & Credit Debt Service (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
561000 - Redemption of Principal	1,123	525	535	545	-	555	-	-	-
562100 - Interest (Except Bus/Garage)	119	94	84	74	-	63	-	-	-
Subtotal - Other Objects	1,241	619	619	619	-	618	-	-	-
Total Requirements by Object	1,241	619	619	619	-	618	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

GO BONDS DEBT SERVICE FUND (350)

This fund is used to manage the repayment of principal and interest for debt incurred using funds borrowed through the issuance of General Obligation bonds. The fund captures the principal and interest for multiple borrowings, each of which funds a specific capital expenditure.

Activity in this fund includes the issuance of General Obligation bonds in 2013, 2015 and 2017, issued under the $482.0 million bond authorized by voters in November 2012.

In addition, this fund includes the issuance of General Obligation bonds in 2017 and 2020, issued under the $790.0 million bond authorized by voters in May 2017.

This fund also includes the issuance of General Obligation bonds in 2020, 2023, 2025, and 2026 issued under the $1.20 billion bond authorized by voters in November 2020.

Most recently, the District issued $570.0 million in General Obligation bonds under the $1.83 billion bond authorized by voters in May 2025.

The creation of this fund was authorized in accordance with Board Resolution No. 4416 on February 28, 2011.

Fund 350 - GO Bonds Debt Service Fund Detail

Resources by Object - 350 - GO Bonds Debt Service Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	3,242	3,000	-	-
377000 - Fund Balance-Unres/Undes	11,780	15,516	12,491	-	-	-	-
Subtotal - Beginning Fund Balance	11,780	15,516	12,491	3,242	3,000	-	-
411111 - Current-Multnomah Co	143,134	155,389	156,209	170,284	173,661	-	-
411112 - Current-Clackamas Co	107	117	120	138	139	-	-
411113 - Current-Washington Co	899	966	973	1,130	1,145	-	-
Subtotal - Current Year Property Taxes other than Local Option	144,141	156,472	157,302	171,552	174,945	-	-
411521 - PY GO Bond - Multnomah County	1,385	1,557	2,815	2,094	1,694	-	-
411522 - PY GO Bond - Clackamas County	2	1	1	1	1	-	-
411523 - PY GO Bond - Washington County	7	7	6	10	10	-	-
411901 - Pen/Int-Multnomah Co	237	451	368	49	50	-	-
411902 - Pen/Int-Clackamas Co	-	-	-	-	-	-	-
411903 - Pen/Int-Washington Co	1	2	2	1	-	-	-
415100 - Interest on Investments	3,015	4,055	3,479	1,901	1,700	-	-
Subtotal - Other Revenue from Local Sources	4,648	6,072	6,672	4,057	3,455	-	-
Total Resources by Object	160,569	178,061	176,465	178,851	181,400	-	-

Requirements by Function - 350 - GO Bonds Debt Service Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
5100 - DEBT SERVICE	145,053	165,570	170,535	178,851	-	181,400	-	-	-
Subtotal - 5100 - DEBT SERVICE & 5400 - PERS UAL PROGRAMS	145,053	165,570	170,535	178,851	-	181,400	-	-	-
71100 - Ending Fund Balance	15,516	12,491	5,930	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	15,516	12,491	5,930	-	-	-	-	-	-
Total Requirements by Function	160,569	178,061	176,465	178,851	-	181,400	-	-	-

Requirements by Object - 350 - GO Bonds Debt Service Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
561000 - Redemption of Principal	107,970	111,250	124,315	134,820	-	101,400	-	-	-
562100 - Interest (Except Bus/Garage)	37,083	54,320	46,220	44,031	-	80,000	-	-	-
Subtotal - Other Objects	145,053	165,570	170,535	178,851	-	181,400	-	-	-
376520 - Budgeted Ending Fund Balance	15,516	12,491	5,930	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	15,516	12,491	5,930	-	-	-	-	-	-
Total Requirements by Object	160,569	178,061	176,465	178,851	-	181,400	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

CAPITAL PROJECTS FUNDS SUMMARY (400)

Fund 400 - Capital Projects Fund Resources Summary

Fund 400 budgeted resources will be $738.7 million more than 2025-26, an increase of 114.8%, due to the debt issuance in February of 2026.

With the limited annual resources and aging buildings and systems, there has been a focus to bring in additional funds in support of establishing equitable student outcomes, stability and improved student experiences.

Voters passed capital improvement bonds in 2012, 2017, 2020 and 2025, totaling nearly $4.3 billion to upgrade PPS Schools. Learn more: bond.pps.net.

Efforts have secured funding through additional sources, such as Recovery Zone Bonds (RZB), Qualified Zone Academy Bonds (QZAB), Seismic Rehab Grant Program (SRGP), loans, and Oregon School Capital Improvement Matching Program (OSCIM).

Fund 400 - Capital Projects Fund Requirements Summary

The District is advancing various capital improvement initiatives. Learn more: pps.net/rise.

Portland Public Schools' aging infrastructure necessitates significant upgrades for modern learning environments and safety. The District's extensive capital needs surpass available resources, driving the pursuit of innovative solutions.

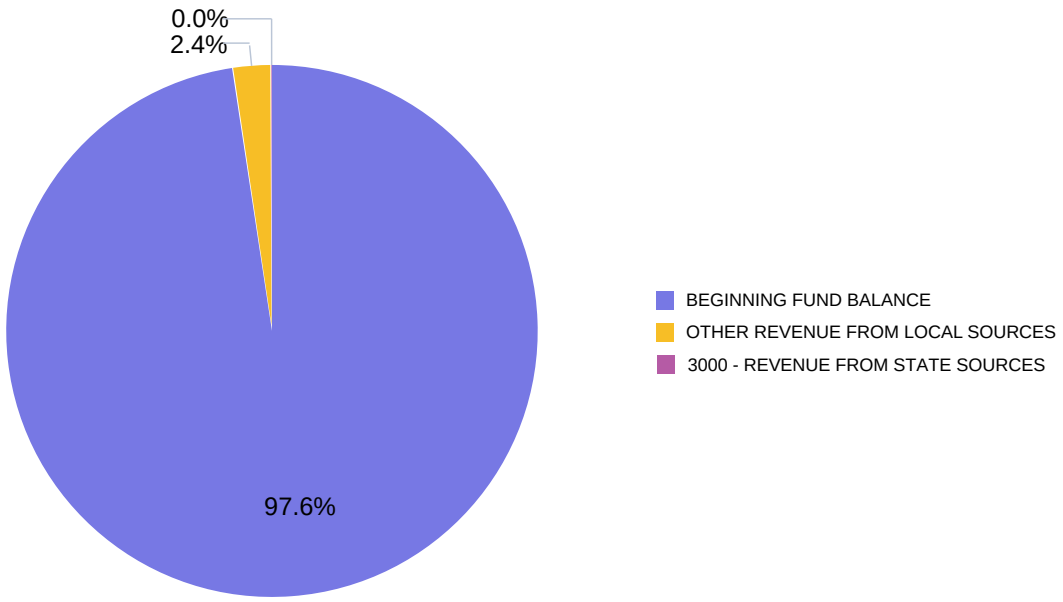
The District was tasked with the relocation of Harriet Tubman Middle School; this effort was in response to the Oregon Department of Transportation's decision to expand Interstate 5. The District received a state grant for this initiative. However, the project is now paused due to Oregon Department of Transportation's funding-related project delays. Resources for this fund are included in Fund 437.

The Facilities Capital Fund (438) is used to manage grant/project funding for capital projects.

Summary of Resources by Major Object 400 - Capital Projects Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
BEGINNING FUND BALANCE	521,839	730,551	474,635	514,705	1,349,310	-	-
OTHER REVENUE FROM LOCAL SOURCES	21,112	40,936	29,865	11,477	32,690	-	-
2000 - REVENUE - INTERMEDIATE SOURCES	237	-	1	-	-	-	-
3000 - REVENUE FROM STATE SOURCES	2,110	2,903	1,163	2,000	508	-	-
4000 - REVENUE FROM FEDERAL SOURCES	9,304	-	-	-	-	-	-
5200 - INTERFUND TRANSFERS	610	810	-	1,000	-	-	-
ALL OTHER BUDGET RESOURCES	464,832	10,300	98,214	114,591	-	-	-
Total Resources	**1,020,043**	**785,500**	**603,877**	**643,773**	**1,382,508**	**-**	**-**

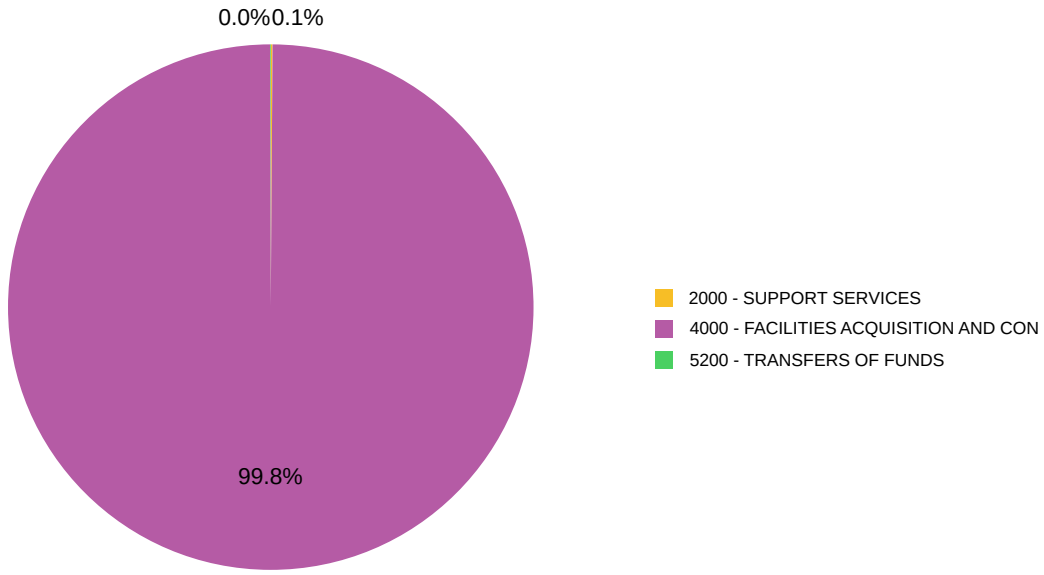
Percent of Resources by Major Object 400 - Capital Projects Funds



Summary of Requirements by Major Function 400 - Capital Projects Funds (in thousands)

Major Function	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
2000 - SUPPORT SERVICES	3,321	1,232	1,708	1,995	**2.80**	1,501	-	-	**-**
3000 - ENTERPRISE AND COMMUNITY SVCS	-	-	-	1,301	**-**	-	-	-	**-**
4000 - FACILITIES ACQUISITION AND CON	285,554	309,014	167,498	639,859	**46.25**	1,380,388	-	-	**29.00**
5200 - TRANSFERS OF FUNDS	618	619	619	619	**-**	618	-	-	**-**
7000 - UNAPPROPRIATED FUND BALANCE	730,551	474,635	434,052	-	**-**	-	-	-	**-**
Total Requirements	**1,020,043**	**785,500**	**603,877**	**643,773**	**49.05**	**1,382,508**	**-**	**-**	**29.00**

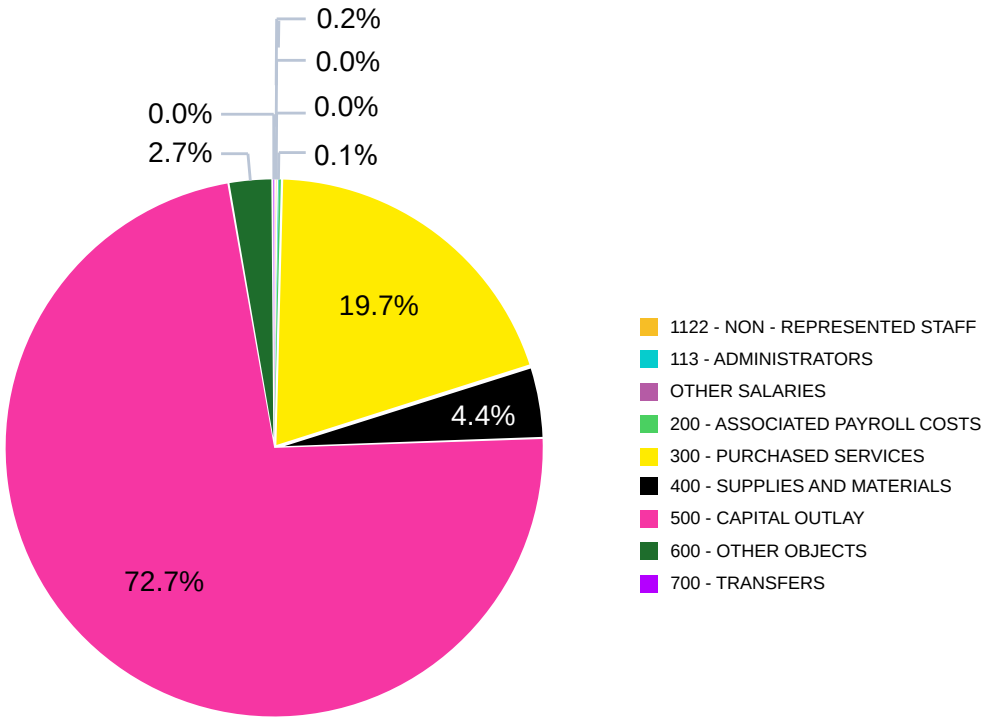
Percent of Requirements by Major Function 400 - Capital Projects Funds



Summary of Requirements by Major Object 400 - Capital Projects Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
1121 - CLASSIFIED - REPRESENTED	180	159	130	213	**3.00**	-	-	-	-
1122 - NON - REPRESENTED STAFF	4,391	4,822	4,968	5,543	**45.05**	3,226	-	-	**26.00**
113 - ADMINISTRATORS	-	56	73	152	**1.00**	525	-	-	**3.00**
OTHER SALARIES	97	391	259	-	-	31	-	-	-
200 - ASSOCIATED PAYROLL COSTS	1,830	2,043	2,039	2,868	-	1,891	-	-	-
300 - PURCHASED SERVICES	31,439	37,535	38,309	120,707	-	272,150	-	-	-
400 - SUPPLIES AND MATERIALS	31,469	14,706	9,903	19,401	-	60,468	-	-	-
500 - CAPITAL OUTLAY	211,119	246,558	104,877	488,577	-	1,005,656	-	-	-
600 - OTHER OBJECTS	8,351	3,976	8,647	5,694	-	37,943	-	-	-
700 - TRANSFERS	618	619	619	619	-	618	-	-	-
376520 - Budgeted Ending Fund Balance	730,551	474,635	434,052	-	-	-	-	-	-
Total Requirements	**1,020,043**	**785,500**	**603,877**	**643,773**	**49.05**	**1,382,508**	**-**	**-**	**29.00**

Percent of Requirements by Major Object 400 - Capital Projects Funds



CONSTRUCTION EXCISE FUND (404)

This Capital Projects Fund accounts for the resources and requirements for school facility projects funded through the Construction Excise Tax as allowed under Senate Bill 1036.

The Construction Excise Tax was approved by the Board of Directors per Resolution No. 3833 on January 14, 2008. The tax is imposed on improvements to real property within the District's boundaries that result in new construction or additional square footage in an existing structure, with exemptions outlined in SB 1036. The use of funds is limited to capital improvements to school facilities.

The tax is collected on behalf of the District by the responsible local government jurisdiction issuing building permits.

Fund 404 - Construction Excise Fund Detail

Resources by Object - 404 - Construction Excise Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
377000 - Fund Balance-Unres/Undes	12,830	1,912	24	-	-	-	-
Subtotal - Beginning Fund Balance	12,830	1,912	24	-	-	-	-
411301 - Construct Excise Tax - Cty Ptd	4,187	1,776	1,686	1,500	1,500	-	-
411303 - Construct Excise Tax - Wash Ct	3	10	42	-	-	-	-
415100 - Interest on Investments	16	-	-	-	-	-	-
419910 - Miscellaneous	261	-	-	-	-	-	-
Subtotal - Other Revenue from Local Sources	4,467	1,786	1,728	1,500	1,500	-	-
Total Resources by Object	17,297	3,698	1,752	1,500	1,500	-	-

Requirements by Function - 404 - Construction Excise Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
4110 - Service Area Direction	-	-	-	-	**-**	218	-	-	**1.00**
4150 - Bldg Acquis/Constr/Improv Svcs	14,767	3,055	1,121	881	**2.50**	664	-	-	**-**
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	14,767	3,055	1,121	881	**2.50**	882	-	-	**1.00**
52100 - Fund Transfers	618	619	619	619	**-**	618	-	-	**-**
Subtotal - 5200 - TRANSFERS OF FUNDS	618	619	619	619	**-**	618	-	-	-
71100 - Ending Fund Balance	1,912	24	12	-	**-**	-	-	-	**-**
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	1,912	24	12	-	**-**	-	-	-	**-**
Total Requirements by Function	17,297	3,698	1,752	1,500	**2.50**	1,500	-	-	**1.00**

Requirements by Object - 404 - Construction Excise Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
511220 - Non-Represented Staff	440	377	259	357	**2.50**	147	-	-	**1.00**
513510 - Group Hlth Opt Out Lic	5	5	1	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	445	382	260	357	**2.50**	147	-	-	**1.00**
521000 - PERS	-	-	-	15	**-**	6	-	-	**-**
521310 - PERS UAL	69	62	38	62	**-**	28	-	-	**-**
522000 - Social Security - FICA	35	30	20	27	**-**	11	-	-	**-**
523100 - Workers' Compensation	3	2	-	2	**-**	1	-	-	**-**
523200 - Unemployment Compensation	-	3	-	-	**-**	1	-	-	**-**
523300 - PFMLA	-	1	1	2	**-**	1	-	-	**-**
524100 - Group Health Insurance	48	33	24	53	**-**	22	-	-	**-**
524200 - Other Employer Paid Benefits	2	2	1	1	**-**	-	-	-	**-**
524300 - Retiree Health Insurance	2	2	1	2	**-**	1	-	-	**-**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
524530 - Early Retirement Benefits	1	1	-	1	**-**	-	-	-	**-**
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	160	136	86	164	**-**	71	-	-	**-**
532200 - Repairs and Maintenance Svcs	638	732	261	-	**-**	-	-	-	**-**
532400 - Rentals	29	29	32	-	**-**	-	-	-	**-**
532500 - Electricity	-	16	-	-	**-**	-	-	-	**-**
532900 - Other Property Services	49	201	87	-	**-**	-	-	-	**-**
538300 - Architect and Engineering Svcs	126	153	20	-	**-**	-	-	-	**-**
538940 - Professional Moving Services	4	1	-	-	**-**	-	-	-	**-**
538990 - Non-Instr Pers/Professional Sv	65	100	49	-	**-**	-	-	-	**-**
Subtotal - 300 - PURCHASED SERVICES	911	1,232	449	-	**-**	-	-	-	**-**
546000 - Non-Consumable Supplies	41	1	-	-	**-**	-	-	-	**-**
Subtotal - 400 - SUPPLIES AND MATERIALS	42	1	-	-	**-**	-	-	-	**-**
552000 - Building Acquisition/Improvmnt	12,762	1,053	281	361	**-**	664	-	-	**-**
553000 - Improvements - Not Buildings	202	155	40	-	**-**	:	-	-	**-**
554100 - Initial and Addl Equipment	231	84	-	-	**-**	-	-	-	**-**
Subtotal - 500 - CAPITAL OUTLAY	13,195	1,291	321	361	**-**	664	-	-	**-**
564000 - Dues and Fees	9	4	3	-	**-**	-	-	-	**-**
567100 - Permits	6	9	3	-	**-**	-	-	-	**-**
Subtotal - Other Objects	15	12	6	-	**-**	-	-	-	**-**
571000 - Transfers to Other Funds	618	619	619	619	**-**	618	-	-	**-**
Subtotal - 700 - TRANSFERS	618	619	619	619	**-**	618	-	-	**-**
376520 - Budgeted Ending Fund Balance	1,912	24	12	-	**-**	-	-	-	**-**
Subtotal - 376520 - Budgeted Ending Fund Balance	1,912	24	12	-	**-**	-	-	-	**-**
Total Requirements by Object	17,297	3,698	1,752	1,500	**2.50**	1,500	-	-	**1.00**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

FULL FAITH AND CREDIT FUND (420)

This fund is used to manage capital expenditures for specifically authorized projects, including those projects funded through proceeds from the Recovery Zone Bond- Energy and Water Conservation Program and other loan proceeds.

This creation of the fund was authorized by the Board of Education per Board Resolution No. 4416 on February 28, 2011.

Fund 420 - Full Faith and Credit Fund Detail

Resources by Object - 420 - FULL FAITH & CREDIT FUNDS (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
377000 - Fund Balance-Unres/Undes	235	98	-	-	-	-	-
Subtotal - Beginning Fund Balance	235	98	-	-	-	-	-
Total Resources by Object	235	98	-	-	-	-	-

Requirements by Function - 420 - FULL FAITH & CREDIT FUNDS (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
2540 - OPER/MAINTENANCE OF PLANT SVCS	21	8	-	-	-	-	-	-	-
Subtotal - 2000 - SUPPORT SERVICES	21	8	-	-	-	-	-	-	-
4150 - Bldg Acquis/Constr/Improv Svcs	117	90	-	-	-	-	-	-	-
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	117	90	-	-	-	-	-	-	-
71100 - Ending Fund Balance	98	-	-	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	98	-	-	-	-	-	-	-	-
Total Requirements by Function	235	98	-	-	-	-	-	-	-

Requirements by Object - 420 - FULL FAITH & CREDIT FUNDS (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
532200 - Repairs and Maintenance Svcs	51	26	-	-	-	-	-	-	-
538300 - Architect and Engineering Svcs	4	-	-	-	-	-	-	-	-
Subtotal - 300 - PURCHASED SERVICES	55	26	-	-	-	-	-	-	-
552000 - Building Acquisition/Improvmnt	65	-	-	-	-	-	-	-	-
553000 - Improvements - Not Buildings	18	71	-	-	-	-	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	83	71	-	-	-	-	-	-	-
376520 - Budgeted Ending Fund Balance	98	-	-	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	98	-	-	-	-	-	-	-	-
Total Requirements by Object	235	98	-	-	-	-	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

ENERGY EFFICIENT SCHOOLS FUND (435)

The Energy Efficient Schools Fund is used to manage capital expenditures for specifically designated capital projects, including those projects funded, in part, through proceeds authorized by State Bill 1149.

This fund was formally created as part of the District's 2012-13 budget process.

Fund 435 - Energy Efficient Schools Fund Detail

Resources by Object - 435 - Energy Efficient Schools Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	5,000	5,740	-	-
377000 - Fund Balance-Unres/Undes	3,082	3,318	4,592	-	-	-	-
Subtotal - Beginning Fund Balance	3,082	3,318	4,592	5,000	5,740	-	-
419910 - Miscellaneous	-	730	660	350	350	-	-
419948 - Utility Refund - PGE	883	975	1,097	1,000	1,000	-	-
419949 - Utility Refund - Pacific Power	322	389	401	400	400	-	-
Subtotal - Other Revenue from Local Sources	1,205	2,094	2,158	1,750	1,750	-	-
422000 - Restricted Revenue	237	-	-	-	-	-	-
Subtotal - 2000 - REVENUE - INTERMEDIATE SOURCES	237	-	-	-	-	-	-
Total Resources by Object	4,525	5,412	6,750	6,750	7,490	-	-

Requirements by Function - 435 - Energy Efficient Schools Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
4150 - Bldg Acquis/Constr/Improv Svcs	1,207	820	1,888	6,750	-	7,490	-	-	-
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	1,207	820	1,888	6,750	-	7,490	-	-	-
71100 - Ending Fund Balance	3,318	4,592	4,863	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	3,318	4,592	4,863	-	-	-	-	-	-
Total Requirements by Function	4,525	5,412	6,750	6,750	-	7,490	-	-	-

Requirements by Object - 435 - Energy Efficient Schools Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
552000 - Building Acquisition/Improvmnt	1,207	820	1,888	6,750	-	7,490	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	1,207	820	1,888	6,750	-	7,490	-	-	-
376520 - Budgeted Ending Fund Balance	3,318	4,592	4,863	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	3,318	4,592	4,863	-	-	-	-	-	-
Total Requirements by Object	4,525	5,412	6,750	6,750	-	7,490	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

HARRIET TUBMAN MS RELOCATION FUND (437)

The Harriet Tubman Relocation Fund is used to manage capital expenditures specifically designated for the relocation of Harriet Tubman Middle School.

The District was tasked with the relocation of Harriet Tubman Middle School; this effort was in response to the Oregon Department of Transportation's decision to expand Interstate 5. The District budgeted $141.5 million to support this initiative; funding was provided through a state grant. However, the project is now paused due to funding-related project delays with the Oregon Department of Transportation's efforts to expand Interstate 5.

This creation of the fund was authorized by the Board of Directors per Board Resolution No. 6712 on May 23, 2023.

Fund 437 - Harriet Tubman MS Relocation Fund Detail

Resources by Object - 437 - Harriet Tubman MS Relocation (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	13,500	139,000	-	-
377000 - Fund Balance-Unres/Undes	-	3,012	8,328	-	-	-	-
Subtotal - Beginning Fund Balance	-	3,012	8,328	13,500	139,000	-	-
415100 - Interest on Investments	3,012	5,316	6,754	-	2,500	-	-
Subtotal - Other Revenue from Local Sources	3,012	5,316	6,754	-	2,500	-	-
432990 - Restricted State Grants	101	38	-	-	-	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	101	38	-	-	-	-	-
Total Resources by Object	3,113	8,366	15,083	13,500	141,500	-	-

Requirements by Function - 437 - Harriet Tubman MS Relocation (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
4150 - Bldg Acquis/Constr/Improv Svcs	101	38	-	13,500	-	141,500	-	-	-
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	101	38	-	13,500	-	141,500	-	-	-
71100 - Ending Fund Balance	3,012	8,328	15,083	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	3,012	8,328	15,083	-	-	-	-	-	-
Total Requirements by Function	3,113	8,366	15,083	13,500	-	141,500	-	-	-

Requirements by Object - 437 - Harriet Tubman MS Relocation (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
532900 - Other Property Services	40	10	-	-	-	-	-	-	-
538500 - Management Services	56	28	-	-	-	-	-	-	-
Subtotal - 300 - PURCHASED SERVICES	97	38	-	-	-	-	-	-	-
552000 - Building Acquisition/Improvmnt	-	-	-	13,500	-	141,500	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	-	-	-	13,500	-	141,500	-	-	-
567100 - Permits	4	-	-	-	-	-	-	-	-
Subtotal - Other Objects	4	-	-	-	-	-	-	-	-
376520 - Budgeted Ending Fund Balance	3,012	8,328	15,083	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	3,012	8,328	15,083	-	-	-	-	-	-
Total Requirements by Object	3,113	8,366	15,083	13,500	-	141,500	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

FACILITIES CAPITAL FUND (438)

The Facilities Capital Fund is used to manage capital expenditures for specifically designated capital projects, as part of the District's continuing facilities capital project efforts.

This creation of the fund was authorized by the Board of Directors per Board Resolution No. 4600 on May 14, 2012.

Fund 438 - Facilities Capital Fund Detail

Resources by Object - 438 - Facilities Capital Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	500	500	-	-
377000 - Fund Balance-Unres/Undes	85	(1,313)	(2,562)	-	-	-	-
Subtotal - Beginning Fund Balance	85	(1,313)	(2,562)	500	500	-	-
419910 - Miscellaneous	-	99	(131)	-	250	-	-
Subtotal - Other Revenue from Local Sources	-	99	(131)	-	250	-	-
422000 - Restricted Revenue	-	-	1	-	-	-	-
Subtotal - 2000 - REVENUE - INTERMEDIATE SOURCES	-	-	1	-	-	-	-
432990 - Restricted State Grants	2,009	2,865	1,163	2,000	508	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	2,009	2,865	1,163	2,000	508	-	-
453000 - Sale of Fixed Assets	-	-	-	20,000	-	-	-
453100 - Comp for Loss of Fixed Assets	-	10,300	18,585	9,591	-	-	-
Subtotal - All Other Budget Resources	-	10,300	18,585	29,591	-	-	-
Total Resources by Object	2,095	11,951	17,055	32,091	1,258	-	-

Requirements by Function - 438 - Facilities Capital Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
2490 - OTHER SCHOOL SUPPORT ADMIN	-	-	29	-	-	-	-	-	-
2520 - FISCAL SERVICES	6	4	195	-	-	-	-	-	-
Subtotal - 2000 - SUPPORT SERVICES	6	4	224	-	-	-	-	-	-
3300 - COMMUNITY SVCS	-	-	-	1,301	-	-	-	-	-
Subtotal - 3000 - ENTERPRISE AND COMMUNITY SVCS	-	-	-	1,301	-	-	-	-	-
4110 - Service Area Direction	-	-	214	-	-	-	-	-	-
4150 - Bldg Acquis/Constr/Improv Svcs	3,402	14,509	17,247	30,791	**0.75**	1,258	-	-	-
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	3,402	14,509	17,460	30,791	**0.75**	1,258	-	-	-
71100 - Ending Fund Balance	(1,313)	(2,562)	(629)	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	(1,313)	(2,562)	(629)	-	-	-	-	-	-
Total Requirements by Function	2,095	11,951	17,055	32,091	**0.75**	1,258	-	-	-

Requirements by Object - 438 - Facilities Capital Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
511210 - Classified - Represented	-	-	41	-	-	-	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
511220 - Non-Represented Staff	-	-	-	70	**0.75**	-	-	-	-
512100 - Substitutes - Licensed	-	194	3	-	-	-	-	-	-
512300 - Temporary Misc - Licensed	-	19	-	-	-	-	-	-	-
513300 - Extended Hours	-	47	71	-	-	-	-	-	-
513400 - Overtime Pay	-	1	4	-	-	-	-	-	-
Subtotal - 100 - SALARIES	-	261	119	70	**0.75**	-	-	-	-
521000 - PERS	-	-	-	3	-	-	-	-	-
521310 - PERS UAL	-	30	19	12	-	-	-	-	-
522000 - Social Security - FICA	-	20	9	5	-	-	-	-	-
523200 - Unemployment Compensation	-	7	-	-	-	-	-	-	-
523300 - PFMLA	-	1	1	-	-	-	-	-	-
524100 - Group Health Insurance	-	3	28	16	-	-	-	-	-
524300 - Retiree Health Insurance	-	1	1	-	-	-	-	-	-
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	-	63	58	38	-	-	-	-	-
531800 - Local Mtgs/Non-Instr Staff Dev	-	1	-	-	-	-	-	-	-
532200 - Repairs and Maintenance Svcs	-	153	263	-	-	-	-	-	-
532400 - Rentals	-	621	675	-	-	-	-	-	-
532500 - Electricity	-	-	4	-	-	-	-	-	-
532900 - Other Property Services	-	-	7	-	-	-	-	-	-
535100 - Telephone	-	9	19	-	-	-	-	-	-
538200 - Legal Services	-	16	48	-	-	-	-	-	-
538300 - Architect and Engineering Svcs	-	19	33	-	-	-	-	-	-
538940 - Professional Moving Services	-	49	124	-	-	-	-	-	-
538990 - Non-Instr Pers/Professional Sv	-	96	593	5,184	-	750	-	-	-
Subtotal - 300 - PURCHASED SERVICES	-	965	1,766	5,184	-	750	-	-	-
541000 - Consumable Supplies	-	37	90	1,301	-	-	-	-	-
541400 - Maintenance Materials	-	-	1	-	-	-	-	-	-
541600 - Interdepartmental Charges	-	9	14	-	-	-	-	-	-
546000 - Non-Consumable Supplies	-	101	218	-	-	-	-	-	-
546100 - Minor Equipment - Tagged	-	6	-	-	-	-	-	-	-
547000 - Computer Software	-	1	-	-	-	-	-	-	-
548000 - Computer Equipment	-	5	5	-	-	-	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	-	158	328	1,301	-	-	-	-	-
552000 - Building Acquisition/Improvmnt	3,402	1,784	1,342	25,500	-	508	-	-	-
553000 - Improvements - Not Buildings	-	11,125	8,034	-	-	-	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	3,402	12,909	9,377	25,500	-	508	-	-	-
564000 - Dues and Fees	-	6	29	-	-	-	-	-	-
565300 - Property Insurance Premiums	6	4	-	-	-	-	-	-	-
565930 - Deductible Insurance Loss	-	13	6,000	-	-	-	-	-	-
567100 - Permits	-	135	8	-	-	-	-	-	-
Subtotal - Other Objects	6	158	6,037	-	-	-	-	-	-
376520 - Budgeted Ending Fund Balance	(1,313)	(2,562)	(629)	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	(1,313)	(2,562)	(629)	-	-	-	-	-	-
Total Requirements by Object	2,095	11,951	17,055	32,091	**0.75**	1,258	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

CAPITAL ASSET RENEWAL FUND (445)

This Capital Asset Renewal Fund is used to manage capital expenditures for specifically designated capital projects, as part of the District's continuing Capital Asset Renewal Program. Refer to the District's Policy 8.70.044-P. The Capital Asset Renewal Funds and Plans policy was adopted January 23, 2012.

This fund was formally created as part of the District's 2012-13 budget process.

Fund 445 - Capital Asset Renewal Fund Detail

Resources by Object - 445 - Capital Asset Renewal Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
377000 - Fund Balance-Unres/Undes	5,051	2,302	768	-	-	-	-
Subtotal - Beginning Fund Balance	5,051	2,302	768	-	-	-	-
415100 - Interest on Investments	73	82	64	-	-	-	-
419114 - CUB Athletic Field Use Fees	55	190	320	250	300	-	-
Subtotal - Other Revenue from Local Sources	128	273	384	250	300	-	-
443000 - Restr Rev-Fed Govt Direct	9,304	-	-	-	-	-	-
Subtotal - 4000 - REVENUE FROM FEDERAL SOURCES	9,304	-	-	-	-	-	-
452100 - Interfund Transfers	610	810	-	1,000	-	-	-
Subtotal - 5200 - INTERFUND TRANSFERS	610	810	-	1,000	-	-	-
Total Resources by Object	15,092	3,385	1,152	1,250	300	-	-

Requirements by Function - 445 - Capital Asset Renewal Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
2540 - OPER/MAINTENANCE OF PLANT SVCS	10	-	-	-	-	-	-	-	-
Subtotal - 2000 - SUPPORT SERVICES	10	-	-	-	-	-	-	-	-
4150 - Bldg Acquis/Constr/Improv Svcs	3,477	2,617	1,103	1,250	-	300	-	-	-
4180 - OTHER CAPITAL ITEMS	9,304	-	-	-	-	-	-	-	-
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	12,780	2,617	1,103	1,250	-	300	-	-	-
71100 - Ending Fund Balance	2,302	768	49	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	2,302	768	49	-	-	-	-	-	-
Total Requirements by Function	15,092	3,385	1,152	1,250	-	300	-	-	-

Requirements by Object - 445 - Capital Asset Renewal Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
532200 - Repairs and Maintenance Svcs	612	711	525	-	-	-	-	-	-
532900 - Other Property Services	114	80	26	-	-	-	-	-	-
535500 - Printing and Binding	5	-	-	-	-	-	-	-	-
538200 - Legal Services	-	54	-	-	-	-	-	-	-
538300 - Architect and Engineering Svcs	312	93	1	-	-	-	-	-	-
538940 - Professional Moving Services	2	-	-	-	-	-	-	-	-
538990 - Non-Instr Pers/Professional Sv	91	23	53	-	-	-	-	-	-
Subtotal - 300 - PURCHASED SERVICES	1,136	962	604	-	-	-	-	-	-
541000 - Consumable Supplies	13	-	-	-	-	-	-	-	-
546000 - Non-Consumable Supplies	1	7	23	-	-	-	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
548000 - Computer Equipment	9,326	-	-	-	**-**	-	-	-	**-**
Subtotal - 400 - SUPPLIES AND MATERIALS	9,340	7	23	-	**-**	-	-	-	**-**
552000 - Building Acquisition/Improvmnt	1,269	875	386	1,250	**-**	300	-	-	**-**
553000 - Improvements - Not Buildings	954	559	120	-	**-**	-	-	-	**-**
554100 - Initial and Addl Equipment	-	186	1	-	**-**	-	-	-	**-**
Subtotal - 500 - CAPITAL OUTLAY	2,224	1,619	506	1,250	**-**	300	-	-	**-**
564000 - Dues and Fees	29	15	(34)	-	**-**	-	-	-	**-**
567100 - Permits	61	14	3	-	**-**	-	-	-	**-**
Subtotal - Other Objects	90	29	(30)	-	**-**	-	-	-	**-**
376520 - Budgeted Ending Fund Balance	2,302	768	49	-	**-**	-	-	-	**-**
Subtotal - 376520 - Budgeted Ending Fund Balance	2,302	768	49	-	**-**	-	-	-	**-**
Total Requirements by Object	15,092	3,385	1,152	1,250	**-**	300	-	-	**-**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

GO BONDS FUND (450)

These funds are used to manage capital expenditures for specifically authorized projects funded by General Obligation bonds under the voter-approved 2012, 2017, 2020, and 2025 bond measures. Examples of capital expenditures are school modernizations, renovations, and improvements (such as seismic upgrades, roof replacement, etc.).

Learn more about the bond program: bond.pps.net/about

See the program schedule and budget overview: ppsbondhub.com

The creation of this fund was authorized in accordance with Board Resolution No. 4416 on February 28, 2011.

Fund 450 - GO Bonds Fund Detail

Resources by Object - 450 - GO BONDS (General Obligation) (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	495,705	1,204,070	-	-
377000 - Fund Balance-Unres/Undes	500,555	721,222	463,485	-	-	-	-
Subtotal - Beginning Fund Balance	500,555	721,222	463,485	495,705	1,204,070	-	-
415100 - Interest on Investments	12,300	31,368	18,971	7,977	26,390	-	-
Subtotal - Other Revenue from Local Sources	12,300	31,368	18,971	7,977	26,390	-	-
451100 - Bond Proceeds	420,000	-	79,480	85,000	-	-	-
451200 - Bond Premium	44,832	-	149	-	-	-	-
Subtotal - All Other Budget Resources	464,832	-	79,629	85,000	-	-	-
Total Resources by Object	977,687	752,590	562,085	588,682	1,230,460	-	-

Requirements by Function - 450 - GO BONDS (General Obligation) (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Function									
2190 - SVC DIRECTION-STUDENT SUPPORT	-	-	17	-	-	-	-	-	-
2320 - EXECUTIVE ADMINISTRATION SVCS	-	-	96	132	**1.00**	-	-	-	-
2410 - OFFICE OF THE PRINCIPAL SVCS	-	-	28	200	**1.00**	-	-	-	-
2510 - SUPPORT SERVICES-BUSINESS	-	-	4	-	-	-	-	-	-
2520 - FISCAL SERVICES	2,964	1,010	1,194	1,501	-	1,501	-	-	-
2540 - OPER/MAINTENANCE OF PLANT SVCS	-	40	1	-	-	-	-	-	-
2570 - INTERNAL SERVICES	146	31	1	-	-	-	-	-	-
2660 - TECHNOLOGY SERVICES	174	138	144	161	**0.80**	-	-	-	-
Subtotal - 2000 - SUPPORT SERVICES	3,285	1,220	1,484	1,995	**2.80**	1,501	-	-	-
4110 - Service Area Direction	5,305	6,186	6,292	6,976	**38.00**	5,413	-	-	**28.00**
4150 - Bldg Acquis/Constr/Improv Svcs	221,170	262,851	124,404	561,094	**5.00**	1,130,302	-	-	-
4180 - OTHER CAPITAL ITEMS	26,705	18,848	15,230	18,617	-	93,243	-	-	-
Subtotal - 4000 - FACILITIES ACQUISITION AND CON	253,180	287,886	145,926	586,687	**43.00**	1,228,958	-	-	**28.00**
71100 - Ending Fund Balance	721,222	463,485	414,675	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	721,222	463,485	414,675	-	-	-	-	-	-
Total Requirements by Function	977,687	752,590	562,085	588,682	**45.80**	1,230,460	-	-	**28.00**

Requirements by Object - 450 - GO BONDS (General Obligation) (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
Requirements by Object									
511210 - Classified - Represented	180	159	90	213	**3.00**	-	-	-	-
511220 - Non-Represented Staff	3,720	4,188	4,508	4,924	**40.80**	2,959	-	-	**24.25**
511310 - Administrators - Licensed	-	56	73	152	**1.00**	315	-	-	**2.00**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
511320 - Administrators - NonLicensed	-	-	-	-	**-**	210	-	-	**1.00**
511420 - Directors/Program Admins	230	256	201	192	**1.00**	119	-	-	**0.75**
512400 - Temporary Misc - Classified	12	17	6	-	**-**	-	-	-	**-**
513300 - Extended Hours	60	81	141	-	**-**	1	-	-	**-**
513400 - Overtime Pay	1	-	6	-	**-**	31	-	-	**-**
513510 - Group Hlth Opt Out Lic	20	26	27	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	4,222	4,785	5,053	5,482	**45.80**	3,634	-	-	**28.00**
521000 - PERS	-	-	-	230	**-**	152	-	-	**-**
521310 - PERS UAL	675	699	767	953	**-**	683	-	-	**-**
522000 - Social Security - FICA	317	362	384	419	**-**	278	-	-	**-**
523100 - Workers' Compensation	32	25	(2)	37	**-**	14	-	-	**-**
523200 - Unemployment Compensation	1	50	2	5	**-**	14	-	-	**-**
523300 - PFMLA	-	19	26	25	**-**	21	-	-	**-**
524100 - Group Health Insurance	597	640	670	951	**-**	629	-	-	**-**
524200 - Other Employer Paid Benefits	21	24	25	10	**-**	7	-	-	**-**
524300 - Retiree Health Insurance	20	20	17	26	**-**	17	-	-	**-**
524530 - Early Retirement Benefits	6	7	6	9	**-**	5	-	-	**-**
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	1,670	1,845	1,896	2,666	**-**	1,821	-	-	**-**
531200 - Instr Program Improvement Svcs	332	-	130	-	**-**	224	-	-	**-**
531800 - Local Mtgs/Non-Instr Staff Dev	32	6	18	-	**-**	153	-	-	**-**
532200 - Repairs and Maintenance Svcs	1,081	3,814	719	-	**-**	13,460	-	-	**-**
532400 - Rentals	322	55	12	-	**-**	80	-	-	**-**
532500 - Electricity	273	111	113	-	**-**	1,177	-	-	**-**
532600 - Fuel	-	233	1	-	**-**	-	-	-	**-**
532900 - Other Property Services	2,825	472	934	-	**-**	8,667	-	-	**-**
533110 - Reimb - School Bus	-	-	-	-	**-**	1	-	-	**-**
534100 - Travel, Local in District	4	7	5	-	**-**	17	-	-	**-**
534200 - Travel, Out of District	6	7	4	-	**-**	-	-	-	**-**
535100 - Telephone	13	11	12	-	**-**	75	-	-	**-**
535400 - Advertising	3	50	76	-	**-**	470	-	-	**-**
535500 - Printing and Binding	180	18	4	-	**-**	160	-	-	**-**
538100 - Audit Services	192	173	274	-	**-**	1,119	-	-	**-**
538200 - Legal Services	215	17	483	-	**-**	10,300	-	-	**-**
538300 - Architect and Engineering Svcs	18,131	21,894	23,933	78,261	**-**	113,492	-	-	**-**
538500 - Management Services	3,375	4,702	5,766	37,262	**-**	111,623	-	-	**-**
538940 - Professional Moving Services	514	857	1,019	-	**-**	2,344	-	-	**-**
538980 - Laundering Services	3	-	-	-	**-**	-	-	-	**-**
538990 - Non-Instr Pers/Professional Sv	1,741	1,885	1,988	-	**-**	8,038	-	-	**-**
Subtotal - 300 - PURCHASED SERVICES	29,240	34,311	35,490	115,523	**-**	271,400	-	-	**-**
541000 - Consumable Supplies	59	51	264	-	**-**	25	-	-	**-**
541400 - Maintenance Materials	-	-	7	-	**-**	281	-	-	**-**
541600 - Interdepartmental Charges	13	14	35	-	**-**	133	-	-	**-**
542100 - Textbook Expansion	1,912	46	-	-	**-**	267	-	-	**-**
542200 - Textbook Adoption	15,822	7,008	4,613	13,921	**-**	34,819	-	-	**-**
543000 - Library Books	155	58	-	-	**-**	12	-	-	**-**
546000 - Non-Consumable Supplies	924	1,050	1,524	-	**-**	-	-	-	**-**
546100 - Minor Equipment - Tagged	-	-	362	-	**-**	-	-	-	**-**

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Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
547000 - Computer Software	3,354	2,161	1,006	-	-	19,829	-	-	-
548000 - Computer Equipment	(151)	4,151	1,740	4,180	-	5,102	-	-	-
Subtotal - 400 - SUPPLIES AND MATERIALS	22,087	14,540	9,551	18,101	-	60,468	-	-	-
551000 - Land Acquisition	-	-	-	-	-	396	-	-	-
552000 - Building Acquisition/Improvmnt	182,094	224,452	78,130	441,216	-	799,343	-	-	-
553000 - Improvements - Not Buildings	119	98	696	-	-	16,257	-	-	-
554100 - Initial and Addl Equipment	4,776	3,122	13,218	-	-	17,939	-	-	-
554110 - Vehicles	44	-	-	-	-	-	-	-	-
555010 - Computers	3,542	1,778	460	-	-	9,347	-	-	-
555030 - Software Capital Expense	429	396	-	-	-	-	-	-	-
555090 - Misc Other Technology	4	2	2	-	-	11,912	-	-	-
559000 - Other Capital Outlay	-	-	279	-	-	-	-	-	-
Subtotal - 500 - CAPITAL OUTLAY	191,009	229,848	92,785	441,216	-	855,194	-	-	-
561000 - Redemption of Principal	268	-	-	-	-	-	-	-	-
562000 - Interest	2	-	-	-	-	-	-	-	-
563000 - Fiscal Charges	2	2	5	-	-	63	-	-	-
564000 - Dues and Fees	92	87	89	-	-	480	-	-	-
564100 - Bond Issuance Cost	1,811	-	278	-	-	10,858	-	-	-
565100 - Liability Insurance	-	-	-	5,694	-	5,658	-	-	-
565300 - Property Insurance Premiums	2,403	2,359	693	-	-	10,520	-	-	-
565500 - Judgmnts&Settlemnts Against	750	-	-	-	-	-	-	-	-
567100 - Permits	2,908	1,328	377	-	-	10,364	-	-	-
567200 - Public Assessments	-	-	1,193	-	-	-	-	-	-
Subtotal - Other Objects	8,236	3,777	2,635	5,694	-	37,943	-	-	-
376520 - Budgeted Ending Fund Balance	721,222	463,485	414,675	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	721,222	463,485	414,675	-	-	-	-	-	-
Total Requirements by Object	977,687	752,590	562,085	588,682	**45.80**	1,230,460	-	-	**28.00**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

BOND PROGRAM SUMMARY

In November 2012, May 2017, November 2020, and May 2025 Portland voters overwhelmingly supported capital improvement bonds totaling nearly $4.3 billion to upgrade PPS schools. The majority of PPS schools were built before World War II, and are in need of significant remodeling and modernization.

The $482 million 2012 School Building Improvement Bond enabled the district to make improvements to 51 schools. In addition, Franklin, Grant and Roosevelt High Schools were completely modernized and Faubion PK-8 was completely rebuilt. The 2012 improvement bond work also included:

- Seismic improvements
- New seismically strengthened roofs
- Accessibility improvements, including new elevators
- Science classroom upgrades

The planned work of the 2012 Bond is now complete, with minor funding remaining that may be used for bond-compensable projects once all other project funding reconciliations are complete.

The $790 million May 2017 Health, Safety and Modernization Bond is currently underway and reaching every school in the district. That work includes:

- Water quality improvements
- Roof replacements, including roof-level seismic improvements
- Security upgrades at all District schools
- Lead paint remediation
- Asbestos remediation
- Radon remediation
- Improving fire safety with the installation of new alarm and sprinkler systems
- ADA upgrades and improvements

Modernization work funded by the 2017 bond is nearly complete. McDaniel High School (formerly known as Madison High School) has been completely modernized and a new Kellogg Middle School has been built. Both schools opened to students in fall of 2021. Construction of a new Lincoln High School began in January of 2020, and the new building opened in fall of 2022, and the new athletic fields were completed in 2023. Construction for the modernization of Benson Polytechnic High School began in summer of 2021, and the school opened to students in the fall of 2024.

The $1.2 billion November 2020 Bond work includes:

- Replacing textbooks and curriculum materials
- Providing students with tablets and laptops and updating classroom and district technology
- Updating special education learning spaces

- Providing every school in the District with ground floor accessibility that meets requirements of the Americans with Disabilities Act (ADA)
- Replacing school roofs
- Partnering with grant funds to seismically retrofit select schools
- Replacing whole, or components of, heating, cooling and ventilation systems
- Addressing building modifications needed to support school enrollment or capacity changes
- Updating security cameras, intrusion alarm systems and classroom door locks

The measure also provides funding to modernize Jefferson High School, construct a new hayu alqi uyxat building (formerly known as Multiple Pathways to Graduation) on the Benson campus, and complete master planning and design for Cleveland High School, Ida B. Wells (formerly Wilson) High School modernization projects, and additional capacity at Roosevelt High School. Funding is also included for a facility to house the Center for Student Excellence program.

In May 2025, Portland voters passed a $1.83 billion bond. The measure authorizes up to $1.83 billion in principal amount of general obligation bonds for facilities and education investments. The May 2025 School Bond work includes:

- Updating and repairing aging elementary and middle schools with a focus on updating/replacing major building systems, including roofs, siding, heating/cooling
- Updating safety and security systems
- Seismic upgrades
- Renovating/replacing schools, including Cleveland, Ida B. Wells (formerly Wilson)
- Upgrading curriculum materials and technology, including student devices
- Upgrading/expanding high school athletic facilities; creating district-wide athletic hubs at Jackson and Marshall
- Updating high school performing arts/theater facilities

Additional Resources on Bond Projects

For more information on bond-funded projects, including financial information, access bond.pps.net/about.

Work funded by the 2025 bond has begun. See program schedule and budget overview: ppsbondhub.com.

OTHER CAPITAL PROJECTS

The Real Estate, Infrastructure and School Enhancement (RISE) Projects and Construction group manages planned, volunteer, and emergency repair/replacement work across the District. Projects range in scope and size from very small repair projects, to large capital replacement projects such as mechanical system replacements. The work is categorized into seven categories: Health & Safety, Warm & Dry, Security, Legal/Regulatory, Delivery of Instruction, Delivery of Support Services, and Energy. Examples of the type of projects included in each category can be seen at the bottom of the report.

Project Management Proposed 2026-27							
Category/Fund	**191**	**404**	**435**	**437**	**438**	**445**	**Grand Total**
	General Funds	**Construction Excise Fund**	**Energy Efficient Schools Fund**	**Harriet Tubman Relocation Fund**	**Facilities Capital Fund**	**Capital Asset Renewal Fund**	
Health & Safety	-	378,091	-	-	-	119,630	**497,721**
Warm & Dry	-	-	-	-	-	44,111	**44,111**
Security	-	2,087	-	-	-	-	**2,087**
Legal/Regulatory	-	-	-	-	-	-	**-**
Delivery of Instruction	-	338	-	-	-	-	**338**
Delivery of Support Services	-	-	-	-	-	66,266	**66,266**
Energy	-	59,389	7,490,000	-	-	-	**7,549,389**
Maintenance	-	-	-	-	-	-	**-**
Restricted Grants/Funds	-	-	-	141,500,000	508,103	-	**142,008,103**
Projects in Process	-	-	-	-	250,000	-	**250,000**
Budget to be Programmed	-	223,633	-	-	500,000	69,993	**793,626**
Fund Totals	**-**	**663,538**	**7,490,000**	**141,500,000**	**1,258,103**	**300,000**	**151,211,641**

Project Management Adopted 2025-26							
Category/Fund	**191**	**404**	**435**	**437**	**438**	**445**	**Grand Total**
	General Funds	**Construction Excise Fund**	**Energy Efficient Schools Fund**	**Harriet Tubman Relocation Fund**	**Facilities Capital Fund**	**Capital Asset Renewal Fund**	
Health & Safety	217,103	8,813	-	-	-	370,802	**596,719**
Warm & Dry	135,585	13,572	-	-	-	304,799	**453,957**
Security	85,800	11,071	-	-	-	78,498	**175,369**
Legal/Regulatory	25,652	8,342	-	-	-	-	**33,993**
Delivery of Instruction	47,808	5,464	-	-	-	81,220	**134,492**
Delivery of Support Services	441,357	6,037	-	-	-	414,681	**862,074**
Energy	28,247	1,807	6,750,000	-	-	-	**6,780,054**
Maintenance	-	-	-	-	-	-	**-**
Restricted Grants/Funds	-	109,108	-	13,500,000	21,484,197	-	**35,093,305**
Projects in Process	-	67,157	-	-	10,000,000	-	**10,067,157**
Budget to be Programmed	15,056	129,211	-	-	500,000	-	**644,267**
Fund Totals	**996,606**	**360,583**	**6,750,000**	**13,500,000**	**31,984,197**	**1,250,000**	**54,841,386**

Project Management Actuals 2024-25							
Category/Fund	**191**	**404**	**435**	**437**	**438**	**445**	**Grand Total**
	General Funds	**Construction Excise Fund**	**Energy Efficient Schools Fund**	**Harriet Tubman Relocation Fund**	**Facilities Capital Fund**	**Capital Asset Renewal Fund**	
Health & Safety	371,179	393,645	-	-	-	488,255	**1,253,079**
Warm & Dry	11,490	257,615	-	-	-	414,241	**683,346**
Security	156,038	43,509	-	-	-	-	**199,547**
Legal/Regulatory	65,699	-	-	-	-	48,059	**113,759**
Delivery of Instruction	18,900	78,900	-	-	-	250	**98,049**
Delivery of Support Services	86,440	-	-	-	-	152,654	**239,094**
Energy	-	2,122	1,227,108	-	846	-	**822,605**
Maintenance	-	-	-	-	-	-	**-**
Restricted Grants/Funds	-	-	-		17,239,925	-	**17,239,925**
Projects in Process	-	-	-	-	443,219	-	**443,219**
Budget to be Programmed	-	-	-	-	-	-	**-**
Fund Totals	**709,747**	**775,791**	**1,227,108**	**-**	**17,683,989**	**1,103,458**	**21,092,622**

Category	Examples
Health & Safety	Projects include abatement, structural, radon mitigation
Warm & Dry	Projects include heating or cooling improvements, roof repairs, water or sewer lines
Security	Projects include access controls, cameras, card readers
Legal/Regulatory	Projects include fire marshall citations, code compliance requirements, backflows, etc.
Delivery of Instruction:	Kilns, modulars, playgrounds, classroom changes and other projects that impact students and the learning environments
Delivery of Support Services	Dishwashers, water heaters, asphalt repairs and other projects that are overall district supports
Energy	Energy improvement projects to include control upgrads, LED lighting etc
Restricted Grants/Funds	Funds received for projects and can only be spent on those projects ie Seismic Rehabilitation Grant Program(SRGP) and Oregon School Capital Improvement Matching (OSCIM) grants
Budget to be Programmed	Funding not currently assigned to a project

INTERNAL SERVICE FUNDS SUMMARY (600)

Fund 600 - Internal Service Fund Resources Summary

Fund 600 resources is budgeted at $21.2 million and include earnings on investments, insurance recoveries, reimbursements from the Oregon Employer at Injury Program (EAIP), and revenues generated from payroll funds solely for the workers' compensation self-insurance program. Since 2024-25, Internal Service Funds budget includes two new sub-funds: Fund 602 Property & Liability Insurance and Fund 603 Unemployment.

Fund 600 - Internal Service Fund Requirements Summary

Portland Public Schools is authorized by the State of Oregon as a workers' compensation self-insured employer. This fund accounts for costs in the program. An excess insurance policy is purchased to cover any claim that may exceed the self-insured retention of $1 million.

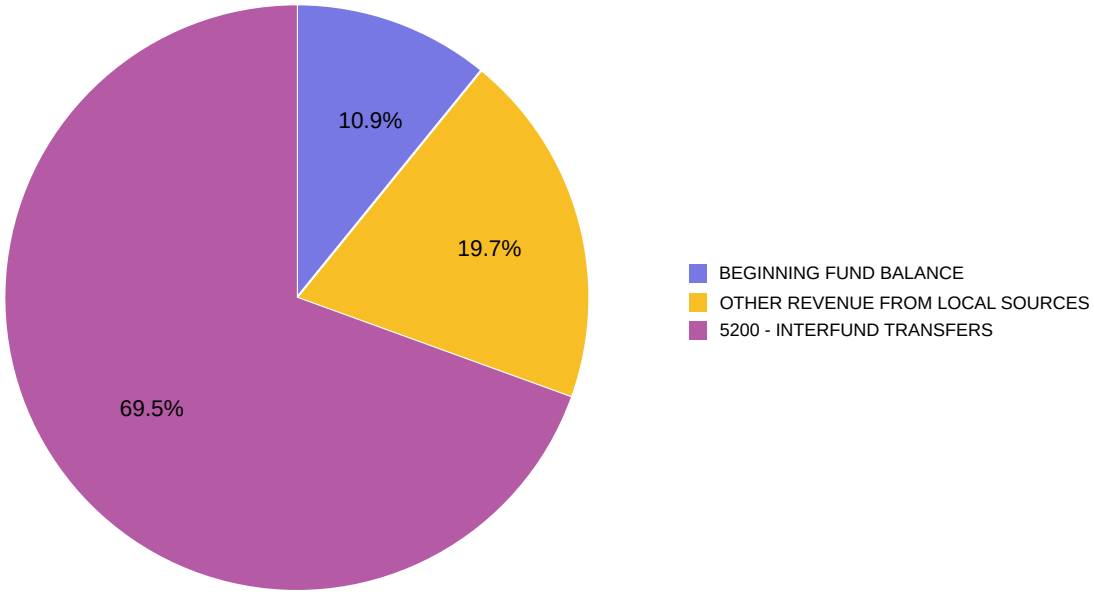
Managed by the Risk Management department, self-insurance saves taxpayer money. Greater ability exists to develop workforce injury prevention initiatives (e.g., fall protection improvements, respiratory protection, ergonomics, kiln safety improvements, stage operations safety learning for theater teachers) and initiate return-to-work programs that promote keeping injured staff meaningfully engaged in their schools and offices during recovery (e.g., light duty work stations).

Costs include employee injury claim expenses, Third Party Administrator (TPA) contract fees, staff injury prevention programs, risk control initiatives, return to work efforts, premiums for excess insurance, and the statutory reserve funds.

Summary of Resources by Major Object 600 - Internal Service Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
BEGINNING FUND BALANCE	3,303	4,148	4,397	6,500	2,300	-	-
OTHER REVENUE FROM LOCAL SOURCES	3,731	3,112	858	4,209	4,159	-	-
3000 - REVENUE FROM STATE SOURCES	460	422	499	-	-	-	-
5200 - INTERFUND TRANSFERS	-	-	10,239	14,560	14,700	-	-
Total Resources	**7,494**	**7,683**	**15,993**	**25,269**	**21,159**	**-**	**-**

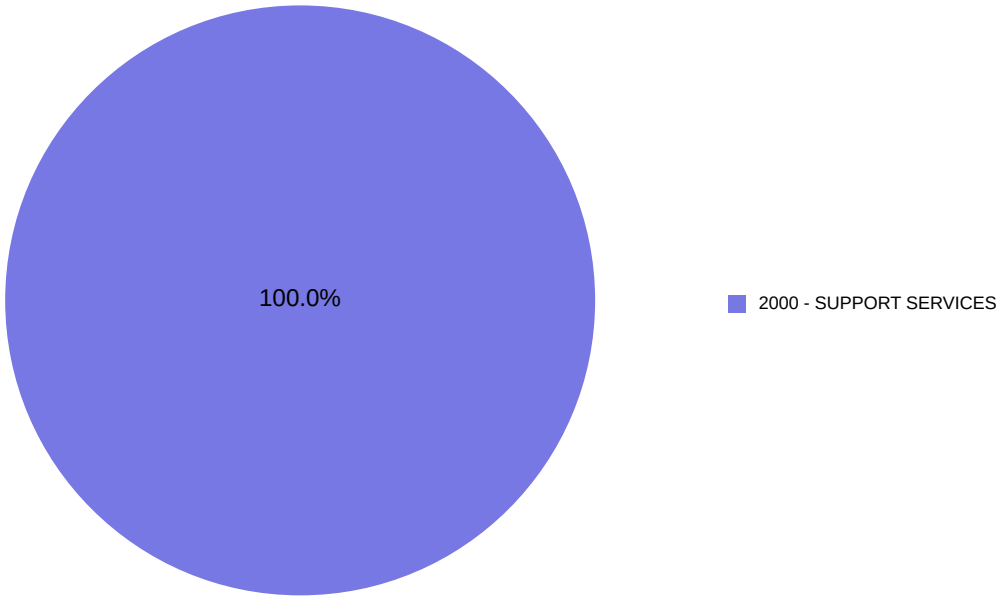
Percent of Resources by Major Object 600 - Internal Service Funds



Summary of Requirements by Major Function 600 - Internal Service Funds (in thousands)

Major Function	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
2000 - SUPPORT SERVICES	3,346	3,286	14,361	24,769	**4.00**	21,159	-	-	**3.00**
6000 - CONTINGENCIES	-	-	-	500	**-**	-	-	-	**-**
7000 - UNAPPROPRIATED FUND BALANCE	4,148	4,397	1,632	-	**-**	-	-	-	**-**
Total Requirements	**7,494**	**7,683**	**15,993**	**25,269**	**4.00**	**21,159**	**-**	**-**	**3.00**

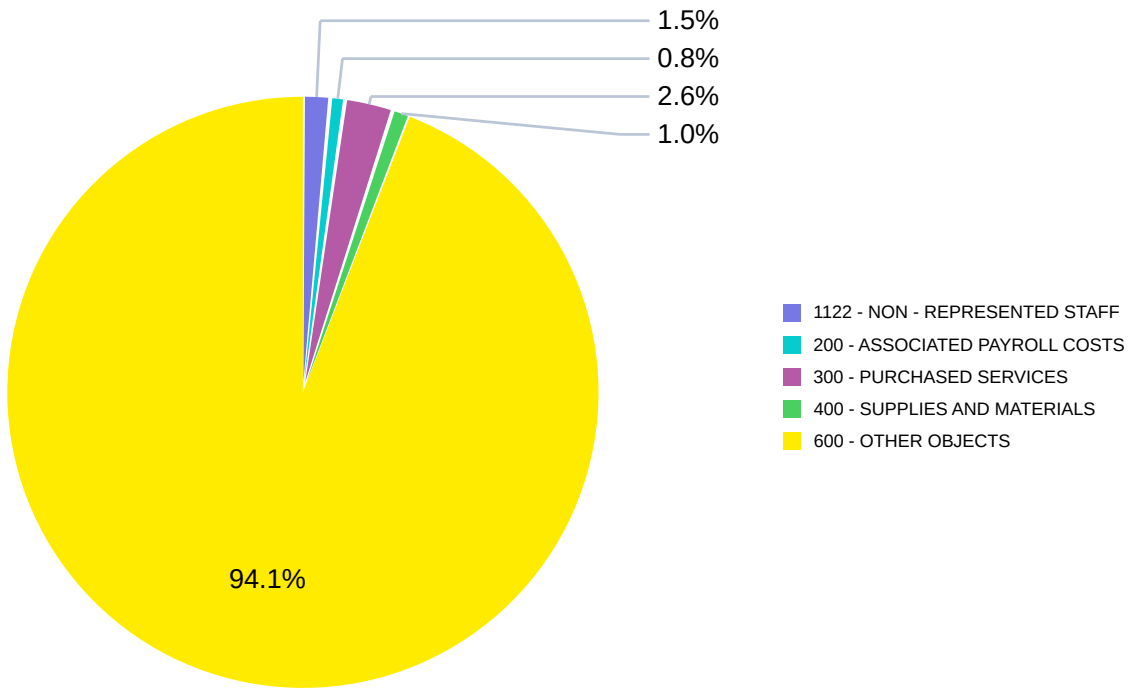
Percent of Requirements by Major Function 600 - Internal Service Funds



Summary of Requirements by Major Object 600 - Internal Service Funds (in thousands)

Major Object	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Budget FTE 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	Budget FTE 2026-27
1122 - NON - REPRESENTED STAFF	-	246	476	468	**4.00**	313	-	-	**3.00**
OTHER SALARIES	-	50	44	-	**-**	-	-	-	**-**
200 - ASSOCIATED PAYROLL COSTS	-	108	198	231	**-**	170	-	-	**-**
300 - PURCHASED SERVICES	107	336	492	557	**-**	557	-	-	**-**
400 - SUPPLIES AND MATERIALS	17	36	131	206	**-**	206	-	-	**-**
600 - OTHER OBJECTS	3,221	2,509	13,020	23,308	**-**	19,914	-	-	**-**
581000 - Operating Contingency	-	-	-	500	**-**	-	-	-	**-**
376520 - Budgeted Ending Fund Balance	4,148	4,397	1,632	-	**-**	-	-	-	**-**
Total Requirements	**7,494**	**7,683**	**15,993**	**25,269**	**4.00**	**21,159**	**-**	**-**	**3.00**

Percent of Requirements by Major Object 600 - Internal Service Funds



WORKERS COMPENSATION FUND (601)

Portland Public Schools is an Oregon authorized workers' compensation self-insured carrier. The Risk Management department runs the District's Workers' Compensation Program. Fund 601 accounts for claim expenses, Third Party Administrator (TPA) contracts, injury prevention risk control initiatives, and the statutory reserve funds. Resources in Fund 601 include earnings on investments, insurance recoveries, reimbursements from the Oregon Employer at Injury Program (EAIP), and revenues generated from payrolls from other funds solely for the District's Workers' Compensation Program.

Fund 601 - Workers Compensation Fund Detail

Resources by Object - 601 - Workers Compensation Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	1,500	1,500	-	-
377000 - Fund Balance-Unres/Undes	3,303	4,148	4,397	-	-	-	-
Subtotal - Beginning Fund Balance	3,303	4,148	4,397	1,500	1,500	-	-
415100 - Interest on Investments	164	265	227	-	100	-	-
419600 - Recovery PY Expenditure	-	-	-	-	-	-	-
419700 - Services Provided Other Funds	3,567	2,847	-	3,612	2,062	-	-
Subtotal - Other Revenue from Local Sources	3,731	3,112	227	3,612	2,162	-	-
431992 - Return To Work	460	422	499	-	-	-	-
Subtotal - 3000 - REVENUE FROM STATE SOURCES	460	422	499	-	-	-	-
Total Resources by Object	7,494	7,683	5,123	5,112	3,662	-	-

Requirements by Function - 601 - Workers Compensation Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
2520 - FISCAL SERVICES	3,346	3,286	3,992	4,612	**2.10**	3,662	-	-	**1.60**
Subtotal - 2000 - SUPPORT SERVICES	3,346	3,286	3,992	4,612	**2.10**	3,662	-	-	**1.60**
61100 - Operating Contingency	-	-	-	500	**-**	-	-	-	**-**
Subtotal - 6000 - CONTINGENCIES	-	-	-	500	**-**	-	-	-	**-**
71100 - Ending Fund Balance	4,148	4,397	1,131	-	**-**	-	-	-	**-**
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	4,148	4,397	1,131	-	**-**	-	-	-	**-**
Total Requirements by Function	7,494	7,683	5,123	5,112	**2.10**	3,662	-	-	**1.60**

Requirements by Object - 601 - Workers Compensation Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
511220 - Non-Represented Staff	-	174	154	165	**1.60**	167	-	-	**1.60**
511420 - Directors/Program Admins	-	72	97	81	**0.50**	-	-	-	**-**
512100 - Substitutes - Licensed	-	40	25	-	**-**	-	-	-	**-**
512200 - Substitutes - Classified	-	10	14	-	**-**	-	-	-	**-**
513510 - Group Hlth Opt Out Lic	-	-	4	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	-	296	294	246	**2.10**	167	-	-	**1.60**
521000 - PERS	-	-	-	10	**-**	7	-	-	**-**
521310 - PERS UAL	-	45	43	43	**-**	31	-	-	**-**
522000 - Social Security - FICA	-	23	22	19	**-**	13	-	-	**-**
523100 - Workers' Compensation	-	2	-	2	**-**	1	-	-	**-**
523200 - Unemployment Compensation	-	3	-	-	**-**	1	-	-	**-**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
523300 - PFMLA	-	1	2	1	**-**	1	-	-	**-**
524100 - Group Health Insurance	-	30	29	44	**-**	36	-	-	**-**
524200 - Other Employer Paid Benefits	-	1	1	-	**-**	-	-	-	**-**
524300 - Retiree Health Insurance	-	2	1	1	**-**	1	-	-	**-**
524530 - Early Retirement Benefits	-	1	-	-	**-**	-	-	-	**-**
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	-	108	99	121	**-**	91	-	-	**-**
532200 - Repairs and Maintenance Svcs	7	12	68	19	**-**	19	-	-	**-**
532900 - Other Property Services	11	7	17	150	**-**	150	-	-	**-**
534100 - Travel, Local in District	-	-	-	2	**-**	2	-	-	**-**
534200 - Travel, Out of District	-	-	-	2	**-**	2	-	-	**-**
535100 - Telephone	1	1	2	1	**-**	1	-	-	**-**
538990 - Non-Instr Pers/Professional Sv	88	315	364	235	**-**	235	-	-	**-**
Subtotal - 300 - PURCHASED SERVICES	107	336	450	409	**-**	409	-	-	**-**
541000 - Consumable Supplies	-	-	2	9	**-**	9	-	-	**-**
541600 - Interdepartmental Charges	-	1	-	2	**-**	2	-	-	**-**
544000 - Periodicals	-	-	-	1	**-**	1	-	-	**-**
546000 - Non-Consumable Supplies	17	7	11	31	**-**	31	-	-	**-**
547000 - Computer Software	-	27	53	27	**-**	27	-	-	**-**
548000 - Computer Equipment	-	1	2	3	**-**	3	-	-	**-**
Subtotal - 400 - SUPPLIES AND MATERIALS	17	36	67	73	**-**	73	-	-	**-**
561000 - Redemption of Principal	26	-	-	28	**-**	28	-	-	**-**
564000 - Dues and Fees	-	-	1	2	**-**	2	-	-	**-**
565350 - Work Comp Insurance Premiums	168	169	193	270	**-**	270	-	-	**-**
565910 - Worker's Comp Claim Expense	2,884	2,144	2,690	3,264	**-**	2,422	-	-	**-**
565920 - Worker's Comp Assessment	143	196	197	200	**-**	200	-	-	**-**
Subtotal - Other Objects	3,221	2,509	3,082	3,764	**-**	2,922	-	-	**-**
581000 - Operating Contingency	-	-	-	500	**-**	-	-	-	**-**
Subtotal - 581000 - Operating Contingency	-	-	-	500	**-**	-	-	-	**-**
376520 - Budgeted Ending Fund Balance	4,148	4,397	1,131	-	**-**	-	-	-	**-**
Subtotal - 376520 - Budgeted Ending Fund Balance	4,148	4,397	1,131	-	**-**	-	-	-	**-**
Total Requirements by Object	7,494	7,683	5,123	5,112	**2.10**	3,662	-	-	**1.60**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

PROPERTY & LIABILITY INSURANCE (602)

Requirements in Fund 602 Property & Liability Insurance include liability insurance, property insurance premiums, and deductible insurance loss. Resources include interfund transfers.

This fund was formally created as part of the District's 2024-25 budget process.

Fund 602 - Property & Liability Insurance Fund Detail

Resources by Object - 602 - Property & Liability Insurance (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
415100 - Interest on Investments	-	-	17	-	-	-	-
419700 - Services Provided Other Funds	-	-	113	-	-	-	-
Subtotal - Other Revenue from Local Sources	-	-	130	-	-	-	-
452100 - Interfund Transfers	-	-	10,239	14,560	14,700	-	-
Subtotal - 5200 - INTERFUND TRANSFERS	-	-	10,239	14,560	14,700	-	-
Total Resources by Object	-	-	10,369	14,560	14,700	-	-

Requirements by Function - 602 - Property & Liability Insurance (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
2520 - FISCAL SERVICES	-	-	10,369	14,560	**1.90**	14,700	-	-	**1.40**
Subtotal - 2000 - SUPPORT SERVICES	-	-	10,369	14,560	**1.90**	14,700	-	-	**1.40**
Total Requirements by Function	-	-	10,369	14,560	**1.90**	14,700	-	-	**1.40**

Requirements by Object - 602 - Property & Liability Insurance (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
511220 - Non-Represented Staff	-	-	131	142	**1.40**	146	-	-	**1.40**
511420 - Directors/Program Admins	-	-	94	81	**0.50**	-	-	-	**-**
513300 - Extended Hours	-	-	1	-	**-**	-	-	-	**-**
Subtotal - 100 - SALARIES	-	-	226	222	**1.90**	146	-	-	**1.40**
521000 - PERS	-	-	-	9	**-**	6	-	-	**-**
521310 - PERS UAL	-	-	35	39	**-**	27	-	-	**-**
522000 - Social Security - FICA	-	-	17	17	**-**	11	-	-	**-**
523100 - Workers' Compensation	-	-	-	2	**-**	1	-	-	**-**
523200 - Unemployment Compensation	-	-	-	-	**-**	1	-	-	**-**
523300 - PFMLA	-	-	1	1	**-**	1	-	-	**-**
524100 - Group Health Insurance	-	-	44	40	**-**	31	-	-	**-**
524200 - Other Employer Paid Benefits	-	-	1	-	**-**	-	-	-	**-**
524300 - Retiree Health Insurance	-	-	1	1	**-**	1	-	-	**-**
Subtotal - 200 - ASSOCIATED PAYROLL COSTS	-	-	99	110	**-**	79	-	-	**-**
531800 - Local Mtgs/Non-Instr Staff Dev	-	-	1	-	**-**	-	-	-	**-**
534100 - Travel, Local in District	-	-	1	-	**-**	-	-	-	**-**
535100 - Telephone	-	-	-	1	**-**	1	-	-	**-**
538910 - Security Services	-	-	15	-	**-**	-	-	-	**-**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
538990 - Non-Instr Pers/Professional Sv	-	-	25	146	**-**	146	-	-	**-**
Subtotal - 300 - PURCHASED SERVICES	-	-	42	148	**-**	148	-	-	**-**
541000 - Consumable Supplies	-	-	1	12	**-**	12	-	-	**-**
541100 - Loss Prevention	-	-	22	-	**-**	-	-	-	**-**
541600 - Interdepartmental Charges	-	-	15	-	**-**	-	-	-	**-**
546000 - Non-Consumable Supplies	-	-	-	83	**-**	83	-	-	**-**
547000 - Computer Software	-	-	27	35	**-**	35	-	-	**-**
548000 - Computer Equipment	-	-	-	3	**-**	3	-	-	**-**
Subtotal - 400 - SUPPLIES AND MATERIALS	-	-	64	133	**-**	133	-	-	**-**
564000 - Dues and Fees	-	-	1	-	**-**	-	-	-	**-**
565100 - Liability Insurance	-	-	1,336	1,671	**-**	1,671	-	-	**-**
565300 - Property Insurance Premiums	-	-	5,522	7,093	**-**	7,340	-	-	**-**
565930 - Deductible Insurance Loss	-	-	3,080	5,183	**-**	5,183	-	-	**-**
Subtotal - Other Objects	-	-	9,938	13,948	**-**	14,194	-	-	**-**
Total Requirements by Object	-	-	10,369	14,560	**1.90**	14,700	-	-	**1.40**

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

UNEMPLOYMENT FUND (603)

Requirements in Fund 603 Unemployment Fund include unemployment compensation claim expenses. Principal resources for the Unemployment Fund are services provided to other funds for unemployment insurance; a percentage rate is charged to other funds based on payroll expenditures.

This fund was formally created as part of the District's 2024-25 budget process.

Fund 603 - Unemployment Insurance Fund Detail

Resources by Object - 603 - Unemployment Insurance Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	Proposed 2026-27	Approved 2026-27	Adopted 2026-27
Resources by Object							
376510 - Budgeted Beginning Fund Balance	-	-	-	5,000	800	-	-
Subtotal - Beginning Fund Balance	-	-	-	5,000	800	-	-
419700 - Services Provided Other Funds	-	-	501	596	1,998	-	-
Subtotal - Other Revenue from Local Sources	-	-	501	596	1,998	-	-
Total Resources by Object	-	-	501	5,596	2,798	-	-

Requirements by Function - 603 - Unemployment Insurance Fund (in thousands)

Description by Function Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Function									
2520 - FISCAL SERVICES	-	-	-	5,596	-	2,798	-	-	-
Subtotal - 2000 - SUPPORT SERVICES	-	-	-	5,596	-	2,798	-	-	-
71100 - Ending Fund Balance	-	-	501	-	-	-	-	-	-
Subtotal - 7000 - UNAPPROPRIATED FUND BALANCE	-	-	501	-	-	-	-	-	-
Total Requirements by Function	-	-	501	5,596	-	2,798	-	-	-

Requirements by Object - 603 - Unemployment Insurance Fund (in thousands)

Description by Object Code	Actual 2022-23	Actual 2023-24	Actual 2024-25	Adopted 2025-26	**Budget FTE 2025-26**	Proposed 2026-27	Approved 2026-27	Adopted 2026-27	**Budget FTE 2026-27**
Requirements by Object									
565950 - Unemployment Comp Claim Expense	-	-	-	5,596	-	2,798	-	-	-
Subtotal - Other Objects	-	-	-	5,596	-	2,798	-	-	-
376520 - Budgeted Ending Fund Balance	-	-	501	-	-	-	-	-	-
Subtotal - 376520 - Budgeted Ending Fund Balance	-	-	501	-	-	-	-	-	-
Total Requirements by Object	-	-	501	5,596	-	2,798	-	-	-

Certain numbers have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown.

MULTNOMAH EDUCATION SERVICE DISTRICT ALLOCATION

The Multnomah Education Service District (MESD) is a public agency responsible for a variety of direct and indirect educational services to eight Multnomah County school districts as well as other public and private agencies and schools in the region. MESD's services are those best managed on a regional basis either because they are too costly for an individual district to support, or because demand for the service within a single district is limited.

MESD's core services are funded by the State School Fund, local property taxes, contracts and grants. The state allocates support to all Education Service Districts (ESD) in the state by granting each ESD a fixed share of the total ESD funding formula revenue. The ESD then allocates these funds to the participating local school districts.

The broad categories of services are Instructional Services, Special Education Services, School Health Services, Technology Services, and Administrative Support Services. There are more than 60 separate "resolution" services and programs from which component districts choose to spend their annual allocation. In addition, numerous programs are operated on a contracted or fee-for service basis. Some programs may be funded through both resolution and contract dollars.

The ESD determines the mix of services to be provided through discussions with advisory committees comprised of local school district representatives. The unit cost or actual cost for each of the services is determined by MESD.

Each participating local school district selects from a menu of services, the total cost of which shall not exceed the district's dollar allocation. Transit dollars are received from MESD as General Fund revenues in support of services that the District provides for itself. Transit dollars may be used to contract for additional services from MESD.

Transit Dollars: Funds allocated to the ESD through the State School Fund allocation model are then passed from the ESD to the District. Funds may be used by the District to purchase services from the ESD, to fund services provided directly by the District, or services may be purchased.

Resolution Dollars: Funds allocated to the ESD through the State School Fund allocation model. These funds stay at the ESD and are available to the District to purchase services. The services are selected from a menu detailed in MESD Local Service Plan.

2026-27 MESD District Service Plan

Due to the timing of the Multnomah Education Service District (MESD) budget cycle, the final 2026-27 District Service Plan selections were not available at the time of this book's publication.

The anticipated MESD apportionment is $25.9 million with pass-through funding for the 2026-27 school year at $3.8 million. PPS is working closely with MESD leadership to finalize the 2026-27 service selections.

Full details of the contracted services will be provided in the adopted version of the budget book.



Franklin High School - First Day of School, August 27, 2025

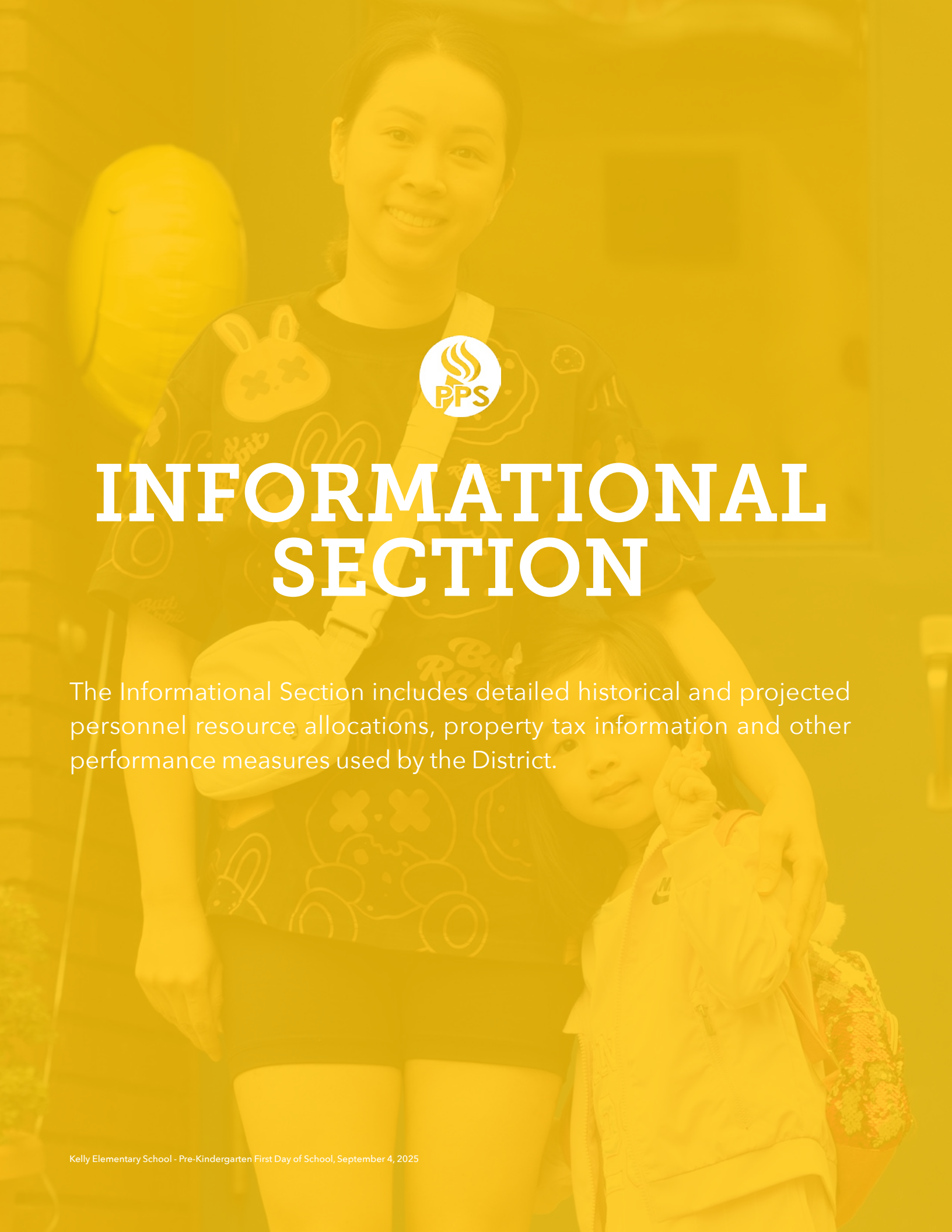


Kelly Elementary School - Leap and Summer Programs, July 2025

INFORMATIONAL SECTION

INFORMATIONAL SECTION

The Informational Section includes detailed historical and projected personnel resource allocations, property tax information and other performance measures used by the District.

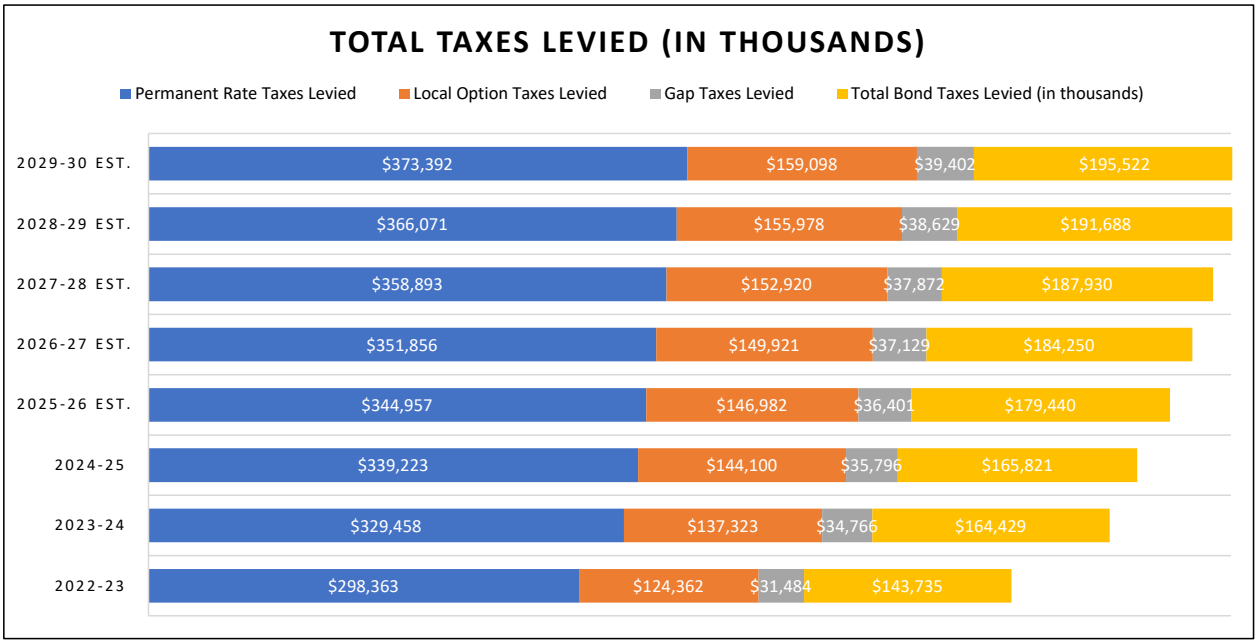


Kelly Elementary School - Pre-Kindergarten First Day of School, September 4, 2025

PORTLAND PUBLIC SCHOOLS ASSESSED VALUE OF TAXABLE PROPERTY

Fiscal Year	Residential Property	Personal Property	Total Net Assessed Value	Total Direct Rate [3]	Levy Amount Before Adjustment
Permanent Rate					
2030 [1]	$74,298,309	$3,910,437	$78,208,747	$9.7681	$767,414
2029 [1]	$72,841,480	$3,833,762	$76,675,242	$9.7681	$752,366
2028 [1]	$71,413,216	$3,758,590	$75,171,806	$9.7681	$737,615
2027 [1]	$70,012,956	$3,684,892	$73,697,849 [2]	$9.7727	$723,156
2026	$68,640,153	$3,612,640	$72,252,793 [2]	$9.7516	$704,580
2025	$67,845,435	$2,342,234	$71,051,925	$9.6019	$682,233
2024	$65,178,479	$3,113,097	$69,006,576	$9.6509	$665,976
2023	$60,087,863	$2,405,740	$62,493,603	$9.5681	$597,945

[1] Future years assume 2% increase.
[2] Latest estimates from Tax Supervising and Conservation Commission.
[3] Per $1,000 of Assessed Value



PROPERTY TAX LEVIES AND COLLECTIONS
(in thousands)

Fiscal Year	Taxes Levied Before Adjustments	Taxes Levied for the Fiscal Year	Adjustment Factor	Collected with in the Fiscal Year of the Levy		Collections in Subseqent Years [2]	Total Collections to Date	
				Amount [3]	Percentage of Levy		Amount [3]	Percentage of Levy
2027 [1]	723,156	681,517	94.24%	647,441	95.00%			
2026 [1]	704,580	664,010	94.24%	630,810	95.00%			
2025	682,233	642,950	94.24%	609,415	94.78%		609,415	94.78%
2024	665,976	635,997	95.50%	603,722	94.93%	4,098	607,820	95.57%
2023	597,945	592,538	99.10%	565,245	95.39%	5,443	570,688	96.31%
2022	572,395	567,384	99.12%	544,882	96.03%	6,293	551,175	97.14%
2021	541,949	536,371	98.97%	512,270	95.51%	7,945	520,215	96.99%

[1] Estimated

[2] Collections in subsequent years includes current year revenue received for taxes levied in prior years.

[3] Amounts are based upon the tax collection year July 1 to June 30

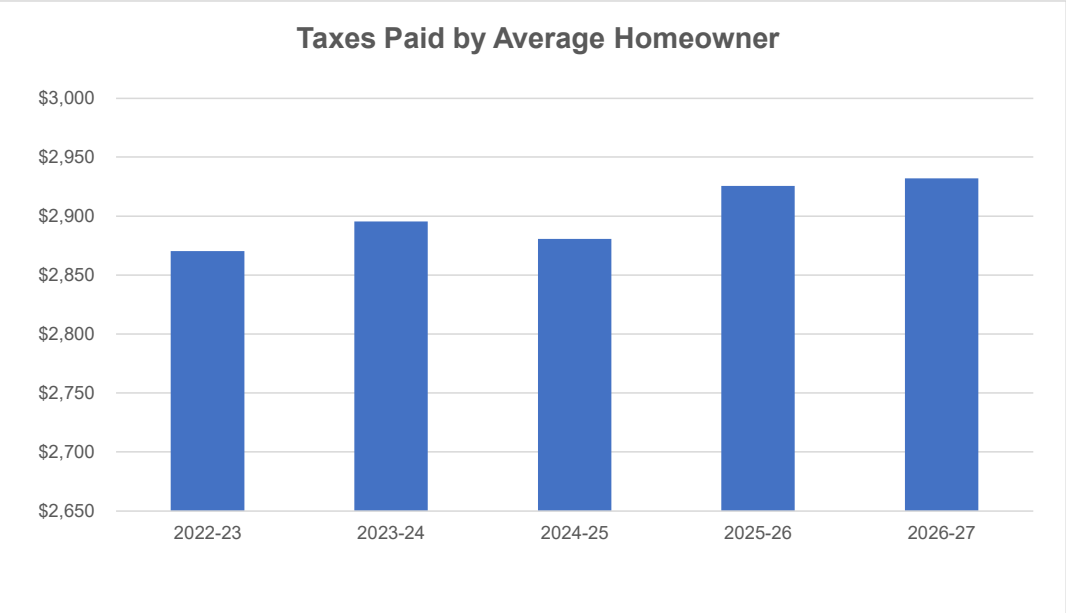
BUDGET'S EFFECT ON AVERAGE HOMEOWNER

	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected[1]
Tax Rates					
Permanent Tax Rate per $1,000 of AV	$ 4.7743	$ 4.7743	$ 4.7743	$ 4.7743	$ 4.7743
Local Option Tax	1.9900	1.9900	1.9900	1.9900	1.9900
Gap Tax Rate per $1,000 of AV	0.5038	0.5038	0.5038	0.5038	0.5038
Bond Tax Rate per $1,000 of AV	2.3000	2.3828	2.3338	2.4835	2.5046
Total Tax Rate	$ 9.5681	$ 9.6509	$ 9.6019	$ 9.7516	$ 9.7727
Average Assessed Value	$ 300,000	$ 300,000	300,000	300,000	300,000
Tax Burden	$ 2,870	$ 2,895	$ 2,881	$ 2,925	$ 2,932

[1] Actual levy rate determined by county assessors' offices

Measure 5, which introduced property tax rate limits, was passed in 1990 and became effective starting in the 1991-92 tax year. When fully implemented in 1995-96, Measure 5 cut property tax rates an average of 51 percent from their 1990-91 levels.

Measure 50 was passed in 1997 and cut property taxes, introduced assessed value growth limits and replaced most tax levies with permanent tax rates. Permanent tax rate equals the maximum rate without voter approval. Measure 50 cut effective tax rates an average of 11 percent from their 1996-97 levels.



Measure 5 Limits

$5 per $1,000 of Real Market Value (RMV)
$10 per $1,000 of RMV for general government taxes
Applied only to operating taxes, not bonds
For each property, school taxes and general government taxes compared to their limits respectively

Measure 50 Limits

Assessed Value (AV) for 1997-98 was set at 90% of 1995-96 AV for each property and permanent rates were established for taxing districts

For existing property, annual growth of AV limited to 3%
For new property, AV = RMV multiplied by AV/RMV of similar property

PRINCIPAL PROPERTY TAXPAYERS IN DISTRICT BOUNDARIES

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Principal Property Tax Payers for Multnomah County
Prior Year and Nine Years Ago
Taxing District - 311 Portland Public School District
(dollars in thousands)

	2024 [1]			2015		
Taxpayers with Ten Highest Taxable Assessed Values	Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value	Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value
Pacifcorp (PP&L)	$ 718,237	1	1.04 %	$ 299,787	1	0.69 %
Portland General Electric Co	535,158	2	0.78	254,208	3	0.58
Weston Investment Co LLC	313,915	3	0.45	231,629	4	0.53
Port of Portland	279,848	4	0.41	213,083	6	0.49
Comcast Corporation	234,428	5	0.34	257,204	2	0.59
Fred Meyer Sores Inc	195,763	6	0.28	-	-	-
111 SW 5th Avenue Investors LLC	195,184	7	0.28	155,136	10	0.36
Daimler Trucks North America	181,460	8	0.26	-	-	-
Schnitzer Steel Industries LLC	162,014	9	0.23	-	-	-
AAT Lloyd District LLC	160,791	10	0.23	-	-	-
Evraz Inc NA	-	-	-	218,465	5	0.50
AT&T Inc	-	-	-	170,140	8	0.39
Capref Lloyd Center LLC	-	-	-	173,304	7	0.40
CenturyLink	-	-	-	167,056	9	0.38
Subtotal of Ten Largest Taxpayers	2,976,798		4.30	2,140,012		4.91
All Other Taxpayers	66,029,778		95.70	41,496,776		95.09
Total All Taxpayers	$ 69,006,576		100.00 %	$ 43,636,788		100.00 %

Notes
[1] 2025 information not available at time of distribution

Sources
Multnomah County, Division of Assessment and Taxation

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year.

Portland Public Schools 2024-25 Annual Comprehensive Financial Report

DEMOGRAPHIC DATA

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Demographic and Economic Statistics
Last Ten Calendar Years
Multnomah County

Year	Population	Personal Income (thousands of dollars)	Per Capita Personal Income (dollars)	Unemployment Rate[2]
2025	-[1]	$ -[1]	$ -[1]	4.9%
2024	-[1]	-[1]	-[1]	3.7
2023	789,698	59,837,123	75,772	3.6
2022	795,083	55,618,917	69,954	3.9
2021	815,871	56,502,646	70,331	5.6
2020	815,637	52,080,033	63,852	11.6
2019	812,855	49,399,774	60,773	4.0
2018	811,880	46,966,887	57,850	4.0
2017	807,555	43,873,915	54,329	4.1
2016	801,539	41,735,341	52,069	4.9

Notes

[1] Data for 2024 and 2025 not available at time of printing.

[2] Oregon unemployment rates as of June 30 each year.

Sources As of July 2024, not seasonally adjusted.

US Department of Commerce, Bureau of Economic Analysis: population, personal income and per capita information.

Portland Business Journal, Book of Lists, published December 2015 and December 2024

Portland Public Schools 2024-25 Annual Comprehensive Financial Report

DEBT SERVICE OVERVIEW

Pension Bonds

In October 2002 Portland Public Schools participated as one of forty-one Oregon school districts and education service districts in issuing limited tax pension bonds. The proceeds were used to finance a portion of the estimated unfunded actuarial liability of each participating school district with the Oregon Public Employees Retirement System ("PERS"). The Oregon School Boards Association ("OSBA") sponsored this pooled limited tax pension bond program. The OSBA does not have a financial obligation in connection with the bonds issued under the program. Except for the payment of its pension bond payments and additional charges when due, each participating school district has no obligation or liability to any other participating school district's pension bonds or liabilities to PERS. In April 2003, OSBA sponsored another pooled limited tax pension bond program with thirty school districts and education service districts. Payments of yearly principal and interest are recorded as financial statement expenditures in instruction and in support services.

On October 31, 2002, the District issued $210.1 million Limited Tax Pension Bonds, Series 2002 (Federally Taxable), of which $53.5 million are Series 2002A (deferred interest bonds) and $156.6 million are Series 2002B (current interest bonds). The Series 2002A Bonds were paid off June 30, 2020. The 2002B Bonds are payable annually through June 2028. During 2012, $14.2 million of Series 2002 Pension Bonds were refinanced. The Series 2012 Refunding was paid off June 30, 2021.

On April 30, 2003, the District issued $281.2 million Limited Tax Pension Bonds, Series 2003 (Federally Taxable), of which $124.8 million are Series 2003A (deferred interest bonds) and $156.4 million are Series 2003B (current interest bonds). The Series 2003 Limited Tax Pension Bonds are payable annually through June 2028.

On July 15, 2021 the District issued $399.4 million Full Faith and Credit Pension Bonds, Series 2021 (Federally Taxable). The Series 2021 Full Faith and Credit Bonds are payable annually through June 2040.

The District anticipates the total costs of financing the District's UAL with Limited Tax and Full Faith and Credit Pension Bonds will result in a significant savings to the District when compared to paying for such costs as additional contribution rates to PERS.

General Obligation Bonds

As part of a $482.0 million capital bond measure passed by District voters in 2012, the District issued the following General Obligation debt to finance school renovation and replacement:

On May 1, 2013, the District issued $68.6 million in General Obligation Bonds, Series 2013B. The bonds mature on June 15, 2033 with principal payments due annually on June 15. On December 30, 2020 $50.4 million of Series 2013B General Obligation Bonds were refinanced through an advance refunding.

On April 30, 2015, the District issued $244.7 million in General Obligation Bonds, Series 2015B. The bonds mature on June 15, 2033 with principal payments due annually on June 15.

On August 10, 2017, the District issued $62.2 million in General Obligation Bonds, Series 2017B. The bonds mature on June 15, 2030, with principal payments due annually on June 15.

As part of a $790.0 million capital bond measure passed by District voters in 2017, the District has issued the following General Obligation debt to finance school renovation and replacement:

On August 10, 2017, the District issued $179.7 million in General Obligation Bonds, Series 2017B. The bonds mature on June 15, 2044 with principal payments due annually on June 15.

On April 14, 2020, the District issued $441.3 million in General Obligation Bonds, Series 2020. The bonds mature on June 15, 2037, with principal payments due annually on June 15.

On December 30, 2020, the District issued $54.0 million in General Obligation Advance Refunding Bonds, Series 2020C. The bond proceeds were used to redeem Series 2013B bonds. The bonds mature on June 15, 2033, with principal payments due annually on June 15. The Series 2020C Bonds maturing on or after June 15, 2031 are subject to optional early redemption. The total amount of interest savings (economic gain) as a result of the refinancing is $6.2 million. The present value of future cash savings as a result of the refinancing is $5.5 million.

As part of a $1.2 billion capital bond measure passed by District voters in November 2020, the District issued the following General Obligation debt to finance capital projects, including school renovation and replacement:

On December 30, 2020, the District issued $365.5 million in General Obligation Bonds, Series 2020B. The bonds mature on June 15, 2046, with principal payments due annually on June 15.

On April 27, 2023, the District issued $420.0 million in General Obligation Bonds, Series 2023. The bonds mature on June 15, 2049, with principal payments due annually on June 15.

On May 21, 2025, the District sold $79.5 million in bonds to raise capital to continue work under the 2020 Ballot Title Authorization.

On February 24, 2026, the District sold an additional $90.0 million in bonds under the 2020 authorization.

As part of a $1.83 billion capital bond measure passed by District voters in May 2025, the District issued the following General Obligation debt to finance capital projects, including school renovation and replacement:

On February 24, 2026, $570.0 million was issued under the 2025 renewal authorization approval by voters to continue modernization and construction of facilities.

Article XI-K of the Oregon Constitution allows the state to guarantee the general obligation bonded indebtedness of school districts. For the Series 2013B, 2015B, 2017B, 2020, 2020B, and 2020C General Obligation Bonds mentioned immediately above, the District participated in the Oregon School Bond Guaranty program (ORS 328.321 to 328.356), whereby the State of Oregon (State) guarantees all principal and interest payments until maturity will be made to bondholders when due. Should the District fail to make a payment of debt service on these bonds when due, the State will make the payment on behalf of the District, and then will seek recovery from the District. The State may recover funds by means of intercepting any source of operating monies normally remitted from the State to the District. Since the inception of the bonds, the District has not used the guarantee.

Other Debt

On November 9, 2016, the District issued $5.0 million in Full Faith and Credit Obligations, Series 2016. The obligations mature on December 1, 2031. The obligations carry a prepayment option such that any or all outstanding maturities may be redeemed on or after December 1, 2018.

On August 4, 2016 the District issued $4.0 million in Qualified Zone Academy (QZAB) Bonds, Series 2016. The District pays no interest over the 20 year term of the bonds. The bonds carry a 4.39 percent interest rate for structuring purposes, but the purchaser of the bonds receives a Federal tax credit in lieu of interest earnings. The bonds mature on August 4, 2036.

Legal Debt Limit

ORS 328.245 establishes a parameter of bonded indebtedness for school districts. Aggregates are governed by real market values within the District based on the following:

For each grade from kindergarten to eighth for which the District operates schools, fifty-five one-hundredths of one percent (.0055) of the real market valueFor each grade from ninth to twelfth for which the District operates schools, seventy-five one-hundredths of one percent (.0075) of the real market value

Ten years of Legal Debt Margin information from the District's 2024-25 Annual Comprehensive Financial Report is included on the following page.

LEGAL DEBT LIMIT

SCHOOL DISTRICT NO.1J, MULTNOMAH COUNTY, OREGON
Legal Debt Margin Information
Last Ten Fiscal Years
(dollars in thousands)

Legal Debt Margin Calculation for Fiscal Year 2025

Real Market Value	$ 151,420,136
Debt Limit (7.95% of Real Market Value) [1]	$ 12,037,901
Amount of Debt Applicable to Debt Limit:	
General Obligation Bonded Debt	1,304,876
Less: Amount Available in Debt Service Funds	(5,930)
Amount of Debt Applicable to Debt Limit	1,298,946
Legal Debt Margin	$ 10,738,955

	Debt Limit	Total net debt applicable to limit	Legal debt margin	Total net debt applicable to the limit as a percentage of debt limit
2025	$ 12,037,901	$ 1,298,946	$ 10,738,955	10.79%
2024	12,455,098	1,346,486	11,108,612	10.81
2023	12,487,714	1,464,030	11,023,684	11.72
2022	11,707,470	1,117,665	10,589,805	9.55
2021	11,149,825	1,220,405	9,929,420	10.95
2020	10,698,745	924,888	9,773,857	8.64
2019	10,472,898	526,062	9,946,836	5.02
2018	9,670,978	633,588	9,037,390	6.55
2017	8,501,342	309,076	8,192,266	3.64
2016	7,228,979	346,748	6,882,231	4.80

Allowable Percentage of Real Market Value:	
[A] Kindergarten through eighth grade, 9 x .0055	4.95%
[B] Ninth through twelfth, 4 x .0075	3.00%
Allowable Percentage	7.95% [1]

Notes

[1] ORS 328.245 establishes a parameter of bonded indebtedness for school districts. Aggregates are governed by real market values within the District based on the following:

[A] For each grade from kindergarten to eighth for which the District operates schools, fifty-five one-hundredths of one percent (.0055) of the real market value.

[B] For each grade from ninth to twelfth for which the District operates schools, seventy-five one-hundredths of one percent (.0075) of the real market value.

Sources

Tax Supervising and Conservation Commission Annual Reports for the relevant fiscal year

Portland Public Schools 2024-25 Annual Comprehensive Financial Report

BONDED AND OTHER DEBT
(in thousands)

Issue Date	Series	Original Issue	Outstanding @ June 30, 2026	2026-27 Principal Payments	2026-27 Interest Payments	2026-27 Total Payments
General Obligation Bonds						
April 30, 2015	GO Series 2015B	244,700	81,035	9,165	3,027	**12,192**
August 10, 2017	GO Series 2017B	241,890	163,095	3,780	5,363	**9,143**
April 14, 2020	GO Series 2020	441,320	196,620	29,010	8,392	**37,402**
December 30, 2020	GO Series 2020B	365,465	267,255	-	6,918	**6,918**
December 30, 2020	GO Series 2020C	53,965	38,715	4,780	560	**5,340**
April 27, 2023	GO Series 2023	420,000	286,000	13,955	13,249	**27,204**
February 24, 2026	GO Series 2026	660,000	660,000	40,695	42,299	**82,994**
Limited Tax Pension Obligation Bonds						
October 31, 2002	2002B	156,580	40,900	27,910	2,270	**30,180**
April 21, 2003	2003B	156,370	59,940	39,670	3,405	**43,075**
July 15, 2021	2021	399,390	332,735	16,360	7,143	**23,503**
Full Faith & Credit Obligations						
August 4, 2016	2016 Qualified Zone	4,000	2,200	200	-	**200**
November 9, 2016	2016 FF&C Taxable	5,048	2,293	355	63	**418**
	Total	**3,148,728**	**2,130,788**	**185,880**	**92,689**	**278,569**

LONG TERM DEBT
(in thousands)

Fiscal Year	LTD Tax Pension & Refunding	2016 Qualified Zone Bonds	FF&C Taxable Debt 2016	2015 GO Bonds	2017 GO Bonds	2020 GO Bonds	2020B GO Bonds	2020C GO Bonds	GO Series 2023	GO Series 2026	TOTAL
Principal:											
FYE 2027	83,940	200	355	9,165	3,780	29,010	-	4,780	13,955	40,695	**185,880**
FYE 2028	50,670	200	365	9,805	4,285	31,540	590	5,035	15,090	53,375	**170,955**
FYE 2029	18,495	200	375	10,675	4,780	34,190	850	5,300	16,665	-	**91,530**
FYE 2030	19,660	200	390	11,600	5,310	9,145	8,105	5,525	11,370	10,885	**82,190**
FYE 2031-2035	118,685	1,000	808	39,790	35,615	60,880	54,300	18,075	61,770	44,615	**435,538**
FYE 2036-2040	142,125	400	-	-	52,670	31,855	77,205	-	62,075	80,935	**447,265**
FYE 2041-2045	-	-	-	-	56,655	-	102,375	-	30,785	79,060	**268,875**
FYE 2046-2050	-	-	-	-	-	-	23,830	-	74,290	184,755	**282,875**
FYE 2051-2055	-	-	-	-	-	-	-	-	-	165,680	**165,680**
Principal Total	**433,575**	**2,200**	**2,293**	**81,035**	**163,095**	**196,620**	**267,255**	**38,715**	**286,000**	**660,000**	**2,130,788**
Interest:											
FYE 2027	12,818	-	63	3,027	5,363	8,392	6,918	560	13,249	42,299	**92,689**
FYE 2028	8,811	-	52	2,752	5,174	6,942	6,918	464	12,552	30,296	**73,961**
FYE 2029	6,686	-	41	2,262	5,045	5,365	6,888	364	11,797	27,627	**66,076**
FYE 2030	12,418	-	30	4,362	22,319	13,518	30,278	816	48,523	27,627	**159,891**
FYE 2031-2035	22,792	-	24	-	16,354	2,842	20,785	-	33,453	128,565	**224,815**
FYE 2036-2040	6,498	-	-	-	7,323	-	11,198	-	19,911	119,351	**164,281**
FYE 2041-2045	-	-	-	-	-	-	1,466	-	12,662	95,253	**109,382**
FYE 2046-2050	-	-	-	-	-	-	-	-	-	66,882	**66,882**
FYE 2051-2055	-	-	-	-	-	-	-	-	-	24,510	**24,510**
Interest Total	**70,023**	**-**	**211**	**12,402**	**61,578**	**37,059**	**84,451**	**2,204**	**152,148**	**562,409**	**982,486**
Total Debt Service	**503,598**	**2,200**	**2,504**	**93,437**	**224,673**	**233,679**	**351,706**	**40,919**	**438,148**	**1,222,409**	**3,113,274**

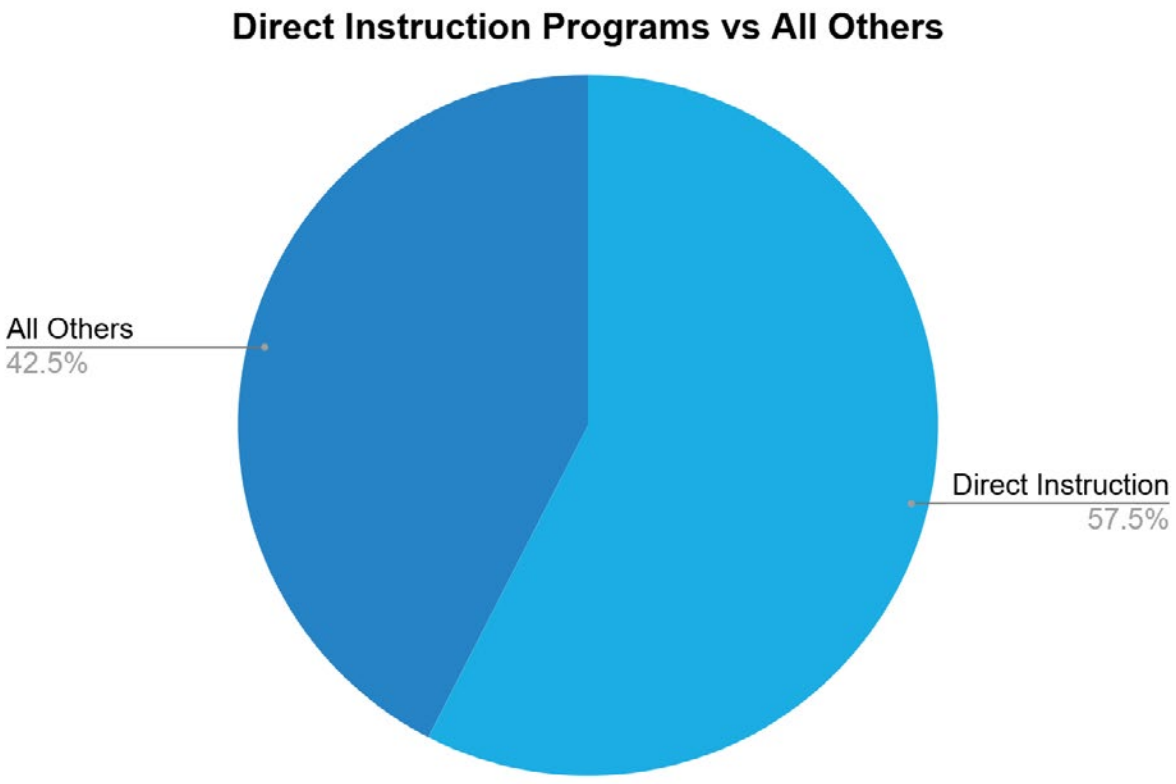
Payments by Debt Service Fund, 2026-27

Fiscal Year	LTD Tax Pension & Refunding	2016 Qualified Zone Bonds	FF&C Taxable Debt 2016	2015 GO Bonds	2017 GO Bonds	2020 GO Bonds	2020B GO Bonds	2020C GO Bonds	GO Series 2023	GO Series 2026	TOTAL
Fund 308	96,758	-	-	-	-	-	-	-	-	-	**96,758**
Fund 322	-	200	-	-	-	-	-	-	-	-	**200**
Fund 323	-	-	418	-	-	-	-	-	-	-	**418**
Fund 350	-	-	-	12,192	9,143	37,402	6,918	5,340	27,204	82,994	**181,193**
Total	**96,758**	**200**	**418**	**12,192**	**9,143**	**37,402**	**6,918**	**5,340**	**27,204**	**82,994**	**278,569**

PERSONNEL RESOURCE ALLOCATIONS

The charts on the following pages depict staffing allocations from four previous years, as well as this year's budget. These allocations are broken out by their function type. Descriptions of the type of activity being carried out can be found below. Staff are further broken down by employee type. Direct Instruction refers to any activity dealing directly with the teaching of 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. All Others refers to support services - services which provide administrative, technical, personal (such as guidance and health), and logistical support to facilitate and enhance instruction; community services, such as nutrition services; and all other areas in which the district provides direct personnel resources, such as construction management.

For 2026-27, staffing allocations are preliminary and should not be considered final. Assignments to the various programs can and will change as the District progresses through the various phases of budget development, spring staffing, and fall program balancing. Final staffing allocations are not completed until after the beginning of the school year. For previous budget years, these allocations are drawn from the final budgets.

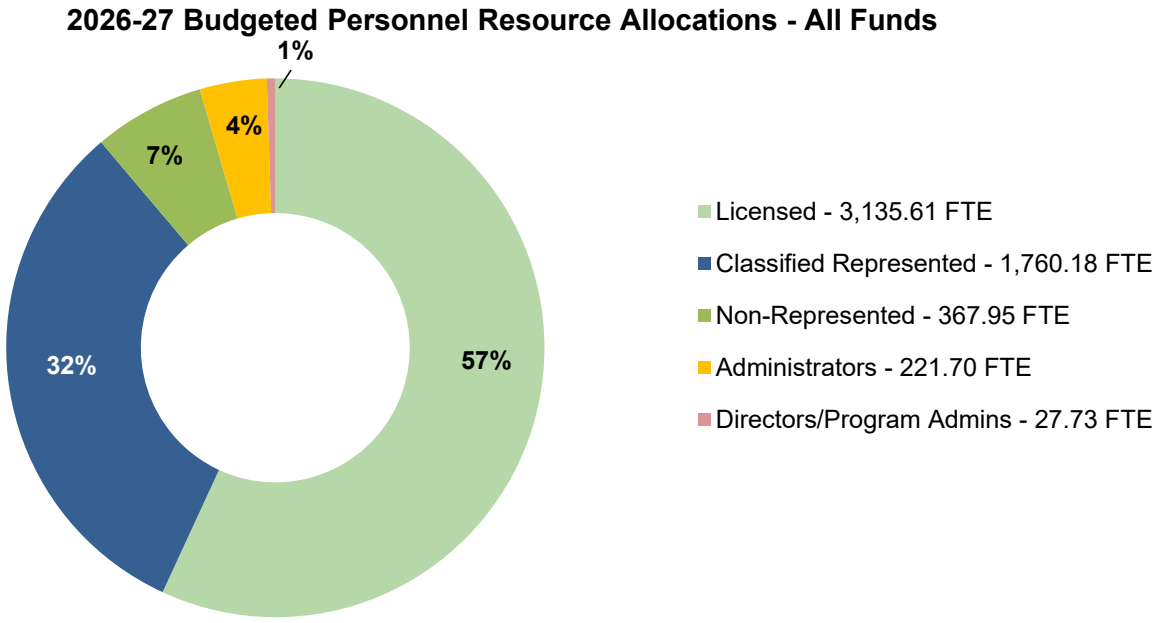


FTE BY MAJOR FUNCTION AND EMPLOYEE TYPE

Licensed Staff	Teachers, Licensed Support Personnel, Counselors, and TOSAs (Teachers on Special Assignment)
Classified - Represented	Educational Assistants, Secretarial, Clerical, Maintenance, and Transportation
Non-Represented Staff	Professional Central Office and School-Based Staff
Administrators - Licensed	Superintendent, Academic Administrators and Directors, Principals and APs/VPs
Administrators - NonLicensed	Operational and Business Administrators
Directors/Program Admins	Operational, Business Directors, and Supervisors

	Actuals 2022-23	Actuals 2023-24	Adopted 2024-25	Adopted 2025-26	Proposed 2026-27
11 - Regular Programs: Primary instructional activities					
Licensed Staff	2,434.92	2,226.00	2,134.40	2,026.55	1,953.30
Classified - Represented	221.03	201.94	164.73	135.74	150.28
Non-Represented Staff	3.80	5.00	4.40	2.40	0.40
Administrators - Licensed	7.50	8.00	6.00	2.00	-
Subtotal	**2,667.25**	**2,440.94**	**2,309.53**	**2,166.69**	**2,103.98**
12 - Special Programs: Instructional activities for students with special needs					
Licensed Staff	525.26	499.72	551.33	568.70	549.82
Classified - Represented	509.48	508.23	508.87	525.39	513.98
Non-Represented Staff	5.06	1.00	1.00	-	-
Subtotal	**1,039.80**	**1,008.95**	**1,061.20**	**1,094.09**	**1,063.80**
14 - Summer School Programs					
Classified - Represented	-	-	-	-	4.34
Subtotal	**0.00**	**0.00**	**0.00**	**0.00**	**4.34**
21 - Support Services—Students: Activities to assess and improve the well-being of students					
Licensed Staff	518.98	497.38	488.05	483.59	476.38
Classified - Represented	158.31	173.00	164.18	158.32	147.94
Non-Represented Staff	49.43	53.24	65.30	55.80	49.20
Administrators - Licensed	48.00	58.01	59.00	54.00	30.30
Directors/Program Admins	4.00	4.00	4.00	5.00	3.00
Subtotal	**778.72**	**785.63**	**780.53**	**756.71**	**706.82**
22 - Support Services—Instructional Staff: Assistance and support for instructional staff					
Licensed Staff	263.37	265.41	234.80	194.43	156.11
Classified - Represented	48.80	43.33	17.49	13.75	11.37
Non-Represented Staff	24.63	21.75	22.75	20.75	15.75
Administrators - Licensed	10.50	13.50	10.00	9.00	12.00
Directors/Program Admins	1.00	1.00	1.00	1.00	2.00
Subtotal	**348.30**	**344.99**	**286.04**	**238.93**	**197.23**
23 - Support Services—General Administration: Administration of policy and operations of the district					
Non-Represented Staff	26.00	27.00	20.00	19.75	23.00
Administrators - Licensed	13.00	15.00	13.00	13.00	3.00
Administrators - Non Licensed	3.00	3.00	3.00	3.00	4.00
Directors/Program Admins	8.00	8.00	4.00	4.00	2.00
Subtotal	**50.00**	**53.00**	**40.00**	**39.75**	**32.00**
24 - School Administration: School direction and supervision					
Licensed Staff	3.58	0.50	-	-	-
Classified - Represented	205.59	198.78	194.18	198.13	189.03
Non-Represented Staff	54.79	79.88	60.38	54.23	44.98
Administrators - Licensed	180.75	171.25	170.15	162.65	162.40
Directors/Program Admins	-	-	1.00	1.00	1.00
Subtotal	**444.71**	**450.41**	**425.71**	**416.01**	**397.41**

	Actuals 2022-23	Actuals 2023-24	Adopted 2024-25	Adopted 2025-26	Proposed 2026-27
25 - Support Services—Business: Fiscal, operational, and internal services					
Classified - Represented	571.50	559.25	531.40	549.35	518.10
Non-Represented Staff	115.30	118.30	113.30	111.80	87.25
Administrators - Non Licensed	2.00	2.00	2.00	2.00	3.00
Directors/Program Admins	13.00	12.00	12.00	13.00	9.98
Subtotal	**701.80**	**691.55**	**658.70**	**676.15**	**618.33**
26 - Support Services—Central: Activities other than general admin, which support instructional and supporting programs					
Licensed Staff	15.00	9.00	2.00	-	-
Classified - Represented	26.50	23.00	23.38	23.38	17.00
Non-Represented Staff	135.83	139.00	135.75	128.00	109.13
Administrators - Licensed	3.00	7.50	5.50	5.00	-
Administrators - Non Licensed	3.00	3.00	3.00	3.00	4.00
Directors/Program Admins	16.50	12.50	13.00	8.00	8.00
Subtotal	**199.83**	**194.00**	**182.63**	**167.38**	**138.13**
31 - Food Services: Providing food to students					
Classified - Represented	173.51	172.59	168.75	176.78	174.91
Non-Represented Staff	14.40	15.01	16.00	14.00	12.00
Directors/Program Admins	2.00	2.00	2.00	2.00	1.00
Subtotal	**189.91**	**189.60**	**186.75**	**192.78**	**187.91**
33 - Community Services: Activities which are not directly related to educating students					
Classified - Represented	44.04	42.91	42.63	38.75	33.25
Non-Represented Staff	6.50	8.00	1.00	2.00	1.00
Administrators - Non Licensed	-	1.00	-	-	-
Subtotal	**50.54**	**51.91**	**43.63**	**40.75**	**34.25**
41 - Facilities Acquisition and Construction: Acquisition of land and/or buildings and construction					
Classified - Represented	7.00	7.00	3.00	3.00	-
Non-Represented Staff	40.30	41.50	39.50	42.25	25.25
Administrators - Licensed	-	-	-	-	2.00
Administrators - Non Licensed	-	-	-	-	1.00
Directors/Program Admins	1.50	1.50	1.00	1.00	0.75
Subtotal	**48.80**	**50.00**	**43.50**	**46.25**	**29.00**
Grand Total	**6,519.66**	**6,260.98**	**6,018.22**	**5,835.46**	**5,513.16**



SCHOOL STAFFING

School staffing for 2026-27 was based on projected October 2026 enrollment, which primarily uses the actual October 2025 enrollment as the base, with adjustments made for population and housing changes and the grade progression rates at each school. The District's enrollment is declining and is expected to continue. However, enrollment is not declining at the rate experienced during the pandemic.

PPS's focus has been to maintain investments that have the biggest impact on student outcomes while supporting fiscal sustainability in the system. School leaders were given discretion with some allocations to support individual school needs.

School staffing changes have been applied at all school levels. All schools were given discretionary FTE with some requirements for use. Elementary and middle school (K-5, K-8, 6-8) discretionary FTE must be used to staff an Instructional Coach, Interventionist, School Climate Specialist, Social Worker, or Counselor. High school (9-12) discretionary FTE replaces the prior Admin Support table and there is a minimum for class size in grades 6-12 of 15, noting exceptions may be considered. **All changes for the new year are noted in bold** in each section of the allocations.

The information below provides the details associated with staffing allocations to the schools, including the General Fund, Arts Tax, and the Student Investment Account (SIA), with notation of where allocations are differentiated based on school designations. There are additional allocations via grants, which are noted at the end, as they cover many positions in schools.

K-5, K-8, and Middle School Formulas

K-5 Class Sizes

The number of teachers needed are identified for grades K-5 by sections of students. A section is a group of students that are participating in a specific program. For instance, a section could be a group enrolled in a traditional neighborhood program or a group enrolled in a language immersion program. When assigning teachers based on sections, schools are able to ensure that there are enough teachers to teach at each grade for each section.

Program balancing will occur in the spring and fall to address unexpected enrollment. Exceptions to the target class size may occur where a school facility does not have space for an additional section, or if there are programmatic reasons for a slightly larger class size (as in an immersion program).

Very few classes are expected to be at the maximum target class size.

Homerooms are allocated based on the below class size maximums and result in the following class size ranges. **The only change for 2026-27 is the addition of 1/2 blends**. School leaders have the discretion to blend one class in the blended grades or the whole grade band.

	Title I Schools		Other Schools	
Grade	**Target Class Size**	**Typical Class Size Ranges**	**Target Class Size**	**Typical Class Size Ranges**
KG	28	15-28	29	15-29
1	30	16-30	31	16-31
1/2	26	13-26	26	13-26
2	30	16-30	32	17-32
3	30	16-30	33	17-33
4	33	17-33	34	18-34
4/5	28	15-28	28	15-28
5	33	17-33	34	18-34

K-5 and K-8 Arts, Physical Education, Library

All K–5 schools and K–5 grades in K–8 schools receive Library, PE, and VAPA allocations to meet core instructional minutes and elementary planning requirements. Each K–5 homeroom is scheduled for 90 minutes per week of PE, and 45 minutes of Library, Music, and Visual Arts. Allocations are calculated in 0.2 FTE increments based on the number of K–5 homerooms and rounded up to the nearest 0.2. Music, Visual Arts, and PE teachers are allocated to teach six K–5 homerooms per day, while Teacher-Librarians teach five and in some cases six.

K-8 Arts Pathway Schools are allocated additional FTE to ensure all grades 6-8 are offered Art.

K-5 Arts (more details)

The City of Portland, through the Arts Access Fund tax, provides funding for arts educators in K-5 schools at a 500:1 student-to-educator ratio. This funding must be used to hire licensed arts educators in dance, music, theatre, or visual arts.

Additionally, K-5 Arts Pathway Schools, as designated by the district's Master Arts Education Plan, receive additional Arts FTE to ensure that every K-5 homeroom has access to both music and visual arts. These schools must provide students with at least 45 minutes of instruction per week in both music and visual arts for the entire school year, totaling a minimum of 1.5 hours combined (45 minutes per subject).

Beyond the Arts Tax funding, schools continue to receive additional arts FTE allocations. Schools also have the flexibility to use other funding sources, such as Equity and Title funds, to support additional arts positions beyond the central office allocations.

K-5 School-Wide Support

The School-Wide Support table (shown below) indicate the number and types of positions allocated to each school for administrative and other basic supports. The allocations are based on the school size and configuration. FTE is shown in Licensed Equivalents, with Administrative Assistant positions represented as half a certified FTE.

FTE Allocated by School Enrollment	<300	300-349	350-399	400-499	500-549	550-599	600-699	700-799
Principal	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Assistant Principal					**1.00 (Title I)**	1.00	1.00	1.00
Administrative Assistant	0.75	0.75	0.75	0.75	0.75	0.75	1.00	1.00
Discretionary Support*	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
K-5 School Total	2.75	2.75	2.75	2.75	2.75	3.75	4.00	4.00

K-8 School-Wide Support

The School-Wide Support table (shown below) indicate the number and types of positions allocated to each school for administrative and other basic supports. The allocations are based on the school size and configuration. FTE is shown in Licensed Equivalents, with Administrative Assistant positions represented as half a certified FTE.

FTE Allocated by School Enrollment	<250	250-299	300-399	400-499	500-599	600-699	700-799
Principal	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Assistant Principal				1.00	1.00	1.00	1.00
Administrative Assistant	0.75	0.75	0.75	0.75	0.75	1.00	1.00
Discretionary Support*	1.00	1.00	1.00	1.00	1.00	1.00	1.00
K-8 School Total	2.75	2.75	2.75	3.75	3.75	4.00	4.00

Middle School School-Wide Support

The School-Wide Support table (shown below) indicate the number and types of positions allocated to each school for administrative and other basic supports. The allocations are based on the school size and configuration. FTE is shown in Licensed Equivalents, with Administrative Assistant positions represented as half a certified FTE.

FTE Allocated bySchool Enrollment	**All MS**
Principal	**1.00**
Assistant Principal	**1.00**
Administrative Assistant	**0.75**
Teacher-Librarian	**0.50**
Middle School Total	**3.25**

Note: Campus Safety Associates are provided centrally and supervised through the Security Services department.

K-5, K-8, and Middle School Targeted Support

*Discretionary FTE may be used for Instructional Coaches, Interventionists, School Climate Specialists, Counselors, or Social Workers. Social worker allocations continue where currently assigned (grant and general fund match). Interventionist FTE is allocated in 0.5 increments based on student need.

Kindergarten EAs are provided to Title I schools with 40% or more direct certification students and KG class sizes of 20 or more.

K-5, K-8, and Middle School Equity

In an effort to align with our Equity lens across the District, additional resources are allocated to schools in need through Equity Funding. Equity allocations equal 4% of total K–8 teacher FTE, split evenly between Socio-Economic Status and Federally Qualified Status (Socio-Economic Status, ELL and Special Education), and rounded to the nearest 0.5 FTE.

- Socio-Economic Status FTE is allocated to schools with over 20% of students who are eligible for free meals by direct certification.
    - Direct Certification is a proxy measure to determine economic disadvantage. Students eligible to receive free meals by Direct Certification are students who are eligible for free meals, as identified by the state. Students or families qualify for Direct Certification through a number of avenues such as eligibility for Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF), Migrant Ed, McKinney Vento, foster care or Medicaid.

- Federally Qualified Underserved FTE is allocated to schools with over 40% of students who meet one of the following criteria: Special Education Eligibility, Limited English Proficiency, or Free meal eligibility by direct certification.

K-5 and K-8 and Middle School Counselors
Counselors are allocated using a ratio of **350:1**, based on the total school enrollment and the allocations are rounded to the nearest 0.2.

Grades 6-8 Teacher Staffing in K-8 and Middle Schools
All K-8s and middle schools will continue to utilize a 5 of 7 schedule and have been allocated FTE to accommodate the 7 period day. **There is a minimum for class size in 6-8 of 15, exceptions may be considered. 6-8 in K-8 is staffed by section, whereas middle schools are staffed via a ration and base**. Each 6-8 school is allocated PE teachers to ensure each student can have 3 quarters of PE per year with a PE Teacher. The 6-8 PE allocation is included as part of the total 6-8 teacher allocation.

Middle School Teacher Staffing

	Title I	Non-Title
Ratio	**23.5:1**	**23.5:1**
Base	1.0 FTE	0.0 FTE

9-12 Formulas

Grades 9-12 Teacher Staffing
High schools are staffed based on a ratio and base which differs based on total enrollment. **There is a minimum for class size in 9-12 of 15, exceptions may be considered.**

Small Schools <800	Ratio	**25:1**
	Base	**4 FTE**
Large Schools >1,000	Ratio	**25:1**
	Base	**1 FTE**

High School Counselors
Counselors are allocated using a ratio of 350:1, based on the total school enrollment. The allocations are rounded to the nearest 0.5.

High School School-Wide Support
The School-Wide Support table (shown below) indicate the number and types of positions allocated to each school for administrative and other basic supports. The allocations are based on the school size and configuration. FTE is shown in Licensed Equivalents, with Administrative Assistant positions represented as half a certified FTE.

FTE Allocated by School Enrollment	1-99	100-600	600-699	700-1199	1200-1399	1400-1599	1600+
Principal	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Vice Principal	**0**	1.00	1.00	2.00	2.00	**2.00**	**3.00**
Athletic Director	**0**	1.00	1.00	1.00	1.00	1.00	1.00
Teacher-Librarian	**0**	1.00	1.00	1.00	1.00	1.00	1.00
Social Worker	**0**	1.00	1.00	1.00	1.00	1.00	1.00
High School Support	**0**	**1.50**	**2.00**	**2.00**	**2.25**	**2.50**	**2.50**
High School Support Positions = Bookkeeper (0.5), College/ Career Coordinator (0.75), Admin Assistants (0.5)							
High School Total	1.00	6.50	7.00	8.00	8.25	8.50	9.50

High School School-Wide Support Notes

- **Campus Safety Associates** report to Security Services and are not included in school-wide support tables or General Fund FTE.
- **Career Coordinators** are no longer funded through the General Fund. The role supports CTE alignment, industry partnerships, career learning, and Personalized Learning Requirements.
- **College Coordinators:** Schools may use High School Support allocation to continue funding this position. Schools may also use M98 funds for up to 1.0 FTE to support postsecondary readiness, especially for historically underserved students.
- **Student Attendance Coaches:** Schools may use M98 funds for 1.0 FTE to address chronic absenteeism.
- **Learning Acceleration Instructional Specialists (LAIS)**: M98 funds may support LAIS to expand access to advanced coursework.
- **Counselors and Social Workers** are allocated based on enrollment.

High School Success Fund (M98)

High School Success is a fund initiated by ballot Measure 98 in November 2016. Funding is provided to establish or expand programs in three specific areas: Dropout Prevention, Career & Technical Education (CTE), and College Level Education Opportunities.

- Ninth graders must be scheduled in cohort structures with Student Success Teams (SSTs) of at least three cross-disciplinary teachers.
- M98 funds a 1.0 FTE instructional specialist/coach, with at least 0.5 FTE serving as SST Lead.
- M98 supports SST collaboration time (90 minutes monthly and one half-day quarterly).
- Ninth grade scheduling is prioritized after Special Education and ELL, with aligned planning time for grade-level and Special Education teachers.
- Schools that do not meet SST requirements will not receive M98 funding.
- The **1.0 FTE instructional specialist/coach** supports SSTs and ongoing professional development focused on standards-based, culturally sustaining instruction and may be one person or split between two.

High School Equity (Socio-Economic Status FTE)

In an effort to align with our RESJ lens across the District, additional resources are allocated to schools through Equity Funding.

- All high schools receive equity allocations. The equity allocation is 9% of the total teachers allocated for high schools. The allocation is based on each school's number of students who are eligible for free meals by direct certification and the allocations are rounded to the nearest 0.5 increment.
    - Direct Certification is a proxy measure to determine economic disadvantage. Students eligible to receive free meals by Direct Certification are students who are eligible for free meals, as identified by the state. Students or families qualify for Direct Certification through a number of avenues such as eligibility for Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF), Migrant Ed, McKinney Vento, foster care, or Medicaid.

Additional Need-Based FTE

A formula cannot always reflect the special circumstances of a particular school. As a result, it is sometimes necessary to make additional allocations to account for unusual school requirements or schools in transitioning situations. Some examples are high schools going through significant transition due to capital improvement/bond planning, or schools with special program requirements.

Grant Funds and Special Revenue Funds

Many schools have grant and/or special revenue funds that provide for additional staff in the schools.

Title IA Allocations

The Federal Title IA grant funds provide additional FTE for both certified and classified staff in the schools. Most of the Title IA funds received by the District are allocated directly to elementary, middle, and K-8 schools where at least 33% of the students would qualify for free meals through Direct Certification. High Schools receive Title IA funding if they are identified as "High Poverty", which is equivalent to 46.9% of students who qualify for free meals through Direct Certification. The funds are targeted to support students from low income families. Dollars are allocated per qualifying student.

The formula example for grades K-8 is Total Allocation ÷ Total Low-Income Student Count = Base Per-Student Rate. The base per-student rate is then multiplied by 1.25 to comply with the 125% rule. PPS is obligated to adhere to this rule because PPS chooses to fund schools with a poverty rate of 33%. The threshold established under the Elementary and Secondary Education Act (ESEA) is 35%. The adjusted per-student rate is multiplied by the number of eligible students at each school to determine the school's Title I school-based allocation.

Remaining Title IA funds are allocated centrally and most notably funds our McKinney-Vento Homeless supports. Title IA allocations to charter schools are calculated in exactly the same way as allocations to PPS schools. In compliance with federal requirements, private schools receive equitable support for the Title IA eligible students who attend the private schools that are located within the PPS boundaries.

Title I Interventionist Allocation

Title I funds were allocated using a rank-and-serve approach based on school-level poverty, consistent with Federal Title I guidance. Within each grade band, allocations were made in descending order of need, and no lower-ranked school received a greater allocation than a higher-ranked school, ensuring methodological integrity and equitable treatment among eligible schools.

Base allocations provided through SIA and Early Literacy grants were applied uniformly to eligible schools to ensure minimum intervention capacity, while supplemental allocations were driven by clearly defined, objective criteria tied to student need. Student-level eligibility for additional support was determined using Fall 2025 assessment data, including MAP Fluency for grades K–2 and MAP Growth for grades 3–5, with predetermined percentile thresholds to identify students requiring Tier 3 literacy intervention.

The methodology ensures that Title I funds supplement, rather than supplant, other funding sources. Additional SIA and Early Literacy allocations were used to address intensive literacy needs that exceeded the base intervention capacity supported through Title I, and non–Title I allocations were limited to grant-eligible funds only.

Title I Bridging Process

PPS developed a lower per-pupil rate of $603 for recently exited Title I schools. This rate was then applied to each school's eligible DC student count to calculate final school-level allocations. Although bridge schools are no longer designated as Title I, they are still required to use Title I Schoolwide Allocations and the Family Engagement set-aside in the same manner as Title I schools.

ESSA Partnership Funds for CSI and TSI Schools

Schools identified for CSI or TSI support will receive Federal School Improvement Funds to Support CSI and TSI Schools. CSI/TSI schools will be provided an individual school allocation calculated using ODE's methodology. Recipients are expected to use these funds to enhance school-level activities to support focal students and continuous improvement efforts informed by comprehensive data analysis and ongoing community engagement.

English Language Development Staffing

English Language Development (ELD) school-based funding and staffing is a supplemental allocation intended to support school ELD programs and services for multilingual learners (ML) who qualify for ELD services. ELD staffing allocations, for both classified and licensed staff, must be used to help students attain proficiency in English, which is critical to their overall academic success and required by federal and state laws. ELD FTE may only be used for ELD services and for ELD-classified students. All ML students are included in the general fund staffing formulas as 1.0, as ELD is supplemental staffing.

ELD licensed and classified FTE is allocated based on weighting students based on ELPA proficiency levels and qualification for ELD services. For example, PISA students are high school newcomers to the United States; Emerging students have lower levels of proficiency and require more support in comparison to a student who is identified as progressing. For the 2025-26 school year, a small formula correction was made by adding SIFE (Students with Interrupted or Inconsistent Formal Education) students to receive the highest weight along with PISA students to account for students with the highest need in all of our schools. Additional itinerant positions were added for 2026-27 to ensure students receive services where unexpected enrollment and ELD service needs arise when school begins. In addition, for 2026-27, the ranges changed for the ELD teacher and EA allocations, which are shown below.

School FTE allocations are based on the most current English Language Proficiency Assessment (ELPA) or the ELPA Screener scores, if no ELPA test has been taken, for each student.

The weighting provides FTE for ELD staff as well as additional FTE to support ELD students throughout the day.

Proficiency Level (Domains = Reading, Writing, Speaking, and Listening)	Weight for ELD Staffing Allocation Based on Need for ELD Services
SIFE at the Emerging Level and PISA Students	2.375
Emerging	1.5
No Test Taken	1.0
Progressing with a total sum of 4-8 from all assessed domains	1.25
Progressing with a total sum of 9-13 from all assessed domains	1.0
Progressing with a total sum of 14-15 from all assessed domains	0.5
Progressing with a total sum of 16-18 from all assessed domains	0.25

Licensed ELD staffing formula:
ELD Teacher staffing is based on the sum of the weighting of ML students and allocated as described in the table below:

ML Students (weighted)	Teacher Allocation
0-7	0 Students are served via an itinerant ELD teacher
8-14	0.25
15-30	0.5
31-60	1
61-90	1.5
91-120	2
121-150	2.5
151-180	3
181-210	3.5
211-240	4
241-272	4.5
273-305	5
306-347	5.5
348-370	6
371-402	6.5
403-435	7
436-467	7.5

Bilingual Educational Assistants
Bilingual Educational Assistant (EA) staffing is based on an ML student number with extra weighting of students with language proficiency levels (averaging an emergent and early progressing ELPA Summative proficiency level). Students in these levels need extra support and should receive EA support during core classes. EAs also provide invaluable support for linguistically diverse families. This allocation model is described in the table below:

MLs (weighted)	K-5, K-8, 6-8
0-99	0
100-199	0.438
200+	.875

MLs (weighted)	HS EA Allocation (0.875 FTE (35 hours) (considered full-time)
0-59	0
60-119	0.438
120-179	0.875
180-239	1.313
240-299	1.75
300-359	2.188
360-419	2.626
420-479	3.064
480-539	3.502

Special Education (SPED) Staffing

Special Education funding must only be used to provide special education, related and supplementary aids and services, specifically written into a student's individualized education plan (IEP), for students determined eligible for special education. Special Education resources are supplemental to the core and intervention instructional program and are not allocated to supplant the core instructional or intervention resources.

Special Education staff includes Learning Center teachers, Speech Pathologists, School Psychologists, Paraeducators, Physical Therapists, Occupational Therapists, and other specialists.

Allocations of teachers and assistants are made on the basis of the best information available at the time staffing is completed in the spring. Depending upon the resources available, these allocations may be adjusted based on updated enrollment information in the late Spring and at the beginning of the school year.

New for 2025-26 and continuing in 2026-27, schools implementing the Neighborhood Schools Model are assigned staff using the PPS Student Level of Need Matrix.

Learning Center Teachers (K-12)

All Learning Center teachers are allocated in 0.5 FTE increments. The learning center ratio for K-5, K-8, 6-8 and K-12 are as follows:

- K-8 Learning Center Formula: Every 14 eligible students = 0. 5 FTE
- High School Learning Center: Every 15 eligible students = 0.5 FTE and 1 paraeducator for HS CB Team

Focused Special Education Programs (K-12)

Staffing allocations for Specialized Education programs are as follows, with a student goal of 13 per classroom:

Program Type	Grade	Projected Students Threshold	Teacher FTE	Para-educators	Therapeutic Intervention Coach (TIC) FTE - Student Staffing Ratio	Mental Health Service Provider FTE - Student Staffing Ratio (Round to nearest .1 FTE)
Social Emotional Skills (SES)	K-5	13	1	3	0.039 Staffing Factor (13 Students is .5 FTE)	0.039 Staffing Factor (13 Students is .5 FTE)
	6-8	13	1	3	n/a	0.039 Staffing Factor (13 students is .5 FTE)
	HS	13	1	2	.077 Staffing Factor (13 Students is 1.0 FTE)	.077 Staffing Factor (13 Students is 1.0 FTE)
Communication Behavior (CB)	K-5	13	1	3		
Intensive Skills Centers (ISC)	K-12	13	1	3		

School Psychologists (K-12)

- School Psychologists' caseloads are determined by the ratio of School Psychologist FTE to students receiving special education services to the nearest .20 FTE as identified in the Collective Bargaining Agreement in Appendix J.
- A School Psychologist's schedule is divided into full days at each school they serve (a 0.2 FTE is equal to an 8-hour day).
- School Psychologist FTE are centrally led.
- Schools that are part of the School-Based Mental Health Grant are allocated School Psychologist FTE at a ratio of 1:500 students.
- School Psychologist assignments are determined on a 3-year rotation.
    - The 2026-27 school year is the first year of the rotation.

Grade-Level	Students Who Receive Special Education Services to School Psychologist Ratio
K-12	School Psychologists are allocated to PPS Schools at a ratio not to exceed 1:135 Students that receive special education Services
PPS Participates in the School Based Mental Health Grant Program that provides additional funds to support implementation at selected schools of the Comprehensive School Psychologist Program	Comprehensive School Psychologist Assignments 1:500 - Total enrollment

Speech and Language Pathologists (K-12)

- Speech and Language Pathologists are allocated based on the number of students receiving speech services.
- Allocations are rounded to the nearest 0.2 FTE to provide for full days at each school, reducing lost service due to time spent in travel between buildings.
- FTE are allocated to each building, but assigned/unassigned by the Special Education Department.
- Allocations are completed as identified in the Speech and Language Pathologist Memorandum of Understanding.

Grade-Level	Students to Speech and Language Pathologist Ratio
K-12	1:50

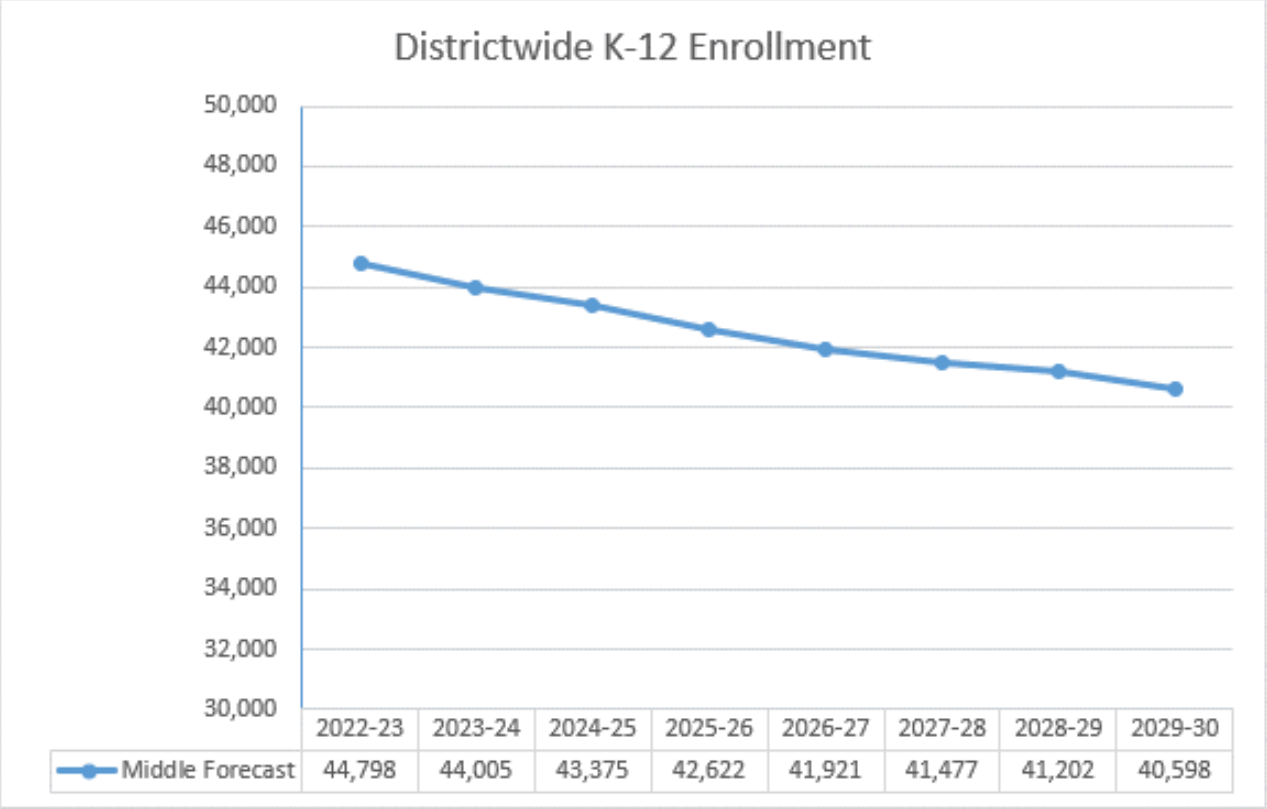
Designated Adult Support Paraeducators

- Designated paraeducators will be assigned to schools to meet the needs of a specific student as indicated by services on an Individual Education Plan (IEP).
- All designated support paraeducators for adult assistance in all grades K-12 will be allocated from an FTE pool managed by the central Special Education department.
- Designated supports are assigned to a student based on the need outlined within the IEP.
- These supports **are removed** when the support is no longer required for that student or the student no longer attends the school.
- IEPs are expected to have specific plans focused on developing independence and goals for removal of the designated adult support.

STUDENT ENROLLMENT HISTORY AND PROJECTED ENROLLMENT

School staffing for 2026-27 was based on projected October 2026 enrollment, which primarily uses the actual October 2025 enrollment as the base, with adjustments made for population and housing changes and the grade progression rates at each school. PPS has not recovered from the enrollment loss from the pandemic and the continued low birth rate in Portland, but is trying new strategies to get more students enrolled, including an enrollment campaign. The graph below shows the continued declining enrollment and future projections.

The process of projecting enrollment figures is also called "forecasting"; these figures have been computed by Portland State University's Population and Research Center (PRC). PRC has calculated district enrollment projections for PPS since 1999. Projections account for changes in school configuration (e.g., adding a grade, a new school or program, a program expansion, changes in transfer policy or boundaries, or changing demographic factors) and neighborhood changes (e.g., known future housing developments). PRC provides three different levels of district enrollment forecasts – low, middle and high. The middle forecast is used, and low and high forecasts show the potential variance.



	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Middle Forecast	44,798	44,005	43,375	42,622	41,921	41,477	41,202	40,598

PPS' enrollment projections by PRC are done at the district, cluster and school level. PRC uses a "grade progression model," also referred to as a "cohort survival method" to forecast enrollment at individual schools. Projected enrollment in any given school and grade is based on the previous year's grade at that school with adjustments for how students have progressed from grade to grade in the recent past. For example, next year's third grade enrollment at School A is based on the current number of second graders in School A and the percent of students matriculating from second grade to third grade at School A in the previous three years.

PRC also generates enrollment projections separately for the Neighborhood and co-located program for each grade in grades K-8. For example, School B has both a Neighborhood and Immersion program. The projections for each grade is broken out between the Neighborhood and Immersion program.

For the beginning grade level at a school (i.e., Kindergarten, 6th, and 9th grades), projections are based on the historic share of residents that attend the schools and on transfer trends. Kindergarten forecasts are informed by birth data collected by health agencies.

All school level forecasts are reconciled with the overall cluster and district projections. PRC projections are completed in December, and adjustments to the PRC forecast may be made later in the year when there are school consolidations, program changes or expansions, configuration changes, changes in the numbers of students to be accepted for transfers and other factors associated with the transfer process, and any other changes that would not be known by PRC at the time of their forecast.

STUDENT PERFORMANCE MEASURES

Four Year Cohort Graduation Rates

The four-year cohort graduation rate is the percentage of students in the cohort who earn a high school diploma or modified high school diploma within four years of entering high school. Students earning General Education Development (GEDs), or adult high school diplomas, or extended diplomas are not counted as graduates.

Oregon Department of Education (ODE) calculates graduation rates for accountable schools throughout the state. The graduation cohort for a school is made up of all students in the cohort whose last accountable enrollment was at that school.

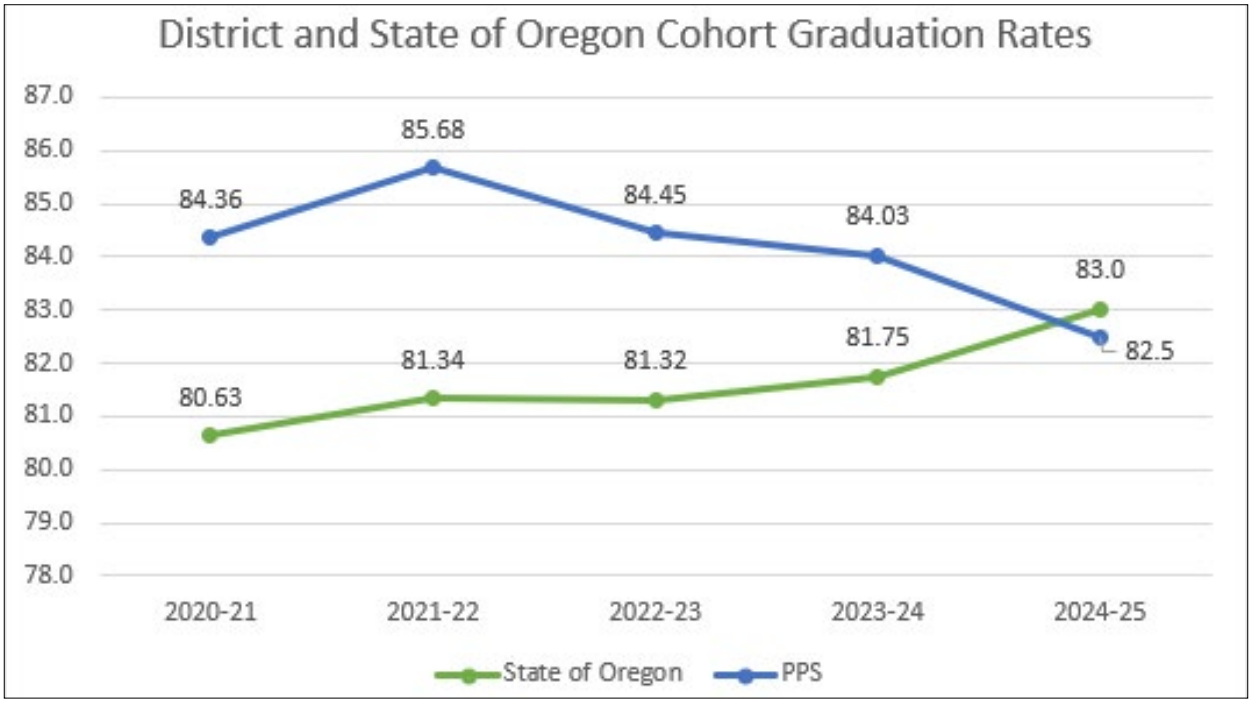
Students leave a school's cohort if they transfer:

- To another accountable school, including a charter school
- Out of the district, state or country
- To home or private school

Students remain in a school's cohort if they:

- Transfer to a community-based alternative program
- Transfer to a non-accountable district program
- Drop out

The following data are the four-year cohort graduation rates. PPS has had a steady decline in the four-year cohort graduation rate and is now lower than the state for the first time in many years. PPS has a large mobile population, which impacts four-year cohort graduation rate, especially if the students moved out of PPS during their high school years. PPS continues to work on plans each year to improve the graduation rate.



Source: ODE Cohort Graduation Rates

Dropout Rates

Dropout rates are one-year rates and are unrelated to the four-year cohort graduation rates. ODE calculates one-year dropout rates for accountable schools throughout the state.

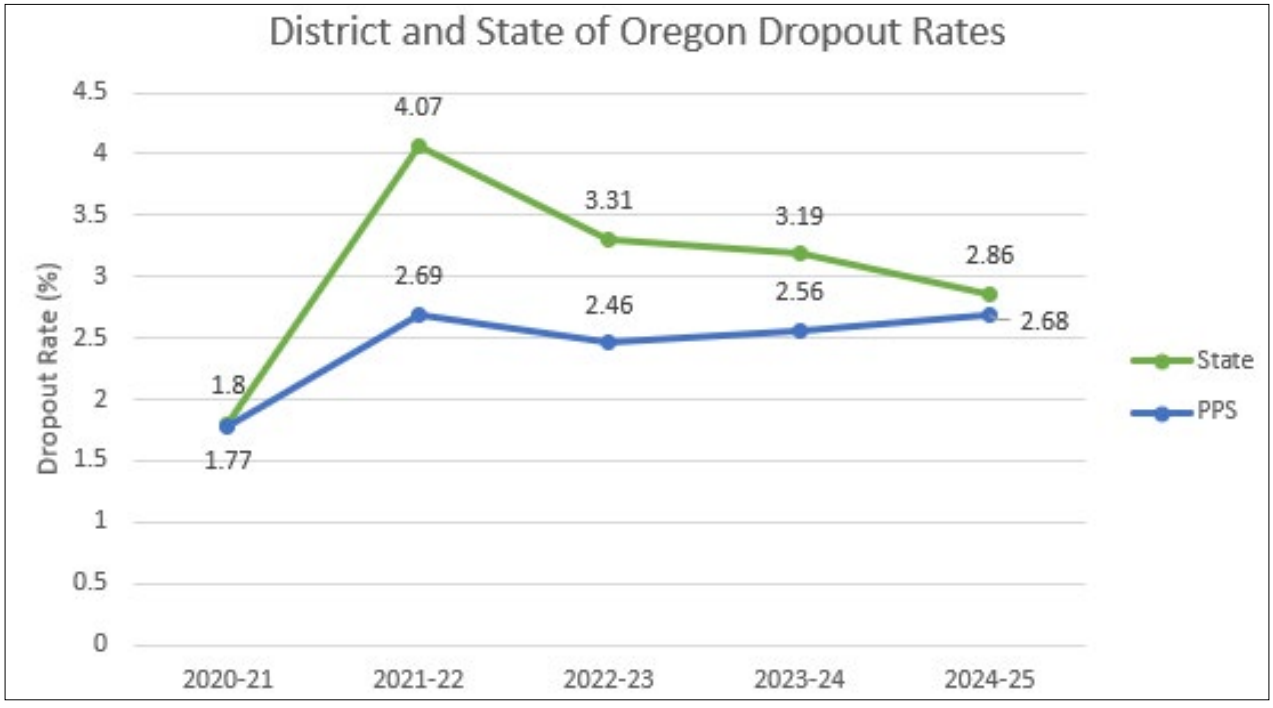
As defined in ORS 339.505, a dropout is an individual who has enrolled for the current school year, or was enrolled in a previous school year and did not attend during the current school year:

- Is not a high school graduate
- Has not received a GED certificate
- Has withdrawn from school

Dropouts do NOT include students who:

- Transferred to another district, state or country
- Transferred to home or private school
- Are enrolled in an alternative school or hospital education program
- Are enrolled in a juvenile detention facility
- Are enrolled in a foreign exchange program
- Are temporarily absent because of suspension, a family emergency, or severe health problems that prevent attendance at school
- Received an Extended Diploma, Adult High School diploma, GED, or alternative certificate
- Are deceased

The following data are the one-year dropout rates. Due to the emergency suspension of the requirement to withdraw students after 10 days of consecutive absence during the COVID pandemic, the dropout rates for 2020-21 were artificially depressed. The spike in 2021-22 was at least partially due to "catchup" from students who normally would have been reported as a dropout in a previous year. The data between 2022-23 and 2024-25 have now normalized and PPS continues to have a lower dropout rate than the State.

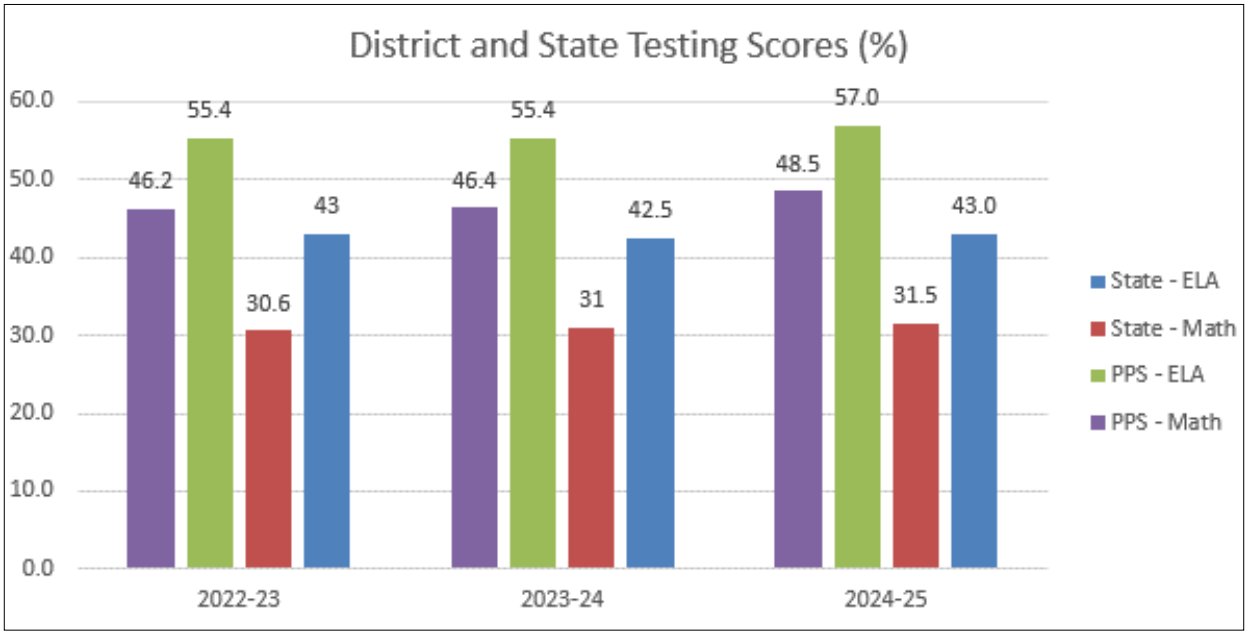


Source: ODE Dropout Rates

ODE Statewide Assessments

Oregon public schools test students in English Language Arts (ELA) and math in grades 3 through 8 and grade 11. Oregon's ELA and math summative assessments go beyond multiple-choice questions to include extended response and technology enhanced items, as well as performance tasks that allow students to demonstrate critical-thinking and problem-solving skills. Performance tasks challenge students to apply their knowledge and skills to respond to complex real-world problems. They can best be described as collections of questions and activities that are coherently connected to a single theme or scenario. These activities are meant to measure capacities such as depth of understanding, writing and research skills, and complex analysis, which cannot be adequately assessed with traditional assessment questions.

Overall results for all schools and grades for PPS and the State for math and ELA are shown below. There has been improvement for PPS again and the students continue to significantly outperform the State in both math and ELA. Additionally, PPS math results are higher than our pre-pandemic results for the first time.



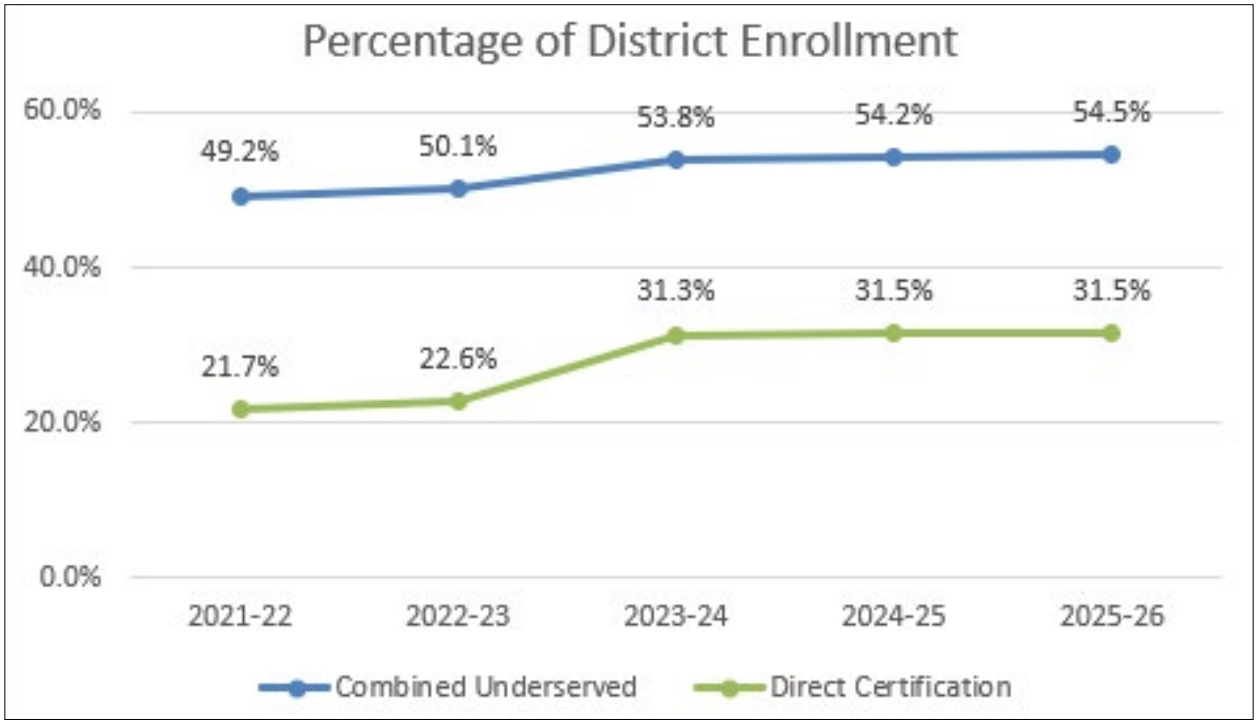
Source: ODE Statewide Assessments

STUDENT DEMOGRAPHICS

Student Equity Demographics

The District has two demographics that are used as measures of equity: Direct Certification and Combined Historically Underserved. Direct Certification is a subset of Combined Historically Underserved. The overall percentages for PPS are displayed below. Both percentages rose in 2023-24, largely due to Medicaid being added as another way for families to qualify for free or reduced priced meals in Oregon. Since then, the percentages have stayed steady.

In 2024-25 and 2025-26 the District went to full Community Eligibility Provision (CEP) so all students could eat for free, regardless of any applications or verification from the State, but Direct Certification data is still shared with the District.



Source: PPS October 1 Enrollment

The Combined Underserved category was originally established by the Oregon Department of Education as part of the requirements of the ESEA Waiver. PPS' current definition of Combined Underserved includes students eligible to receive:

- Free meals by Direct Certification
- Special Education Services
- English Language Development (ELD) services

Or:

- Students with any of the following races, ethnicities, or ancestry:
  - Black
  - Latino/Hispanic
  - Native American
  - Pacific Islander

Students eligible to receive free meals by Direct Certification are students who are eligible for free meals, as identified by the state. Direct Certification status is determined by state agencies and shared electronically with school districts. Students or families qualify for Direct Certification through a number of avenues such as eligibility for Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF), Migrant Ed, McKinney Vento, or foster care, Medicaid.

Direct Certification does not include students eligible for:

- Free or reduced meals by paper application
- Free meals because they are enrolled in a CEP school but are not Direct Certified by the state.

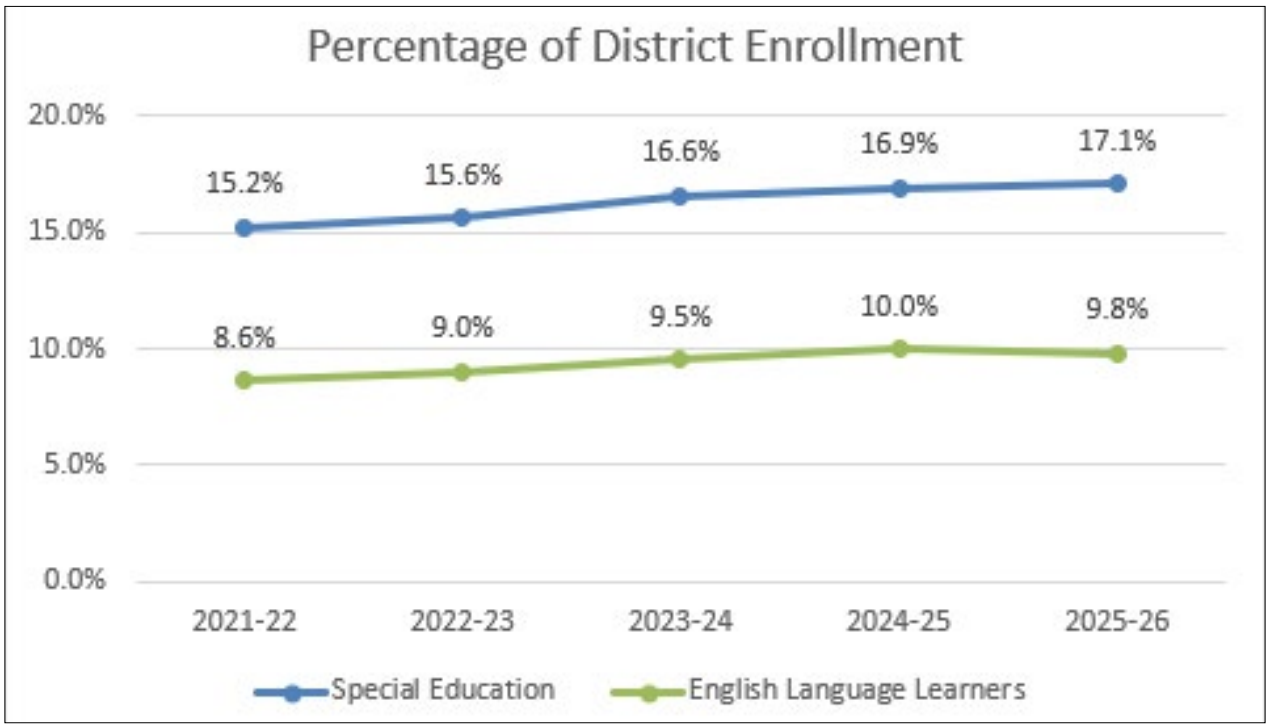
Free Meal by Direct Certification is the only comparable measure of economic hardship across all schools.

Special Education and English Language Learners Subgroups

Students eligible for Special Education are students with an Individualized Education Program (IEP) receiving special education services.

Students identified as English Language Learners are students who are eligible to receive English Language Development (ELD) services.

There has been a slow but steady increase in the percentage of Special Education Students at PPS since 2021-22. Whereas, there has been a slight decline in English Language Learners students in 2025-26.



Source: PPS October 1 Enrollment

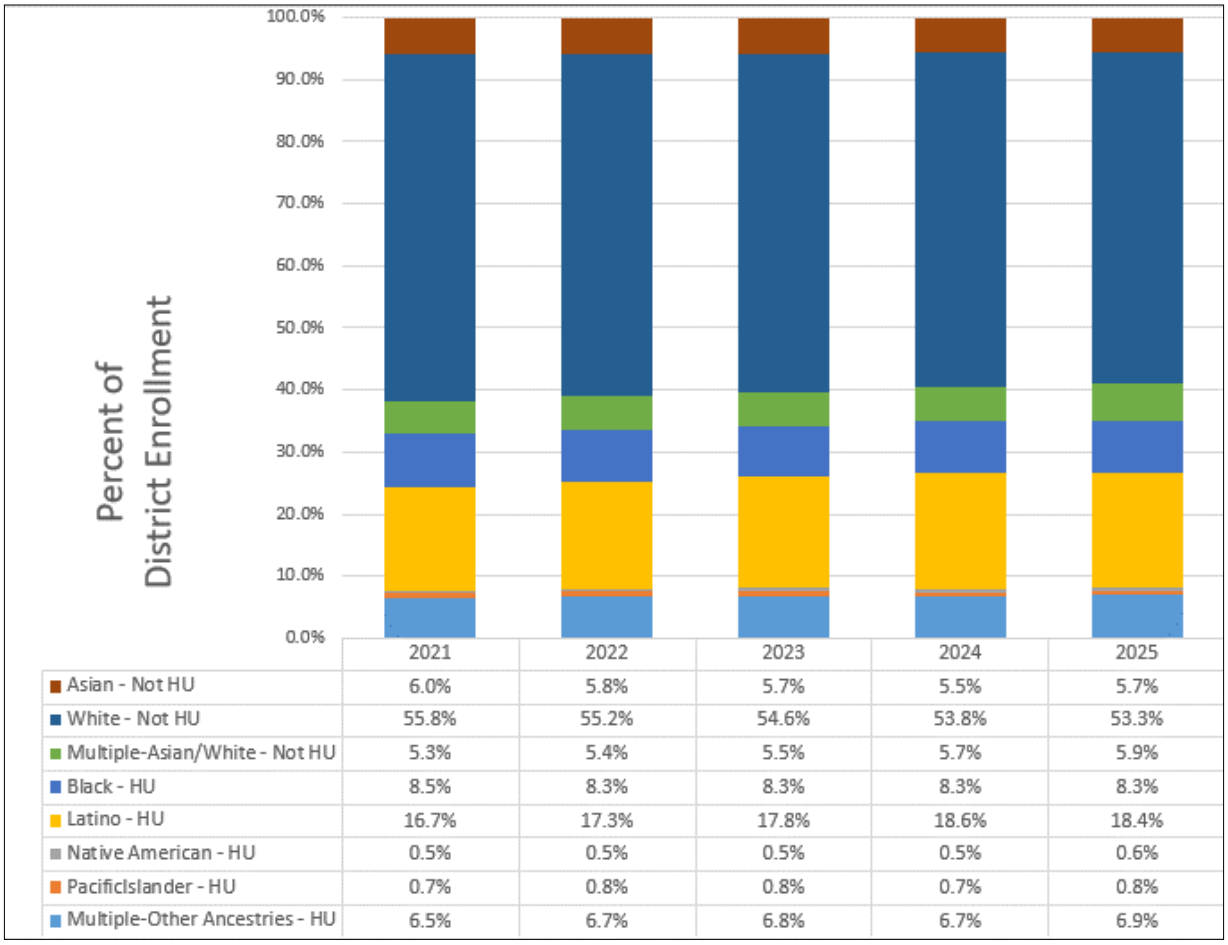
Student Race/Ethnicity Percentages

The overall percentages of PPS students by race/ethnicity has shifted slightly over the past five years. This year there has been a decline in White and Latino students, while the other student groups have had an increase or remained steady. The percentages of students by race/ethnicity vary by school, which can be seen on each of the individual school summaries in Volume II.

Per the Federal race/ethnicity reporting requirements, Latino ethnicity includes students identified as Hispanic/Latino regardless of race.

PPS separates the Multiple Races category into two categories, Multiple-Asian/White, which includes non-Latino students identifying only as Asian and White; and Multiple-Other Ancestries, which includes non-Latino students identifying with multiple races including at least one of Black, Native American, or Pacific Islander.

HU and Not-HU reflects whether or not the race/ethnicity is considered historically underserved (HU).



	2021	2022	2023	2024	2025
Asian - Not HU	6.0%	5.8%	5.7%	5.5%	5.7%
White - Not HU	55.8%	55.2%	54.6%	53.8%	53.3%
Multiple-Asian/White - Not HU	5.3%	5.4%	5.5%	5.7%	5.9%
Black - HU	8.5%	8.3%	8.3%	8.3%	8.3%
Latino - HU	16.7%	17.3%	17.8%	18.6%	18.4%
Native American - HU	0.5%	0.5%	0.5%	0.5%	0.6%
PacificIslander - HU	0.7%	0.8%	0.8%	0.7%	0.8%
Multiple-Other Ancestries - HU	6.5%	6.7%	6.8%	6.7%	6.9%

Source: PPS October 1 Enrollment

CHARTER SCHOOLS

Charter schools are public schools that are intended to provide innovative programs with specific educational philosophies and/or delivery models that offer additional options for students and families within the public school system. District sponsored charter schools have entered into a contract with Portland Public Schools for sponsorship and they maintain a high level of autonomy in exchange for increased accountability. PPS passes through the charter schools' share of the State School Fund based on the funding formula outlined in Oregon's Charter School Law (ORS 338.155). The PPS Charter Schools Office is part of the Multiple Pathways to Graduation Department which supports all contracted schools. A key component of the Charter Schools Office is to provide oversight and support to ensure that terms under the sponsorship agreement are met.

PPS-Sponsored Charter Schools

- KairosPDX Learning Academy – Grades K-5, focused on culturally responsive practices to cultivate student engagement and achievement.
- Le Monde French Immersion Charter School – Grades K-8, French immersion instruction.
- Portland Arthur Academy – Grades K-5, using a Direct Instruction model.
- Portland Village School – Grades K-8, Waldorf-inspired education.
- The Emerson School – Grades K-5, curriculum grounded in project-based learning.

State-Sponsored Charter Schools in PPS[1]

- Cottonwood School of Civics and Science – Grades K-8, offering place-based education.
- Ivy School – Grades K-8, a Montessori charter school.

[1]These state-sponsored charter schools are within the PPS attendance boundary and oversight is provided by the state.

COMMUNITY BASED ORGANIZATIONS (CBOs)

Contracted Private Alternative Schools or more commonly known as Community Based Organizations (CBO schools) complement Portland Public Schools educational re-engagement efforts. Each school provides a unique range of supports for students working toward their PPS diploma or GED.

The funding formula for CBO schools is outlined in state statute (ORS 336.635) and is based on the district's Net Operating Expenditure (NOE). The NOE is a per student rate. This, in conjunction with the number of students to be served and student demographics, are the primary factors PPS uses to determine CBO funding. Funding is detailed in each school's annual contract. This contract also codifies the contractual relationship between PPS and each school.

Funding to CBOs comes from both the General Fund and the Special Revenue fund. Funding amounts in the budget book are projections and will be dependent on external factors (e.g. state school fund, corporate excise taxes, etc.). Specific funding details are outlined in each CBO's annual contract.

CBO Schools Contracted with PPS

- Helensview (funded via state resolution dollars)
- Rosemary Anderson Middle and High School
- Mt Scott Learning Center
- NAYA Many Nations Academy
- Open School East
- Portland Community College: Gateway to College & YES to College
- Portland Youth Builders
- Youth Progress Association

GLOSSARY OF TERMS AND ACRONYMS

A

Account Codes - The account codes identify the nature of the expenditure, and is based on the Oregon Department of Education's Program Budgeting and Accounting Manual. An example of a complete chart of accounts consist of the following elements:

	Object (Account)	Fund	Dept ID	Function (Program)	Area (Class)	Project / Grant*
# of Digits	6	3	4	5	5	5
Account Code	511100	205	2156	11211	18000	G1800
Description of Fund or Use	Licensed Teacher	Grant Fund	George MS	MS Programs	Math	Title I - School

*Project/Grant field is only used if funding is from a project or a grant, such as Title I or SIA.

A complete list of the chart of accounts, with descriptions of products or services, is shown in the Introductory Information section of this book.

Accrual Basis - The basis of accounting under which revenues are recorded when earned or when levies are made, and expenditures are recorded as soon as they result in liabilities, regardless of when the revenue is received or the payment is actually made.

Accrue - To record revenues when earned or when levies are made and to record expenditures as soon as they result in liabilities, regardless of when the revenue is actually received or the payment is actually made.

Accrued Liabilities - Amounts owed but not yet due; for example, accrued interest on bonds or notes.

Accrued Revenues - Levies made or other revenue earned and not collected regardless of whether due or not.

ADA (Americans with Disabilities Act) - A U.S. civil rights law enacted in 1990 that prohibits discrimination against individuals with disabilities in all areas of public life, including employment, education, transportation, and access to public and private spaces open to the general public.

ADM (Average Daily Membership) - Average student enrollment is the measure that indicates the average number of students in membership (enrolled) on any given day over a school year. It is calculated based on the total days students are enrolled (present or absent) divided by the number of days in a school year.

Administrators, Licensed - Persons assigned to administrative or supervisory positions who meet standards of eligibility established and who have training or licensure relevant to specific positions within the District. This includes positions such as the Superintendent, Assistant Superintendents, Senior Directors, School Principals, etc.

Administrators, Non-Licensed - Administrative or supervisory positions not requiring any type of licensure but who meet eligibility and or needs set forth by the District. This category is primarily made up of cabinet level managers that support the business operations of the District.

ADMr (Average Daily Membership Resident) - The average number of students enrolled on a daily basis. Students that the district claims as residents for State School Funding. Some residents may attend school in another district.

ADMw (Average Daily Membership Weighted) - A major component to determine the distribution of funds in the State School Fund is ADMw, which is ADMr with weightings added for the following factors:

Factor	**Weight**		**Data Source**
Special Education	1.00	times	December Special Education Census
English Second Language	0.50	times	ELL, ADM student data submissions
Pregnant & Parenting (P&P)	1.00	times	P&P, ADM Student data submissions
Poverty Factor	0.25	times	Census data - proportionally adjusted
Foster Care/Neglected and Delinquent	0.25	times	Dept. of Human Resources counts

Adopted Budget - The final version of the budget that has been adopted by the Board of Education after a hearing with the Tax Supervising and Conservation Commission (TSCC) and meeting all requirements under local budget law.

Ad Valorem Taxes - Taxes levied on the assessed valuation of real and personal property which, within legal limits, is the final authority in determining the amount to be raised for school purposes.

Ad Valorem Taxes Levied by School System - Taxes levied by a school system on the assessed valuation of real and personal property located within the school system which, within legal limits, is the final authority in determining the amount to be raised for school purposes. Separate accounts may be maintained for real property and for personal property.

Allocations - An appropriation divided into amounts used for certain periods or for specific purposes.

Alternative Education - See Multiple Pathways to Graduation (MPG).

Amortize - The process of gradually paying off a debt or cost over a set period through regular, scheduled payments. These payments typically cover both principal and interest, ensuring the debt is fully paid off by the end of the term. Amortization is commonly used for loans, bonds, or other financial obligations.

Annual Comprehensive Financial Report - An annual report that is required by ORS 297.405-297.555, which represents the District's financial position and activity. This report is audited by an independent firm of Certified Public Accountants.

AP (Advanced Placement) - A program that offers college-level courses and exams to high school students. AP courses allow students to earn college credit or advanced placement at participating colleges and universities, depending on their exam scores.

Appropriation - A legal authorization granted by the school board to make expenditures and to incur obligations for specific purposes. An appropriation is usually limited in amount and the time when it may be expended.

Approved Budget - The version of the budget that has been approved by the Board of Education acting in their capacity as the Budget Committee for PPS.

Area/Class - This is the portion of the account code that identifies a certain group within a function. For example, function 11211 represents Middle School programs and the area indicates whether the expenditure or budget is for art, social studies, technology, science, language arts, etc.

Arts Education and Access Income Tax (Arts Tax) - This local tax funds arts and music teachers for elementary school students for grades K-5.

Assessed Valuation - A valuation set upon real and personal property by a government as a basis for levying taxes.

Assets - Resources owned or held by PPS, which have monetary value.

ATU (Amalgamated Transit Union) - Bargaining representative for Student Transportation bus drivers.

Audit - The examination of records and documents, and the securing of other evidence for one or more of the following purposes: (a) determining the propriety of proposed or completed transactions, (b) ascertaining whether all transactions have been recorded, and (c) determining whether transactions are accurately recorded in the accounts and in the statements drawn from the accounts.

B

Board of Education (also School Board or Board) - Consists of the elected or appointed body, which has been created according to State law, vested with responsibilities for educational activities in a given geographical area. (See the District Overview section of this document for a list of the Directors and the zones to which they were elected).

Bond - A written promise, generally under seal, to pay for a specified sum of money (face value) at a fixed time in the future (date of maturity) and carrying interest at a fixed rate, usually payable periodically. The difference between a note and a bond is that the latter usually runs for a longer period of time and requires greater legal formality.

Bond Discount - The excess of the face value of a bond over the price for which it is acquired or sold. The price does not include accrued interest at the date of acquisition or sale.

Bond Premium - The excess of the price at which a bond is acquired or sold, over its face value. The price does not include accrued interest at the date of acquisition or sale.

Bonded Debt - The part of the school system debt, which is covered by outstanding bonds of the system.

Bridge Year - A transition period during which a program or department might receive some form of interim funding. In regards to Title I, a bridge year refers to a period during which a school may not meet the eligibility criteria to receive funding, but may continue to receive funding if they were eligible to receive Title I funding the previous year and is expected to be eligible to receive Title I funding in the following year.

Budget - Written report showing the local government's comprehensive financial plan for one fiscal year or for a 24-month budget period. It must include a balanced statement of actual revenues and expenditures for each of the last two budgets and estimated revenues and expenditures for the current and upcoming budget. A proposed budget is presented to the budget committee for approval. An approved budget is subsequently adopted as approved or modified by the school board.

Budget Calendar - The District's fiscal year spans from July 1 through June 30. Within this time period, the budget is developed incorporating input from the Board of Education, the Superintendent and staff, the public, and information from the State Legislature regarding the level of School Support Funding (SSF). Budgeting is not simply something done once a year. It is a continuous process taking 12 months to complete a cycle. The budgeting process has five parts. The budget is (1) prepared, (2) approved, (3) adopted, (4) executed, and (5) reviewed by audit. The budget must be prepared far enough in advance so that it can be adopted before June 30. After adopting the budget, the District makes the necessary appropriations and certifies the tax levy to the county assessor.

Budget Document - The instrument used by the budget-making authority to present a comprehensive financial program to the school board, which is the appropriating body. The budget document contains a message from the Superintendent, together with a summary of the proposed expenditures, the means of financing them, and the schedules supporting the summary. These schedules show in detail the information as to past years' actual revenues, expenditures, and other data used in making the estimates.

Budget Officer - The budget officer, or the person or position designated by charter and acting as budget officer, prepares or supervises the preparation of the budget document. The budget officer, unless the charter specifies otherwise, acts under the direction of the executive officer of the municipal corporation or under the direction of the governing body.

Budget Period - A 12 or 24-month period from July 1 through June 30 to which the operating budget applies.

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.

Budgetary Expenditures - Decreases in net current assets. In contrast to conventional expenditures, budgetary expenditures are limited in amount to exclude amounts represented by non-current liabilities. Due to their spending measurement focus, governmental fund types are concerned with the measurement of budgetary expenditures.

C

Capital - Purchases relating to or being an asset of PPS that add to the long-term net worth of the District.

Capital Bond - See Bond.

Capital Outlay - Expenditures which result in the acquisition of or addition to fixed assets.

Capital Projects Fund - This fund is dedicated to major capital improvements, construction and acquisition of school district facilities and often funded with general obligation bonds.

CBRC (Community Budget Review Committee) - A panel appointed by the Board of Education; generally comprised of up to twelve community members and one student representative, which serves to provide a community voice in the budgeting process.

CEIS (Coordinated Early Intervention Services) - A set of services provided by school districts to support students who have not been identified as needing special education but require additional academic or behavioral support to succeed.

CEP (Community Eligibility Provisioning) - A federal program that allows eligible schools and districts to offer free breakfast and lunch to all students without requiring household income applications. CEP simplifies meal program administration and improves access to nutritious meals for students in high-poverty areas.

Classified Employees - There are two categories of classified employees:

1. Non-licensed employees who are represented by a union (ATU, DCU, PFSP, or SEIU), which includes teacher support personnel, paraeducators, educational assistants, library assistants, community agents, campus monitors, school administrative assistants, data clerks, clerical staff, cafeteria staff, maintenance workers, warehouse workers, truck drivers, and bus drivers.

2. Non-licensed employees who are not represented, which includes specialists and analysts who primarily work to support the business operations of the District.

Combined Underserved - Please note that the District uses the following three terminologies interchangeably: Combined Underserved, Combined Historically Underserved, and Historically Underserved. A new subgroup of students originally established by ODE as part of the requirements of the Elementary and Secondary Education Act (ESEA) Waiver. PPS's current definition of Combined Underserved includes the following:

- Students eligible to receive free meals by Direct Certification
- Students eligible for Special Education
- Students eligible to receive English as a Second Language (ESL) services
- Students with any of the following races, ethnicities, or ancestry:
    - Black
    - Latino/Hispanic
    - Native American
    - Pacific Islander

Consolidated Budgets - The discretionary portion of schools' General Fund budget that supports non-FTE resources, including, but not limited to supplies, printing, copy machines, toner, limited-term personnel, extended responsibility, and substitute costs not covered centrally. Schools are allocated a consolidated operating budget each fiscal year (July 1 - June 30), and that information is available for tracking in PeopleSoft Financials starting July 1st. Schools are allocated this budget based on projected enrollment with the following formula:

- K-8 Schools: $10,000 + ($88 x Projected Students)
- High Schools: $50,000 + ($92 x Projected Students)

Construction Excise Tax - In 2007, the Oregon State Legislature passed a law (SB1036) that allows school boards, in cooperation with cities and counties, to tax new residential and non-residential development in order to help school districts pay for a portion of the cost of new or expanded school facilities.

Contingency - A portion of the budget set aside for unforeseen or emergency expenditures that may arise during the fiscal year. This reserve helps ensure that a district or organization can cover unexpected costs without disrupting planned spending. If general operating contingency funds need to be transferred to cover unanticipated expenditures, it requires approval from the governing board to ensure proper oversight and accountability.

Contracted Personnel Services - Services rendered by outside personnel when a particular undertaking requires skills and resources not otherwise available within the school system, including all related expenses covered by the contract.

CSI (Comprehensive Supports for Improvement) - CSI is one of two federally required designations under ESSA. A designation under Every Student Succeeds Act (ESSA) for schools that need significant improvement across the entire school due to low overall performance or persistent achievement gaps. CSI schools are identified when they fail to meet state-determined performance standards over a period of time. These schools are required to implement comprehensive improvement plans, including targeted interventions and strategies, to improve student outcomes and address systemic issues.

CTE (Career and Technical Education) - Educational programs that equip students with practical skills, industry certifications, and hands-on training in various career fields, such as healthcare, technology, manufacturing, and skilled trades.

CTP (Community Transition Program) - Programs or facilities that support students transitioning from alternative education settings, juvenile justice systems, or other specialized programs back into traditional schools, the workforce, or postsecondary education**.**

Current Resources - Resources to which recourse can be had to meet current obligations and expenditures. Examples are current assets, estimated revenues of a particular period not yet realized, transfers from other funds authorized but not received, and in the case of certain funds, bonds authorized and unissued.

D

DART (Day and Residential Treatment) - Portland DART School works alongside mental health care agencies to provide students school services to increase achievement in many academic areas while the students are receiving day or residential mental health treatment.

DCU (District Council of Unions) - Bargaining representative for selected workers of the school district including warehouse workers, truck drivers, bus mechanics, maintenance workers, and television services employees.

Debt Service - This is the cash required in a given period, usually one year, for payments of interest and current maturities of principal on outstanding debt. Debt service in mortgage loans includes interest and principal; in corporate bond issues, the annual interest plus annual sinking fund payments; in government bonds, the annual payments from the debt service fund.

Debt Service Fund - These funds are used to track resources set aside for paying the principal and interest on long-term debt. This fund would cover payments on bonds or other borrowing used for capital projects, PERS UAL bonds, or general fund obligations.

Deficit - The excess of a fund's liabilities over its assets. Oregon school districts may not carry deficits in any fund.

Dept ID (Department ID) - The portion of the account code that identifies a specific school or department that is part of a given program.

Designated Programs - Designated programs include English as Second Language, Teen Parent Programs, Migrant Education, and Summer School.

Direct Certification - Students eligible to receive free meals by Direct Certification are students who are eligible for free meals, as identified by the state. Direct Certification status is determined by state agencies and shared electronically with school districts. Students or families qualify for Direct Certification through a number of avenues such as eligibility for Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF), Migrant Education, McKinney Vento, or foster care. Starting in 2023, Medicaid was added as another way for families to qualify for free or reduced priced meals in Oregon. Students who qualify for free meals via Medicaid are counted as Direct Certification.

Direct Certification does not include students eligible for:

- free or reduced meals by paper application
- free meals because they are enrolled in a CEP school but are not Direct Certified by the state

Free Meal by Direct Certification is the only comparable measure of economic hardship across all schools.

Direct Services - Direct services are activities identifiable with a specific program. Activities involving teaching learners are considered to be direct services for instruction.

District Continuous Improvement Plan (DCIP) - Portland Public Schools DCIP is a set of strategies for improvement within four goal areas: attendance, literacy, mathematics, and 9th grade success.

E

EA (Educational Assistant) - Educational Assistants are classified employees who work alongside or under the direction of a certified staff member. In some cases, they work in a classroom or with groups of children, while in other cases they are assigned to work one-on-one with students who require this level of staffing. EAs are primarily employed to serve in Title I and ESL/Bilingual classrooms.

EAIP (Employer-at-Injury Program) - A program that provides financial incentives and support to employers who offer transitional work opportunities to employees recovering from a workplace injury.

Early Retirement Benefit - This provides for the direct payments to early retirees in accordance with the collective bargaining agreements for certified staff.

EB (Emergent Bilinguals) - Students who are developing proficiency in two or more languages, often referring to those learning English in addition to their native language.

ECEC (Early Childhood Education Centers) - Facilities that provide educational and developmental programs for young children, typically from infancy through preschool age. These centers focus on early learning, social-emotional development, and school readiness.

ECSE (Early Childhood Special Education) - Special education services designed for young children, typically ages 3-5, with developmental delays or disabilities. ECSE programs provide individualized support to enhance learning, communication, and social skills in preparation for kindergarten.

Education Options - See Multiple Pathways to Graduation (MPG).

EI (Early Intervention) - Services and supports for infants and toddlers (birth to age 3) with developmental delays or disabilities.

ELA (English Language Arts) - A core academic subject focused on reading, writing, speaking, and listening skills. ELA instruction develops literacy, comprehension, and communication abilities across grade levels.

ELD (English Learners with Disabilities) - Students who are both English learners and eligible for special education services.

ELPA 21 (English Language Proficiency Assessment for the 21st Century) - A standardized assessment used to measure English language proficiency for students identified as English learners. ELPA 21 evaluates listening, speaking, reading, and writing skills to help determine appropriate language support services.

Employee Benefits - Amounts paid by the District on behalf of employees; these amounts are not included in the base salary, but are over and above. While not paid directly to employees, nevertheless, they are part of the cost of salaries and benefits.

Encumbrance - An obligation chargeable to an appropriation and for which part of the appropriation is reserved.

Enterprise Funds - These account for operations that are financed and operated where the stated intent is that the costs (expenses, including depreciation and indirect costs) of providing goods or services to students are recovered primarily through user charges.

ER (Extended Responsibility) - Additional pay to District employees for activities and responsibilities performed, primarily, outside the standard workday. The varied amounts of pay are contractual under the PAT contract for employees.

ESD (Education Service Districts) - Regional agencies that provide a variety of educational support services to local school districts, such as professional development, special education services, outdoor school programs, and instructional resources.

ESEA (Elementary and Secondary Education Act) - A landmark U.S. federal law originally passed in 1965 that governs the allocation of federal funds to K-12 schools, aiming to improve educational quality and equity.

ESL/ELL - English as a Second Language / English Language Learners programs for identified students.

ESSA (Every Student Succeeds Act of 2015) - ESSA was signed into law in 2015, effectively ending heavy federal involvement in public schools and sending that authority back to states and local school districts. The law replaces No Child Left Behind (NCLB) which gave considerable control to the federal government to set expectations around student achievement and enforce consequences when achievement lagged, including school districts paying to bus students to other schools if families wished to leave failing schools as measured by state test scores. ESSA maintains the goals of NCLB (high standards, accountability, and closing the achievement gap), but no longer focuses on standardized solutions. Students are still required to take yearly tests in math and reading in 3rd through 8th grades and 11th grade, and to publicly report the scores by subgroups such as race, English-language proficiency, poverty, and Special Education. States are required to intervene in schools that are not meeting their goals. The most significant change is that states and local school districts, not the federal government, will now be responsible for developing methods for judging school quality. The new law went into effect in the 2017/18 school year, giving states time to develop the new school quality standards.

Expenditures - Decreases in net financial resources. Expenditures include current operating expenses, which require the current or future use of net current assets, debt service, and capital outlays.

F

Fall Enrollment - Number of students enrolled in school on October 1st.

FFCO (Full Faith and Credit Obligations) - Debt securities issued by a government entity backed by the issuer's full faith and credit. This means that the issuer guarantees the repayment of the debt, using its taxing authority and other revenue sources to meet its obligations.

FICA (Federal Insurance Contributions Act) - A U.S. federal law that mandates payroll taxes to fund the Social Security and Medicare programs. FICA requires both employees and employers to contribute a percentage of wages, with the funds used to provide benefits for retirees, disabled individuals, and others eligible for Social Security, as well as for healthcare services through Medicare.

Fiduciary Fund - These funds are used for resources held in trust for others, and the government does not use these resources for its own benefit. These funds are found in the category Trust and Agency Fund**.**

Fiscal Year - A 12-month period from July 1 through June 30 to which the annual operating budget applies.

Fixed Assets - Assets purchased and intended for long-term use such as land, building, improvements, machinery, and equipment.

FTE (Full Time Equivalent) - A unit of measurement used to represent the work schedule of an employee in terms of a full-time workload. One FTE is typically defined as a position that requires eight hours of work per day, or 40 hours per week. FTE is used to quantify the total work performed, regardless of the number of individuals in the position. For example, two individuals working half-time (4 hours per day) would together equal 1.0 FTE. This helps organizations track staffing levels and allocate resources effectively.

Function/Program - The portion of the account code that identifies an activity within the organization for personnel, goods, and services.

Fund - A fiscal and accounting entity with a self-balancing set of accounts in which cash or other financial resources; all related liabilities, residual equities, or balances; and changes therein, are recorded and segregated to carry on specific activities or attain certain objectives in accordance with special regulations, restrictions or limitations.

The State chart of accounts is as follows:

- Governmental Funds
  - General funds (numbered in the 100 series)
  - Special Revenue funds (numbered in the 200 series)
  - Debt Service funds (numbered in the 300 series)
  - Capital Projects funds (numbered in the 400 series)
- Proprietary Funds
  - Enterprise funds (numbered in the 500 series)
  - Internal Service funds (numbered in the 600 series)
- Fiduciary Fund
  - Trust and Agency Funds (numbered in the 700 series)

G

GAAP (Generally Accepted Accounting Principles) - A widely accepted set of rules, conventions, standards, and procedures for recording and reporting financial information, as established by GASB.

Gap Bonds - Any portion of a local government's property tax levy that is used to repay qualified taxing district obligations. Qualified taxing district obligations include principal and interest on any bond or formal, written borrowing of moneys issued before December 5, 1996, for which ad valorem property tax revenues have been pledged or explicitly committed or that are secured by a covenant to levy. Also included are pension and disability plan obligations that commit property taxes and impose property taxes to fulfill those obligations.

GASB (Government Accounting Standards Board) - The mission of GASB is to establish and improve standards of state and local governmental accounting and financial reporting that will result in useful information for users, and guide and educate the public.

GED (General Education Development) or (General Equivalency Diploma) - A series of tests that, when passed, demonstrate a person has the same knowledge and skills as a traditional high school graduate, essentially serving as a high school equivalency diploma.

General Fund - The primary fund used to account for all financial resources except those required to be accounted for in another fund. It covers the operations of schools, including expenditures for salaries and benefits, supplies, textbooks, utilities, and other general expenses.

GFOA (Government Finance Officers Association) - A professional organization that provides support, education, and guidance to individuals working in government finance.

GO (General Obligation) Bonds - A type of municipal bond issued by local or state governments that is backed by the full faith and credit of the issuing government. These bonds are repaid through revenue generated from taxes or other general revenue sources.

Governmental Funds - These funds are used to account for activities that are supported by taxes, grants, and other governmental sources of revenue(General Fund, Special Revenue Funds, Debt Service Funds, and Capital, Project Funds).

Grant - A donation or contribution in cash which may be made to support a specific or general purpose or function.

H

HACCP (Hazard Analysis and Critical Control Point) - A systematic approach to food safety that identifies, evaluates, and controls hazards that could affect the safety of food during its production, processing, and distribution.

Head Start - Head Start is a child development program that serves low-income three and four-year-old children and their families. Section 645 of the Head Start Act (42 U.S.C. 9840) establishes income eligibility for participation in Head Start programs by reference to the official poverty line, adjusted annually in accordance with changes in the Consumer Price Index.

HOH (Hard of Hearing) - A term used to describe individuals who have some degree of hearing loss, but who are not completely deaf.

HU (Historically Underserved) - Refer to Combined Underserved.

I

IDEA (Individuals with Disabilities Education Act) - A U.S. federal law that ensures students with disabilities receive a free and appropriate public education (FAPE) in the least restrictive environment (LRE). IDEA mandates that public schools provide special education services and accommodations to meet the individual needs of students with disabilities, including those with physical, sensory, cognitive, or emotional impairments. The law also outlines procedural safeguards for parents and children, ensuring they are involved in the educational decision-making process.

IEP (Individualized Education Plan/Program) - By law, each student with a special education placement must have an IEP. The IEP must include certain information about the child and the educational program designed to meet their unique needs.

Indirect Costs - A cost necessary for the functioning of the organization as a whole, but which cannot be directly assigned to one service.

Interfund Loans - Loans made by one fund to another and authorized by resolution or ordinance.

Interfund Transfers - Amounts moved from one fund to finance activities in another fund. They are shown as expenditures in the originating fund and revenues in the receiving fund.

Internal Service Fund - A fund used to account for the financing of goods or services provided by one department or agency to other departments within the same government on a cost-reimbursement basis.

IT (Information Technology) - The use of computers, software, networks, and other technology systems to store, process, manage, and communicate data. IT encompasses a broad range of services, including network administration, software development, cybersecurity, data management, and technical support, all aimed at ensuring the efficient and secure operation of technology systems.

K

K or KG (Kindergarten) - The first year of formal education, typically for children around five years old, preceding first grade.

L

LEA (Local Education Agency) - A local government entity, such as a school district, responsible for overseeing and managing public education within a specific geographic area.

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

LGIP (Local Government Investment Pool) - A state-managed investment pool that allows local government entities, such as municipalities, school districts, and other public organizations, to invest their surplus funds collectively. Managed by the Oregon State Treasury, the LGIP offers local governments a safe, liquid, and competitive investment option, primarily in short-term, low-risk financial instruments. The pool aims to maximize returns while maintaining security and accessibility for public funds. Participation is governed by Oregon Revised Statutes and is designed to help local entities efficiently manage their finances.

Liabilities - Debt or other legal obligations arising out of transactions in the past which must be liquidated, renewed, or refunded at some future date. This term does not include encumbrances.

Licensed Employees - Includes teachers, counselors, media specialists (librarians), psychologists, social workers, nurses, athletic trainers, occupational speech, and physical therapists.

Licensed Equivalent - See Weighted FTE.

Limited Term Employee - Limited Term employees are those hired for short-duration or sporadic work during the school or fiscal year. Generally, no benefits are associated with these positions. They may work any number of hours per week, for a total of up to 780 hours per year in the same assignment.

Local Option Tax - Voters may be asked to approve temporary taxing authority that is in addition to the taxes generated by the permanent tax rate. Local option taxes can be for general operations, a specific purpose or capital projects. They are limited to five years unless they are for a capital project, then they are limited to the useful life of the project for 10 years, whichever is less.

LTHT (Less-Than-Half-time) Employees - LTHT employees are those hired for 19 or fewer hours per week for one or more school or fiscal years. Benefits are generally not associated with these positions. Note however, that a LTHT employee with multiple jobs may easily surpass 20 hours per week and thus earn full benefits.

M

MAP (Measures of Academic Progress) - A standardized assessment tool used to measure students' academic growth and proficiency in subjects such as mathematics, reading, and language usage.

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.

Measure 47 - Property tax limit passed by Oregon voters in November 1996, rolling taxes back to 1995-96 levels less 10% and capping future increases by 3% annually.

Measure 50 - Initiative referred by legislature and approved by voters in 1997 to clarify and implement Measure 47.

MESD (Multnomah Education Service District) - State-established Education Service District (ESD) to provide regional services to school districts within Multnomah County.

MPG (Multiple Pathways to Graduation) - Formerly Alternative Education and Education Options are programs and services available for students whose academic and social needs are not being met effectively in traditional school settings. Options include school-within-school programs in high schools, night schools, or programs located at separate locations.

MTSS (Multi-Tiered Systems of Support) - A comprehensive framework used in schools to provide targeted support for students' academic, behavioral, and social-emotional needs.

N

NCLB (No Child Left Behind) Act - A U.S. federal law passed in 2001 that aimed to close achievement gaps and ensure all students received a high-quality education. The law focused on standardized testing, accountability, and performance-based funding for schools, with the goal of improving educational outcomes for disadvantaged students. It was replaced by the Every Student Succeeds Act (ESSA) in 2015.

NS (Nutrition Services) - Programs and services provided to ensure that students have access to nutritious meals, promoting healthy eating habits and supporting academic performance.

O

OAR (Oregon Administrative Rules) - Rules written to clarify and implement Oregon law, and has the authority of law.

ODE (Oregon Department of Education) - The state agency responsible for overseeing K-12 public education in Oregon. ODE works to ensure that all students have access to quality education and provides resources, guidance, and support to school districts, educators, and students. It also administers state and federal education programs and policies in Oregon.

OEBB (Oregon Educators Benefit Board) - A state board that manages health insurance and benefit plans for Oregon public school employees, including teachers, administrators, and other educational staff. OEBB offers a variety of health benefits, such as medical, dental, and vision insurance, as well as wellness programs, to help ensure the well-being of education professionals across the state.

Operating Budget - Plans of current expenditures and the proposed means of financing them. The annual operating budget is the primary means by which most of the financing acquisition, spending, and service delivery activities of a government are controlled. The use of annual operating budgets is required by law.

OPERS (Oregon Public Employees Retirement System) - A retirement system that provides pension benefits to Oregon public employees, including teachers, state workers, and local government employees. OPERS offers retirement, disability, and survivor benefits, and is funded through employee and employer contributions, as well as investment returns.

ORS (Oregon Revised Statute) - A collection of laws enacted by the Oregon State Legislature that governs various aspects of life in Oregon, including criminal law, civil law, education, taxation, and more. The ORS serves as the official body of state law in Oregon and is periodically updated through legislative sessions.

OSBA (Oregon School Boards Association) - A non-profit organization that supports and represents school boards in Oregon. OSBA provides advocacy, training, and resources to school board members and administrators, helping them govern and lead K-12 public schools in the state. The association also works on policy issues affecting education at the state and national levels.

OSCIM (Oregon School Capital Improvement Matching Program) - A state program designed to assist school districts in Oregon with funding for capital improvements and facility modernization projects. OSCIM provides matching grants to help districts improve and maintain their school buildings and facilities.

P

P&P (Pregnant & Parenting) - Programs and services designed to support students or individuals who are pregnant or parenting while continuing their education.

PAPSA (Portland Association of Public School Administrators) - PAPSA is the professional association which represents licensed school administrators employed by PPS.

Paraeducator (Paraprofessional Educator) - As Part of the No Child Left Behind Act (NCLB), there were new requirements for paraeducators working in Title I schools or programs funded by Title I. These requirements applied only to paraeducators who provide instructional support under the direction of teachers and must be met at the time of hire. The following job titles at PPS provide instructional aid and are thus required to meet the NCLB requirements:

- ESL Bilingual Assistants
- Certified Nursing Assistants
- Community Agents
- Educational Assistants
- Instructional Technology Assistants
- Library or Media Center Assistants
- Special Education Paraeducators - Levels I, II and III

However, paraeducators who have one of the above job titles, but do NOT provide any instructional assistance, may not be required to meet the NCLB requirements if they work in the following areas:

- Playground supervision
- Personal care services
- Non-instructional computer assistance
- Serve solely as translators
- Work only with parental involvement activities

PAT (Portland Association of Teachers) - PAT represents professional educators employed by PPS, including teachers, counselors, media specialists (librarians), student management specialists, and others.

PAT Contract, General Education IEPs - Professional educators who are required to conference regarding IEPs shall have a substitute provided to allow for such meetings to occur within the workday. If a unit member volunteers to attend such a conference outside of the workday, such member shall be compensated at his/her per diem hourly rate.

PAT Contract, Special Education IEPs - In addition to contractually provided planning days, special education professional educators assigned to conference with parents and write IEPs shall be provided release time for that purpose. A special education unit member may elect to use these hours before or after the school year or outside his/her workday at this/her per diem hourly rate of pay.

PAT Contract, TAG/504 Plans - Professional educators who are required to write student plans other than IEPs, including Gifted Student plans or 504 plans, shall be provided at the member's option either release time or compensation at his/her per diem hourly rate.

PBAM (Program Budgeting and Accounting Manual) - This ODE manual guides PPS' budgeting and accounting codes and structures.

PCC (Portland Community College) - A community college in Oregon, offering a wide range of academic, career, and technical education programs. PCC provides students with opportunities for workforce training, associate degrees, transfer pathways to four-year universities, and continuing education.

PCL (Portland Children's Levy) - A voter-approved local funding initiative that supports programs benefiting Portland's children, particularly in early childhood education, after-school programs, child abuse prevention, foster care, and hunger relief.

PE (Physical Education) - A school-based program that promotes physical activity, health, and fitness through structured exercise, sports, and movement-based learning.

PEC (Dr. Matthew Prophet Education Center or Prophet Education Center) - Name of headquarters of Portland Public Schools, located at 501 North Dixon Street, across from the Rose Quarter in North Portland.

PEIP (Portland Early Intervention Program) - A program that provides early intervention services for young children with developmental delays or disabilities in Portland. PEIP supports children and their families through assessments, specialized instruction, and therapies to promote early learning and development.

PEP (Population Estimates Program) - A program of the U.S. Census Bureau that provides annual estimates of population size and demographics for states, counties, cities, and other geographic areas.

PERS (Public Employees Retirement System) - A retirement system that provides pension and retirement benefits to public employees, including teachers, state workers, and local government employees. PERS is funded through employer and employee contributions and investment returns, ensuring financial security for public sector workers after retirement.

PFSP (Portland Federation of School Professionals) - PFSP represents classroom educational assistants, paraeducators, school administrative assistants, clerks, certified occupational therapy assistants, licensed physical therapy assistants, campus monitors, and community agents employed by PPS.

PLC (Professional Learning Community) - A collaborative group of educators who work together to improve teaching practices and student learning outcomes. PLCs focus on data-driven decision-making, continuous professional development, and sharing best practices to enhance instructional effectiveness.

POB (Pension Obligation Bonds) - Bonds issued by a government entity to fund its pension liabilities.

Post Retirement Benefit - The program provides health and welfare medical benefits to qualified retired District employees. Qualifications require the employee to have 15 years of employment with the District and must qualify for PERS retirement benefits. Benefits are afforded for 5 years upon qualifying, but not beyond age 65.

PPS (Portland Public Schools or District) - The largest school district in Oregon.

PRC (Population Research Center) - A research institute, often affiliated with universities, that analyzes demographic data, population trends, and projections. PRCs support policy development, urban planning, and resource allocation by providing accurate and timely demographic information. In Oregon, the PRC at Portland State University produces official population estimates and forecasts for the state.

Prior Year Taxes - Taxes levied for fiscal years preceding the current one. Revenues from these taxes are treated as non-tax resources in the current budget.

Program Budget - A budget based on the programs of district offices.

Project/Grant ID - The portion of the account code that identifies a specific project account, grant account, or dedicated resource account within a given fund.

Property Taxes - Ad valorem tax certified to the county assessor by a local government unit.

Proposed Budget - Financial and operating plan prepared by the budget officer and submitted by the Superintendent to the Budget Committee and public for review.

Proprietary Fund - This fund is used to account for government activities that operate similar to private sector businesses, where goods or services are provided and fees are charged to users. The funds are categorized as either enterprise funds or internal service funds.

PSAT (Preliminary Scholastic Aptitude Test) - A standardized test administered to high school students as a preparatory exam for the SAT.

PTA (Parent Teacher Association) - A national organization that brings together parents, teachers, and school staff to advocate for students and improve educational experiences.

Publication - Public notice given by publication in a newspaper of general circulation within the boundaries of the local government; mailing through the U.S. Postal Service by first class mail to each street address within the boundaries of the local government; and hand delivery to each street address within the boundaries of the local government.

Q

QMHP (Qualified Mental Health Professional) - A licensed or certified professional with specialized training and experience in mental health care.

QZAB (Qualified Zone Academy Bonds) - A federal bond program that provides low- or no-interest financing to eligible public schools for renovations, technology upgrades, and educational improvements. QZABs were designed to support schools serving low-income communities by fostering partnerships with businesses and community organizations.

R

Requirement - The sum of all appropriated and unappropriated items in a given fund. Total requirements must always equal total resources in a fund.

Reserve Fund - Established to accumulate money over time for a specific purpose, such as purchase of new equipment.

RESJ (Racial Equity & Social Justice) - In 2011, PPS adopted a Racial Educational Equity Policy that called out harmful disparities in its schools and identified the district's role in eliminating them. Since then, several achievements have been made, but there is collective acknowledgement that there is still much work remaining to ensure all students experience equitable outcomes. Current leadership has embarked on an inclusive planning process to identify the most urgent areas of opportunity to continue this work and to incorporate efforts into its five-year road map for RESJ. The goal is to elevate RESJ practices into a comprehensive, defined framework with clear system-wide equity and social justice actions, and measurable results. The current primary focus of the RESJ lens is on race and ethnicity as that will allow direct improvements in other dimensions of diversity.

Resolution - A formal order of a governing body (the Board); it has lower legal status than an ordinance.

Resources - Estimated beginning fund balances on hand at the beginning of the fiscal year, plus all anticipated revenues.

Restructuring - A school identified for restructuring is a school that has not made Adequate Yearly Progress (AYP) for five years. The first year of restructuring may be used for planning, and the plan must be implemented no later than the second year. This was established as part of the NCLB Act.

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

RHIS (Retirement Health Insurance Subsidy) - A financial benefit that helps eligible retirees cover a portion of their health insurance premiums.

RMV (Real Market Value) - The estimated price a property would sell for in an open and competitive market. RMV is used for property tax assessments and reflects factors such as location, market conditions, and property characteristics.

RZED (Recovery Zone Economic Development) Bonds - A type of taxable bond created under the American Recovery and Reinvestment Act (ARRA) of 2009 to help local governments finance infrastructure and economic development projects in designated recovery zones.

S

SAT (Scholastic Aptitude Test) - A standardized college entrance exam widely used in the United States to assess students' readiness for higher education.

SBAC (Smarter Balanced Assessment Consortium) - Oregon is part of a team of states working together voluntarily to develop K-12 assessments in English language arts/literacy and mathematics aligned to Oregon's Common Core State Standards. These tests, called Smarter Balanced Assessments, are delivered online and include questions that adapt to each individual's performance. The Performance Task feature mimics real world application of a student's knowledge and skills.

SBT (Strategic Budget Team) - A group of PPS central office leaders and school principals who makes budget decisions using a RESJ Lens.

School Board - See Board of Education.

SEIU (Service Employees International Union) - This group represents Nutrition Services and Custodial employees in PPS.

SEL (Social Emotional Learning) - An educational framework that helps students develop essential life skills, including self-awareness, emotional regulation, social skills, empathy, and responsible decision-making.

Service Area Direction - Activities associated with managing and directing a given program within a department.

SIA (Student Investment Account) - A funding initiative in Oregon designed to support K-12 public schools by increasing student success, reducing academic disparities, and improving mental and behavioral health services. SIA funds are allocated to school districts to enhance programs, hire staff, and provide resources that directly benefit students, especially those from historically underserved communities.

SIP (School Improvement Plan) - A strategic plan developed by schools to identify goals, strategies, and actions for improving student achievement and overall school performance. SIPs are based on data analysis and typically focus on academic growth, professional development for educators, and resource allocation to address areas of need.

SKIP (Screening Kids for Intervention & Prevention) - Early intervention screening for children from birth to age 5.

SLC (Structured Learning Centers) - Specialized educational programs within schools designed to support students with significant academic, behavioral, or social-emotional needs.

SNAP (Supplemental Nutrition Assistance Program) - A federal assistance program that provides eligible low-income individuals and families with funds to purchase food. SNAP benefits, distributed via an Electronic Benefit Transfer (EBT) card, help improve food security and ensure access to nutritious meals.

Special Revenue Fund - This fund accounts for specific revenue sources received from federal, state, and private grants. Some examples are funds for disabled students, funds for educationally disadvantaged students, funds for drug and alcohol prevention, and funds for professional development. Money that schools receive from students and parent groups for purposes such as special school projects, field trips, and various student activities may be recorded here.

SPED (Special Education) - A range of educational programs and services designed to meet the needs of students with disabilities. These services are provided in compliance with state and federal laws, such as the Individuals with Disabilities Education Act (IDEA). SPED programs offer individualized instruction, accommodations, and support to help students with disabilities succeed academically, socially, and emotionally in school settings.

SRGP (Seismic Rehab Grant Program) - A state-funded program that provides grants to schools, public buildings, and other structures in Oregon to help them meet seismic safety standards. The goal of the SRGP is to fund the retrofitting of older buildings that may be at risk during an earthquake, ensuring that these structures are safer and more resilient in the event of a seismic event.

SSA (Student Success Act) - A 2019 law in Oregon designed to provide increased funding for K-12 education through a new tax on businesses. The SSA focuses on improving student outcomes by providing resources for mental health services, early education, reducing achievement gaps, and supporting high-quality instruction.

SSF (State School Fund) - This is the major appropriation of state support for public schools. The State School Fund is distributed to school districts on a weighted student basis (see ADM-w). The formula makes weighting adjustments to consider the additional cost of operating remote small schools, and includes reimbursement of student transportation costs. The State School Fund is also adjusted based on local property taxes. For more information, go to the following website: https://www.oregon.gov/ode/schools-and-districts/grants/Pages/School-District-and-ESD-payment-Statements.aspx

Staffing Ratio - The staffing ratio is the ratio of students to staff (e.g., 24.5:1) and is the primary measure used to allocate staff to schools. Class size may be higher than the staffing ratio because counselors and specialists in areas such as Music, Media, and PE are also included in the staffing ratio; or a principal can decide to lower class size by not having as many specialists teaching in the school. Information about how schools are staffed is shown in the School Staffing section of this document.

State of Oregon (State) - The 33rd state of the United States, located in the Pacific Northwest region.

Supplemental Budget - A supplemental budget is prepared to meet unexpected needs or to spend revenues not anticipated at the time the regular budget was adopted. A supplemental budget cannot be used to increase a tax levy.

Supplemental Educational Services (SES) - Supplemental educational services are additional academic services designed to increase the academic achievement of low-income students in low-performing schools. These services may include tutoring, remediation, or other educational interventions that are consistent with the content and instruction used by ODE. Supplemental education services must be provided outside of the regular school day and must be high quality, research-based, and specifically designed to increase student academic achievement.

T

TAG (Talented and Gifted) - Programs and services provided to students identified as TAG as required by State law.

TANF (Temporary Assistance for Needy Families) - A federal assistance program that provides financial aid and support services to low-income families with children. The program is administered by state governments, with specific eligibility and benefit amounts varying by state.

Tax Rate - The amount of tax stated in terms of a unit of tax for each $1,000 of assessed value of taxable property.

Title I - Title I, Part A is a federal program that provides funding to support students in high-poverty areas who are at risk of failing to meet state academic standards. In Portland Public Schools (PPS), Title I includes two programs:

- Targeted Assistance Program: Provides extra support to identified students based on specific criteria (e.g., test scores). Services include in-class, pull-out instruction, and extended programs. Title I teachers work closely with students, staff, and parents.
- Schoolwide Program: Schools with at least 33% of students qualifying for free meals (elementary/middle) or 46.9% (high school) may implement this program. It focuses on improving outcomes for all students in the school by using Title I funds flexibly across all students, not just those identified as at risk.

Most Title I schools in PPS operate under the Schoolwide Program, which promotes collaborative efforts to improve academic achievement for all students.

TOSA (Teachers on Special Assignment) - A role in which educators take on special duties or projects outside of regular classroom teaching. TOSAs are typically assigned to support curriculum development, staff training, mentoring, or administrative tasks. This position allows teachers to use their expertise in a more specialized capacity while still being connected to the educational environment.

TPA (Third Party Administrator) - An organization or company that manages and administers benefits, insurance, or pension plans on behalf of another entity, such as an employer, government, or insurance provider. TPAs handle various tasks, including claims processing, customer service, and compliance, acting as an intermediary between the plan sponsor and the individuals enrolled in the program.

Transfers - Amounts distributed from one fund to finance activities in another fund. These are shown as an expenditure in the originating fund and revenue in the receiving fund.

Trust and Agency Funds - A fiduciary fund is used to account for resources held by a school district in a trustee or agency capacity for others, and these resources cannot be used for the school district's own benefit. These funds are typically managed in accordance with legal or contractual obligations.

TSCC (Tax Supervising and Conservation Commission) - TSCC is an independent, impartial panel of volunteers established to monitor the financial affairs of local governments. The Oregon Legislature created TSCC in 1919 (Chapter 375), with the first TSCC being organized in 1921. TSCC has jurisdiction over all local governments that are required to follow local budget law and which have more real market value within Multnomah County than in any other county. TSCC presently oversees the budgeting and taxing activities of thirty-nine municipal corporations, including Oregon's largest: city (Portland), county (Multnomah), school district (Portland), community college (PCC), education service district (Multnomah), port (Portland), mass transit district (Tri-Met), regional government (Metro), and urban renewal agency (Prosper Portland). In total, these 42 entities employ more than 32,000 full time equivalent positions (FTE) and have budgets totaling over $17 billion.

TSI (Targeted Supports for Improvement) - TSI is one of two federally required designations under ESSA. A designation under the Every Student Succeeds Act (ESSA) for schools that have one or more subgroups of students who are underperforming and require additional support. TSI schools are identified based on student achievement gaps, and they must develop and implement improvement plans to address the specific needs of these subgroups.

U

UAL (Unfunded Actuarial Liability) - The portion of a pension plan's liability that is not covered by its current assets. UAL represents the shortfall between the amount needed to fulfill pension obligations and the funds available to cover them.

UEFB (Unappropriated Ending Fund Balance) - The portion of a district's budget that is carried over to the next fiscal year to ensure the district has sufficient cash flow until new revenues are received. The UEFB helps provide financial stability and acts as a reserve to manage unexpected costs or delays in revenue. This amount cannot be transferred by resolution or used through a supplemental budget during the fiscal year, and it is typically not allocated for specific expenditures.

USDA (United States Department of Agriculture) - A federal agency responsible for overseeing policies related to agriculture, food safety, nutrition, rural development, and natural resources. The USDA supports American farmers, promotes agricultural exports, and administers nutrition assistance programs such as SNAP (Supplemental Nutrition Assistance Program).

V

VAPA (Visual and Performing Arts) - A discipline in education that includes creative fields such as music, theater, dance, visual arts, and media arts. VAPA programs aim to foster creativity, cultural expression, and artistic skills, providing students with opportunities to explore and develop their artistic talents.

W

Weighted FTE (also referred to as Licensed Equivalent FTE) - Staff allocations for schools primarily consist of licensed staff (i.e., certified teachers). The allocation also includes administrative staff such as principals (licensed administrators) and school administrative assistants (classified staff). For staffing purposes only, school administrators can convert FTEs allocated for licensed staff to classified staff at a 1:2 ratio. For example, 1.0 licensed FTE could be used to hire 2 full-time classified employees who are represented by a union. Therefore, classified employees are valued as "half-weighted," though a full-time equivalent classified employee would still show as a 1.0 position FTE.

Y

YTP (Youth Transition Program) - A program designed to help young individuals with disabilities transition from school to adulthood, particularly focusing on post-school outcomes such as employment, independent living, and further education.



Prophet Education Center - District Student Council, October 21, 2025



Kelly Elementary School - Leap and Summer Programs, July 2025

APPENDICES



APPENDICES

Rose City Park Elementary School - Tet Celebration, February 13, 2026

EXPENDITURES OVERVIEW

The following pages provide a detailed listing of object codes that align with the State's chart of accounts. These codes correspond to the expenditure details found in both the General Fund Requirements by Object and the Other Funds section of this document. Each object code represents a specific category of expenditure, indicating how funds have been allocated, budgeted, and expended. This classification helps ensure consistency and transparency in financial reporting, facilitating accurate tracking and analysis of state expenditures.

510000 - Salaries

Amounts paid to employees of the District who are considered to be in a position of a permanent nature or hired temporarily, including personnel substituting for those in permanent positions. This includes gross salary for services rendered while on the payroll of the District.

Regular Salaries - Full-time, part-time, and prorated portions of the costs for work performed by employees of the District who are considered to be in positions of a permanent nature.

511100 Licensed Staff

- CLASSROOM TEACHERS: (e.g., Alternative Programs, Elementary, Middle, High School, Special Education, ESL, etc.)
- EDUCATIONAL SUPPORT, COUNSELORS, OTHER LICENSED STAFF: (e.g., Interventionists, Psychologists, Social Workers, Speech-Language Pathologists, Mentors, and Specialists)

511210 Classified - Represented

- CLERICAL PERSONNEL, EDUCATIONAL SUPPORT PERSONNEL – NON-LICENSED, OPERATIONS, SECURITY, TRANSPORTATION PERSONNEL
- CAFETERIA AND CUSTODIAL STAFF
- MAINTENANCE STAFF: (e.g., Engineers, Technicians, Trades)
- DRIVERS: Bus and Transportation Staff
- Temporary classified help (limited term employees) is charged to object 512400 and contracted secretarial services are charged to object 538900.

511220 Non-Represented Staff

- PROFESSIONAL, OTHER SALARIES – NON-LICENSED: (e.g., Analysts, Project Managers, HR, IT, Communications, Financial Services, Facilities, Nutrition, and Legal Support)

511310 Administrators - Licensed

- SUPERINTENDENT
- DEPUTY SUPERINTENDENTS
- SENIOR DIRECTORS / AREA DIRECTORS
- ADMINISTRATORS – LICENSED. Includes licensed administrators and departmental directors.
- ASSISTANT DIRECTORS / SUPERVISORS / MANAGERS – LICENSED. Includes licensed assistant directors, project/program administrators, directors, managers, and supervisors.
- PRINCIPALS and administrative or supervisory substitutes defined in the PAT (Portland Association of Teachers) agreement.
- VICE PRINCIPALS / ASSISTANT VICE PRINCIPALS / ASSISTANT PRINCIPALS

511320 Administrators - Non Licensed

- ADMINISTRATORS – NON-LICENSED. Includes Cabinet level administrators who oversee multiple departments and other district operations.

511410 Managerial - Represented

- CAFETERIA MANAGERS (This object is used only by food service programs in Fund 202 and in Grants.)

511420 Directors / Program Administrators

- NON-LICENSED DIRECTORS / ASSISTANT DIRECTORS / SUPERVISORS / MANAGERS

Non-Permanent Salaries - Full-time, part time, and prorated portions of the costs for work performed by employees of the District who are hired on a temporary or substitute basis to perform work in positions in either temporary or permanent nature.

512100 Substitutes - Licensed

- TEACHER SUBSTITUTES – LICENSED. Substitutes for professional educators' in object 511100.
- PAT – PROFESSIONAL/CONFERENCE LEAVES. Substitutes for professional educators attending seminars, meetings, or conferences that fall within the guidelines of the PAT Agreement.
- PAT – SABBATICAL LEAVES. Compensation paid to professional educators on approved sabbatical leaves (time document not required; changes made directly by Human Resources Department).

512200 Substitute - Classified

- EDUCATIONAL ASSISTANTS. Substitutes for positions listed in object 511210.
- SPECIAL ED PARAEDUCATORS. Substitutes for positions listed in object 511210.
- SECRETARIAL. Substitutes for positions listed in object 511210.
- CLERICAL. Substitutes for positions listed in object 511210.

512300 Temporary Miscellaneous - Licensed

- TEMPORARY WORKERS – LICENSED. Personnel required for specific jobs or to help in peak-load periods. Personnel are NOT permanent or regular part-time and are paid on an hourly basis.

512400 Temporary Miscellaneous - Classified

- TEMPORARY WORKERS – NON-LICENSED. Personnel required for specific jobs or to help in peak-load periods. Personnel are NOT permanent or regular part-time and are paid on an hourly basis. (Object 538900 used for contracted secretarial/clerical services.)
- STUDENT WORKERS.

Additional Salary - Compensation paid to District employees in temporary or permanent positions for work performed in addition to normal earnings. This includes additional pay for classified overtime, extended hours for licensed staff, and activities such as coaching, supervision of extracurricular activities, etc.

513100 Extended Responsibility (ER) - Licensed

- Compensation to licensed staff for positions listed in the PAT Union Agreement, Appendix B.

513200 Extended Responsibility (ER) - Classified

- Compensation to classified staff performing ER responsibilities when no certificated employee is willing to accept assignment listed in Appendix B of the PAT Union Agreement.

513300 Extended Hours

- Compensation to District personnel at their hourly rate for services performed on curriculum development committees, workshops for instructional staff, teaching in-service classes, after-hour meetings, etc.

513350 PAT Class Overload Stipend

- Stipends paid to teachers who have class sizes that exceed the established thresholds of student numbers.

513390 Vacancy Underspend – Budgetary

- Vacancy Underspend - for use by Budget Office only

513400 Overtime Pay

- Compensation to non-certificated District personnel for authorized time in excess of regular hours.
- SPORTING EVENT SUPPORT PERSONNEL. Compensation for District staff that perform jobs such as gatekeepers, game officials, ticket takers, and security officers. (Object 531900 used for Game Expenses for non-district personnel.)

513510 Group Health Opt Out - Licensed Employees

- Monthly incentive for full-time employees opting out of Group Health Insurance.

513520 Group Health Opt Out - Classified Employees

- Monthly incentive for full-time employees opting out of Group Health Insurance.

520000 - Associated Payroll Costs

Amounts paid by the District on behalf of employees. These amounts are not included in the gross salary but are in addition to that amount and, while not paid directly to employees, are part of the cost of personnel services.

521000 PERS

- RETIREMENT CONTRIBUTIONS. Employer's share of the Public Employees Retirement System (PERS) contributions paid by the District.

521310 PERS UAL

- Unfunded Actuarial Liability amount of PERS.

522000 Social Security - FICA

- Employer's share of social security taxes paid by the District as required by the Federal Insurance Contributions Act (FICA).

523100 Workers' Compensation

- Amounts paid by the District to provide workers' compensation insurance for employees.

523200 Unemployment Compensation

- Amounts paid by the District to provide unemployment compensation for employees.

523300 Paid Family Medical Leave

- Amounts paid by the District to provide Paid Leave Oregon program benefits for employees.

Contractual Employee Benefits - Amounts paid by the District resulting from negotiated agreement between the Board and the employee groups.

524100 Group Health Insurance

- Employees' and employer's share of health insurance plan contributions paid by the District.

524200 Other Employer Paid Benefits

- Amounts paid by the District to provide life insurance coverage for eligible employees.

524300 Retiree Health Insurance

- Amounts paid by the District to cover retired employees eligible under the plan.

524400 DCU Union Contract Items

- PROFESSIONAL CONFERENCES – District Council of Unions (DCU) UNION ARTICLE. Travel costs such as lodging, meals, registration, and travel incurred by employees while attending approved conferences, seminars, and workshops related to the employee's work assignment. Membership dues are not to be charged to this object; refer to object 564000.

524500 PAT Union Contract Items

- PERSONAL (OWNED) AUTO DAMAGE. Compensation paid to professional educators who sustain personal (owned) automobile damage caused by an accident while the employee is in the course and scope of District employment.
- PERSONAL PROPERTY LOSS. Compensation made to professional educators when clothing or other personal property, excluding automobile, is damaged or destroyed as the result of any unwarranted assault on the teacher's person suffered during the course of employment.

524510 PAT Union Tuition Reimbursement

- PAT UNION AGREEMENT - Payments made to employees for tuition reimbursement.

524520 PAT Union Professional Growth Funds

- PROFESSIONAL CONFERENCES - PAT UNION AGREEMENT. Payments for costs such as lodging, meals, registration, and transportation incurred by a professional educator while attending approved professional conferences offered by PAT Union Agreement. The conferences, meetings, workshops, etc., can be either in or out of District. (Object 564000 used for dues or membership fees.)

524530 Early Retirement Benefits

- Amounts paid by the District to retired certificated employees eligible under the plan.

524600 PFSP District Inservice

- Inservice events for Portland Federation of School Professionals (PFSP) professional development and staff training.

530000 - Purchased Services

Services which, by their nature, can be performed only by persons or firms with specialized skills and knowledge who are not employees of the District.

Instructional, Professional, and Technical Services - Services in support of the instructional program and its administration. Included would be curriculum improvement services, counseling and guidance services, library and media support, and contracted instructional services.

531100 Instructional Services

- Non-payroll services performed by qualified persons or organizations providing one or more of the following: learning experiences for students, assistance to teachers and supervisors in enhancing the quality of the teaching process, student and parent solving problems to supplement the teaching process.

531200 Instructional Program Improvement Services

- Non-payroll services performed by persons qualified to assist teachers and supervisors in enhancing the quality of the teaching process. Includes curriculum consultants, in-service training specialists, etc.

531300 Student Services

- Non-payroll services of qualified personnel to assist students and their parents in solving mental and physical problems to supplement the teaching process.

531800 Local Meetings / Non-Instructional Staff Development

- Training fees for workshops, conferences, seminars and other staff development activities attended by non-instructional personnel excluding travel related costs. This includes meals or refreshments for training events and working business meetings.

531810 Non-Instructional Development - Professional Development Funds

- Fees for training workshops, conferences, seminars and other staff development activities using allocated Professional Development funding by licensed employees.

531900 Other Instructional, Professional, and Technical Services

- PERSONAL/PROFESSIONAL SERVICES. Personal/professional service contracts for instructional related services such as educational studies and consultant service contracts for instructional programs.
- GAME EXPENSES. Non-payroll services provided by non-District personnel for security, game officials, ticket takers, labor to line fields, facilities rental, etc.
- SERVICES PURCHASED FROM ANOTHER SCHOOL DISTRICT WITHIN THE STATE. Payments to another school district within the state for services rendered, other than tuition and transportation fees. Examples of services are data processing, purchasing, nursing, and guidance.

532100 Cleaning Services

- Services purchased to clean buildings or equipment other than those provided by District employees.

532200 Repairs and Maintenance Services

- CONTRACTED RENOVATION/REMODELING. Contractor costs for the renovation and remodeling of existing structures.

532400 Rentals

- RENTAL OF LAND AND BUILDINGS. Rentals for both temporary and long-range use. Some examples are administrative offices, garages, warehouse space, auditorium facilities, parking lots, classroom space, and playground space.
- RENTAL OF EQUIPMENT AND VEHICLES. Rentals for both temporary and long-range use. This includes bus and other vehicle rentals when operated by the District, and similar rental agreements such as for cable systems. Under such arrangements, ownership of the asset (i.e. equipment or vehicle) DOES NOT revert to the District at the end of the agreement.
- LEASE-PURCHASE OF EQUIPMENT AND VEHICLES. Lease-purchase of equipment and vehicles where the ownership of the asset (i.e. equipment or vehicle) DOES revert to the District at the end of the lease-purchase agreement.

Energy/Utility Services **-** Expenditures for energy, such as natural gas, oil, gasoline, and expenditures for utility services supplied by public or private organizations.

532500 Electricity

532600 Fuel

- NATURAL GAS
- OIL FOR HEATING

532700 Water and Sewage

532800 Garbage

- DISPOSAL SERVICES. Pickup and handling of garbage by non-District employees.

532900 Other Property Services

- CONTRACTED BUILDING UPKEEP. Non-payroll services provided by outside vendors for repairs and maintenance of buildings.
- CONTRACTED EQUIPMENT SERVICES. Non-payroll services provided by outside vendors for repairs and maintenance of instructional and non-instructional equipment.
- TRANSPORTATION EQUIPMENT UPKEEP. Non-payroll services provided by outside vendors for repairs and maintenance of District buses.

Student Transportation Services - Contracted costs incurred in transporting students to and from instructional programs during the school term including District expenditures associated with: (a) Home-to-school transportation of students as scheduled by the local school board; (b) Student transportation between educational facilities either within or across district boundaries, if the facilities are used as part of the regularly scheduled instructional program approved by the board; (c) Student transportation for in-state field trips when such represents an extension of classroom activities for instructional purposes, and shall include out-of-state destinations within 50 miles of the Oregon border.

533110 Reimbursable - School Bus

533120 Reimbursable - Taxi Cab

533130 Reimbursable - In-Lieu

533140 Reimbursable - Tri-Met

533150 Reimbursable - Field Trips

533160 Reimbursable - Athletic Trips

533200 Non-Reimbursable Student Transportation

- Includes transportation costs for field trips not allowed for reimbursement by the state. Includes contract payments for transporting students on student activity trips, interscholastic athletic events, out-of-state field trips, or non-instructional field trips.

Travel - Expenditures for transportation, meals, hotels, and other travel related expenses for District related business.

534100 Travel, Local in District

- LOCAL TRAVEL AND MILEAGE. Reimbursement for mileage incurred within the 25-mile limitation by a District employee when conducting District business. Includes parking fees and taxi fares within the confines of the District.

534200 Travel, Out of District

- OUT-OF-TOWN TRAVEL. Payments for employee travel costs such as lodging, meals, and transportation incurred outside the 25-mile limitation when conducting District business, such as attending conferences and meetings. (Object 531800 used for registration costs of workshops and seminars for training purposes. Object 524500 used for conferences covered by PAT Union Agreement. Object 564000 used for dues and membership fees).

534210 Travel, Out of District - Professional Development Funds

- Employee travel costs such as lodging, meals, and transportation incurred outside the 25-mile limitation when attending training or workshops using allocated Professional Development funding by licensed employees.

534300 Travel, Student Activities

- STUDENT ACTIVITY EXPENSES. Student activities such as conferences, workshops, registration fees, entry fees, performance tickets, lodging and meals. (Object 533200 used for Non-Instructional transportation expenses related to these activities.)

534900 Other Travel

- INTERVIEW EXPENSE. Travel costs such as lodging, meals, and transportation incurred by a prospective employee for the District. Advance permission to use this object must be obtained from the Human Resources Department.

534901 Non-Reimbursable Student Academic Transportation

- Student bus passes / tickets provided for travel to and from school.

Communication **-** Services provided by persons or businesses to assist in transmitting and receiving messages or information. This category includes internet, telephone and fax services, as well as postage and postage machine rental.

535100 Telephone

- Telephone services, cellular phones, toll charges, etc.

535300 Postage

- Postage stamps, postage machine rentals, etc.

535400 Advertising

- Printed announcements in professional periodicals and newspapers or announcements broadcast by way of radio and television networks. These expenditures include advertising for such purposes as personnel recruitment, legal requirements, and the sale of property.

535500 Printing and Binding

- Printing/copying/binding of forms, posters, publications, etc. Includes costs of leased copier machines used at schools and District sites.

535910 Fax

- Facsimile machine rental/use charges.

535920 Internet Fees

- 535990 Wide Area Network / Misc.

Charter School Payments - Expenditures to reimburse Charter Schools for instructional services rendered to students residing in the legal boundaries of the District.

536000 Charter Schools

Tuition - Expenditures to reimburse other educational agencies for instructional services rendered to students residing in the legal boundaries of the District.

537100 Tuition Payments to Other Districts In State

537300 Tuition Payments to Private Schools

537410 Tuition Fees for College Credit

Non-Instructional Professional and Technical Services - Services which by their nature can be performed only by persons with specialized skills and knowledge.

538100 Audit Services

- Fees paid to independent auditors, fees paid to actuaries, audit filing fees paid to the Secretary of State, and related costs.

538200 Legal Services

- Services of outside legal counsel.

538300 Architect and Engineering Services

- Expenditures for professional services of licensed professionals for consultation regarding the District's facilities.

538400 Negotiation Services

- Expenditures for services performed in negotiating contracts with any labor group.

538500 Management Services

- Services performed by persons qualified to assist management in policy matters or the general operation of the District. Includes consultant services, accounting and financial advisors, individually or as a team, to assist management in performing systematic studies and other services to enhance District effectiveness.

538600 Data Processing Services

- Non-payroll services performed by persons, organizations, or other agencies qualified to process data. This includes data processing organizations contracted to perform a specific task on a short-term basis.

538800 Election Services

- Ballots, poll books, and publications of official notices.

Other Non-Instructional Professional and Technological Services - Includes other professional and technical services that require specialized knowledge and skills.

538910 Security Services

- Non-payroll security services such as armored car services and school registration security.

538920 Staff Services

- Non-payroll services performed by qualified persons to assist in employing and assigning staff, including specialists in personnel counseling and guidance. (Used only in Funds 202 and in Grants.)

538930 Secretarial/Clerical Services

- Non-payroll services performed by qualified persons or from temporary service organizations.

538940 Professional Moving Services

- Non-payroll services performed by qualified persons or organizations to move materials, furniture, etc.

538950 Professional Health Care Services

- Non-payroll dental, vision, and/or medical services, etc.

538960 Professional Child Care Services

- Non-payroll services performed by qualified persons, organizations, or other agencies to provide child care services.

538970 Graphic Arts Services

- Non-payroll services performed by persons, organizations, or other agencies qualified in any form of visual artistic representation including painting, drawing, photography, etc.

538980 Laundering Services

- Non-payroll services relating to cleaning and/or laundering.

538990 Non-Instructional Personal/Professional Services

- Non-payroll personal/professional service contracts, outside consultant service contracts, appraisal services, outside translation & interpretation services, etc., not listed elsewhere.

538992 Custodial Services Contract

538995 Meal Services

- NUTRITION SERVICES MEALS FOR HEAD START. (This object is only used by Grants.)

540000 - Supplies & Materials

Material and freight costs for items of an expendable nature that are consumed, wear out, deteriorate from use, or are used in fabrication or as components of more complex products.

541000 Consumable Supplies

- SUPPLIES. Purchases of general supplies needed for use in offices and classrooms such as pencils, pens, art supplies, pre-printed forms, paintbrushes, test tubes, computer cables, and other office supplies. Cafeteria supplies such as small utensils, aprons, straws, napkins. Custodial supplies such as brooms, mops, soap, and garden hoses. Maintenance Shop supplies such as flashlights, batteries, sandpaper, drill bits, and adhesive. Printing supplies such as paper, and ink. Miscellaneous items such as uniforms and costumes.
- CUSTODIAL NON-CLEANING SUPPLIES. Non-cleaning supplies such as floor finish, gum seal, hand soap, paint, paper towels, rock salt, toilet tissue, etc.
- AUDIOVISUAL SUPPLIES. Audiovisual, graphic, and photographic supplies, blank audio and visual tapes and discs, overhead transparency film, mounting tissue, laminating supplies, film processing, etc.

541100 Loss Prevention

Cafeteria Needs - Expenditures that support the various needs of the department of Nutrition Services (NS).

541210 Bakery Products - NS only

541220 Dairy Products - NS only

541230 Donated Commodities - NS only

541240 Fruits and Vegetables - NS only

541250 Meat - NS only

541260 Staples - NS only

541270 Food Inventory Adjustment - NS only

Other Consumable Supplies - Expenditures that support the various needs of the District.

541310 Auto Parts and Batteries

541315 Tires

541320 Oil and Lubricants

541325 Gas

541330 Propane

541400 Maintenance Materials

- Materials and supplies for the repair and maintenance of District buildings and equipment. (This object is only used by Facilities & Asset Management and Fund 601 Self-Insurance.)

541500 Inventory Adjustments

- Adjustments for overages (shortages) of warehouse supplies resulting from periodic inventory counts.

541600 Interdepartmental Charges

- Work order costs initiated and funded by departments and schools for minor improvement requests, such as installation of white boards, fixtures, internal material moves, etc.

541700 Discounts Taken

- Discounts received by the District for early payment of invoices.

Books and Periodicals - Expenditures for books, textbooks, and periodicals available for general use, including any reference books.

542100 Textbook Expansion

- Textbook purchases that are unique and outside the basic curriculum. Special one-time purchases to support expansion of classrooms, reconfiguration to K-8 schools, additional classrooms, individual school-based requirements, etc. Textbooks purchased against grants should be charged to this object.

542200 Textbook Adoption

542300 Textbook Replacement

- Purchase of textbooks damaged or lost to maintain the standard curriculum.

543000 Library Books

- LIBRARY AND REFERENCE BOOKS. Books for a new library or for materially expanding a present library, reference books for staff, repair of library books, etc.
- AUDIOVISUAL MEDIA. Motion pictures, recorded video and audio programs, charts, maps, rental of audiovisual materials, etc.

544000 Periodicals

- Subscriptions for any publications that appear at regular intervals, pamphlets, or newspapers.

544100 Online Periodical Subscriptions

- Subscriptions for any web-based or electronic publications used for instructional purposes.

Food (for Nutrition Services only) - Expenditures for food used in the school food service program. These objects are only used by Nutrition Services in Fund 202.

545100 Purchased Food - NS only

545200 Food Inventory Adjustments - NS only

- Adjustments for overages (shortages) of food inventory resulting from periodic inventory counts.

545210 Bakery Products - NS only

545220 Dairy Products - NS only

545240 Fruits and Vegetables - NS only

545250 Meat - NS only

545260 Nutritional Staples - NS only

545300 Donated Commodities - NS only

- Market value of food products received through the State from USDA (US Department of Agriculture).

Non-Consumable Supplies - Expenditures for items that are equipment, or are "equipment like," but which fail one or more of the tests for classification as Object 554100.

546000 Non-Consumable Supplies

- MINOR EQUIPMENT. Equipment items costing up to $4,999 not requiring asset tagging.

546100 Minor Equipment - Tagged

- MINOR EQUIPMENT. Equipment items costing up to $4,999 such as furniture, fixtures, VCRs, DVD players, projectors, televisions, camcorders, modems, cabling, etc., requiring tagging for asset control purposes.

547000 Computer Software

- Software program packages and site licenses, emulator boards, multi-protocol adapter boards, interface boards, font cartridges, etc.

548000 Computer Hardware

- Non-capital computer hardware such as desktops, laptops, iPads or Chromebooks, generally of value not meeting the capital expenditure criterion.

550000 - Capital Outlay

Expenditures for the acquisition of fixed assets, including land or existing buildings and improvements of grounds, construction of buildings, additions to buildings, initial equipment, additional equipment, and replacement of equipment.

551000 Land Acquisitions

- Land purchases; purchases of air rights, mineral rights, etc.

551100 Land Improvements

551200 Infrastructure

552000 Building Acquisitions and Improvements

- CONTRACTED BUILDING CONSTRUCTION. Contractor costs for new building construction and construction of additions to existing buildings.
- PURCHASE OF BUILDINGS.

553000 Improvements - Not Buildings

- Initial and additional improvement of sites, and adjacent ways after acquisition by the District. Consists of work as grading, landscaping, seeding, planting; new sidewalks, roadways, retaining walls, sewers and storm drains; installing hydrants; initial surfacing and soil treatment of athletic fields; furnishing and installing fixed playground apparatus, flagpoles, gateways, fences, demolition work and underground storage tanks which are not part of building service systems. Use objects 559000 or 567200 as appropriate for special assessments against the District for capital improvement such as streets, curbs, and drains.

553100 Leasehold Improvements

Depreciable Equipment **-** Expenditures for the initial, additional, and replacement items of equipment. An equipment item is a movable or fixed unit of furniture or furnishings, an instrument, a machine, an apparatus, or a set of articles that meets all of the following conditions:

1. It has an anticipated useful life of more than 1 year.
2. It is of significant value, measured as original cost or estimated market value of $5,000 or more.
3. It retains its original shape and appearance with use.
4. It is nonexpendable; that is, if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit.
5. It does not lose its identity through incorporation into a different or more complex unit or substance.

554100 Initial & Additional Equipment

- Any equipment purchase costing $5,000 or more such as machinery, furniture and fixtures, and vehicles (Object series 555000 used for technology related items.)

554110 Vehicles

- Automobiles, trucks, vans, etc.

Technology - Expenditures related to technology needs.

555010 Computers

- Capitol computer equipment and expenditures for computer hardware, related equipment, and other capital outlay for technology in excess of $5,000.

555020 Printers

555030 Software Capital Expense

- Purchase and upgrades of individual software programs in excess of $5,000.

555090 Miscellaneous Other Technology

- Technology equipment not categorized above in excess of $5,000.

Transportation – Expenditures for bus garages, buses, and capital bus improvements for student transportation.

556410 Buses/Capital Bus Improvements

Other Capital Outlay – Expenditures for all other Capital Outlay not classified above.

559000 Other Capital Outlay

- CAPITAL ASSESSMENTS. Assessments for capital improvements such as streets, curbs, and drains on District properties. This object is not to be used for any other purpose. (Object 567200 used for assessments charged by other governmental agencies to properties NOT adjacent to District properties.)

560000 - Other Objects

Amounts paid for goods and services not otherwise classified. This includes expenditures for the retirement of debt, the payment of interest on debt, and payment of dues and fees.

561000 Redemption of Principal

- Expenditures that are from current funds to retire bonds, and principal portion of contractual payments for capital acquisitions.

562000 Interest

- Interest expense on indebtedness. Expenditures from current funds for interest on serial bonds, short-term loans and interest included in contractual payments for capital acquisitions.

562100 Interest (Except Bus/Garage)

562200 Interest - Bus/Garage

563000 Fiscal Charges

- Bond trustee fees, bank service fees, check printing, deposit slips, deposit bags, etc.

563400 Bad Debt Expense

563500 Administrative Write-Off

- Used only by the Accounting Department.

564000 Dues and Fees

- Expenditures or assessments for membership in professional or other organizations or associations or payments to a paying agent for services rendered such as professional certifications, fingerprinting, miscellaneous fees, etc. (Do NOT include Internet fees, which should be charged to object 535920)

564010 Dues and Fees - Professional Development Funds

- Expenditures for membership in professional or other organizations or associations when using allocated Professional Development funding by Licensed Employees.

564100 Bond Issuance Cost

Insurance and Judgments

565100 Liability Insurance

- Premiums for insurance coverage against losses. (This object is only used by Fund 601 Self-Insurance.)

565200 Fidelity Bond Premiums

- Expenditures for bonds guaranteeing the District against losses resulting from the actions of the CFO, employees, or other persons of the District. Also recorded here are expenditures (not judgments) made in lieu of liability bonds.

565300 Property Insurance Premiums

- Premiums for insurance coverage on property against loss and damage. Charge to Program 25410 for buildings and Program 25510 for school buses. (This object is only used by Fund 601 Self-Insurance and Grant Funds.)

565350 Workers' Compensation Insurance Premiums

- Premiums for insurance coverage against Workers' Compensation claims.

565400 Student Insurance Premiums

- Expenditures for premiums on student accident insurance for students playing sports who are not covered by any other insurance program.

565500 Judgments and Settlements Against the District

- Expenditures from current funds for all judgments against the District that are not covered by liability insurance, but are of a type that might have been covered by insurance.

Other Insurance and Judgments

565910 Workers' Comp Claim Expense

- Compensation made on behalf of employees due to a work-related accident. (This object is only used by Fund 601 Self-Insurance.)

565920 Workers' Comp Assessment

- Assessment fees as established by the Workers' Compensation Board. (This object is used only by Fund 601 Self-Insurance.)

565930 Deductible Insurance Loss

- Costs resulting from automobile accidents, fire loss, building damage, etc., which are not reimbursable by insurance. Also recorded here are any expenditures made in lieu of liability insurance, and accident coverage. (This object is only used by Fund 601 Self-Insurance.)

565950 Unemployment Compensation Claim Expense

- Costs associated with unemployment claims

Taxes and Licenses

567100 Permits

- Permit costs for buildings, elevators, OSHA, FCC, etc.

567200 Public Assessments

- Property taxes and assessments charged by other governmental agencies for improvements to District properties or adjacent properties. (Use object 559000 for capital improvement assessments to District properties.)

568000 PERS UAL Lump Payment

- A one-time lump sum payment made to reduce the district's Unfunded Actuarial Liability (UAL) within the Public Employees Retirement System (PERS). This payment helps lower future contribution rates and overall pension liabilities.

569000 Grant Indirect Charges

- Covers administrative overhead expenses. (This object is only used by Grants.)

570000 - Transfers

571000 Transfers to Other Funds

- Transactions conveying money from one fund to another, generally in the form of payments from the General Fund to some other fund (used only with Budget Office approval).

572000 Pass-Through

- Record pass-through of federal monies to other entities. (This object is only used by Grants.)

Other Uses of Funds

581000 Operating Contingency

581100 Payments of Refunded Debt

581200 Discounts on Issuance of Long-Term Debt

DESCRIPTION OF FUNCTION CODES

10000 - Instruction

Activities dealing directly with the teaching of students, or the interaction between teacher and students. Included here are the activities of instructional assistants of any type that assist in the instructional process. Expenditures for teachers' travel within the District in connection with teaching assignments are considered costs of instruction.

10000 - Regular Programs - Instructional activities designed primarily to fully prepare students to make productive life decisions as community members, family members, and workers.

- 1000A - Instructional Substitutes
- 1000B - Unassigned Teachers
- 1000V - Instructional Vacancy Savings

11100 Elementary and K-8 School Instruction

- 11111 - Elementary Programs; Grades K-5
- 11112 - Elementary 1-5 Homeroom
- 11113 - Elementary Consolidated Budget; supplies, textbooks, extended hours, etc., in K-5 and K-8 schools
- 11119 - Kindergarten Homeroom
- 11131 - Elementary Extracurricular Activities; K-5 and K-8 schools

11200 Middle School Instruction

- 11211 - Middle School Program; Grades 6-8
- 11212 - Middle School Homeroom
- 11213 - Middle School Consolidated Budget; supplies, textbooks, extended hours, etc., in middle schools
- 11221 - Middle School Extracurricular Activities

11300 High School Instruction

- 11311 - High School Program; Grades 9-12
- 11312 - High School Homeroom
- 11313 - High School Consolidated Budget; supplies, textbooks, extended hours, etc., in high schools
- 11321 - High School Extracurricular Activities
- 11322 - Athletic Activities

11400 Pre-Kindergarten Programs

- 11401 - Early Childhood Education Centers (ECEC); programs for pre-kindergarten pupils in select schools
- 11402 - Head Start; Federal program that provides services to low-income pre-kindergarten pupils and their families

12000 - Special Programs - Instructional activities designed primarily to provide support for students with special needs.

12100 Programs for the Talented and Gifted

- 12100 - Talented and Gifted (TAG)

12200 Restrictive Programs for Students with Disabilities - Special learning experiences for students with disabilities who spend half or more of their time in a restricted setting. These learning experiences include, but are not limited to, such areas as Structured Learning Centers (SLC), Intensive Learning Centers (ILC), Developmental Kindergarten, Community Transition Centers (CTC), Life Skills with Nursing Services, Out-of-District programs, Home Instruction, Extended School Year programs, Diagnostic Classrooms, and Functional Living Skills.

- 12210 - Restrictive Programs
- 12211 - Functional Living Skills
- 12212 - Communication Behavior - Academic
- 12213 - Intensive Skills - Academic
- 12214 - Communication Behavior - Functional
- 12215 - SLC/ILC - Intensive Learning Center
- 12216 - Deaf/Hard of Hearing Classroom
- 12217 - Social Emotional - Behavior
- 12218 - Social Emotional - Intensive
- 12219 - Social Emotional - Fragile
- 12221 - SLC - Developmental Kindergarten
- 12230 - Life Skills/CTP
- 12241 - Intensive Skills - Functional
- 12251 - Direction Services
- 12253 - Out-of-District Programs
- 12261 - Home Instruction
- 12271 - Extended School Year
- 12282 - Behavior Intervention Classroom Diagnosis
- 12291 - Skilled Nursing Care Facilities
- 12292 - Assistive Technology Services
- 12293 - Other Individualized Instruction

12500 Less Restrictive Programs for Students with Disabilities - Special learning experiences for students with disabilities outside the regular classroom such as Resource Rooms where students with disabilities go during certain periods of the school day to receive remedial instruction in specific subject areas.

- 12501 - Resource Center Classrooms
- 12502 - Instructional Specialists
- 12503 - Individual Educational Assistants - General Ed Classroom
- 12504 - Deaf/Hard of Hearing
- 12505 - Vision Services
- 12506 - Interpreter Services
- 12507 - Behavior Program - Less Restrictive
- 12508 - Deaf/Blind Program
- 12509 - Orthopedic Services
- 12510 - Less Restrictive Programs
- 12511 - Deaf/Hard of Hearing Itinerant Services
- 12512 - Autism Services
- 12520 - Team-Communication Behavior

12600 Early Intervention - Services of treatment and habilitation designed to address a child's developmental deficits in sensory, motor, communication, self-help, and socialization areas.

- 12601 - SKIP Screening (Screening Kids for Intervention & Prevention) - Birth to Age 5
- 12602 - MESD Early Intervention Evaluations
- 12603 - Early Childhood Special Education (ECSE) Evaluations
- 12604 - Early Intervention/Early Childhood Special Ed (EI/ECSE)
- 12606 - Subcontractor Contracts
- 12607 - Portland Early Intervention Program (PEIP)
- 12609 - Albina Head Start
- 12613 - PEIP Peer Tuition

12700 Educationally Disadvantaged - Instructional activities designed for students who are disadvantaged due to socioeconomic status or other circumstances that can affect their educational opportunities.

- 12710 - Remediation
- 12711 - Academic Interventions
- 12720 - Title I: Federal program that provides additional support for schools that serve low-income students
- 12721 - Title I: Supplemental Educational Services; programs for students attending schools failing to meet Adequate Yearly Progress (AYP) as defined by the No Child Left Behind Act of 2001 (NCLB)
- 12722 - Title I: Teacher Professional Development
- 12723 - Title I: Human Resources Training on NCLB

- 12724 - Title I: Project Return Homeless; program designed to remove barriers to school enrollment and provide stability in school for students in homeless living situations
- 12725 - Title I: Summer School
- 12726 - Title I: School Choice Transportation
- 12727 - Title I: Performance Assistance
- 12728 - Title I: Accelerated Learning

12800 Alternative Education - Learning experiences for students who are at risk of dropping out of school, are not succeeding in a regular classroom setting, or may be more successful in a non-traditional setting.

- 12811 - Public Alternative Programs; programs provided by other public agencies
- 12821 - Community-Based Programs; programs provided by private agencies
- 12831 - Delayed Expulsion School Counseling Center (DESCC)
- 12832 - Classroom Alternative Education
- 12833 - Evening Programs
- 12835 - Indian Education
- 12870 - Targeted Transition
- 12872 - Transition Center
- 12880 - Charter Schools
- 12891 - Contract Programs
- 12892 - Alternative Education Instructional Support
- 12893 - CEIS (Coordinated Early Intervention Services)

12900 Designated Programs - Special learning experiences for other students with special needs, including English as a Second Language (ESL) and English Language Learner (ELL) students, teen parents and migrant education.

- 12910 - English as a Second Language Programs
- 12911 - ESL/Bilingual in K-5 and K-8 schools
- 12912 - ESL/Bilingual in middle schools
- 12913 - ESL/Bilingual in high schools
- 12914 - Bilingual Assessment Services
- 12921 - Parent Education/Pregnancy Prevention
- 12922 - Teen Parenting Services
- 12930 - Migrant Education
- 12991 - Private School Instruction; provided by District staff in area private schools
- 12992 - Section 504/Americans with Disabilities Act (ADA) Accommodation

14000 - Summer School Programs - Instructional activities as defined under 11000 Regular Programs carried on during the period between the end of the regular school term and the beginning of the next regular school term; this does not include the summer term of a 12-month school year.

- 14100 - Summer School, Elementary (grades K-5)
- 14200 - Summer School, Middle (grades 6-8)
- 14300 - Summer School, High (grades 9-12)

20000 - Support Services

Services which provide administrative, technical, personal (such as guidance and health), and logistical support to facilitate and enhance instruction.

21000 - Student Support Services - Activities designed to assess or improve the success and wellbeing of students and supplement instruction.

21100 Attendance and Social Work Services

- 21110 - Attendance/Social Work Services Area Direction
- 21120 - Attendance Services; assessment of attendance patterns and response to attendance problems
- 21130 - Social Work Services
- 21131 - Behavior Intervention
- 21141 - Special Education (SPED) Data Services
- 21150 - Student Safety (campus security agents, campus monitors, crossing guards, etc.)
- 21170 - Migrant Identification and Recruitment
- 21191 - Child Development Services
- 21192 - Student Discipline Services
- 21193 - Drug and Alcohol Services

21200 Guidance Services

- 21210 - Guidance Services Area Direction
- 21220 - Counseling Services
- 21221 - Counseling College Preparation
- 21240 - Student Guidance Information Services
- 21262 - Vocational Education Placement Services

21300 Health Services

- 21320 - Medical Services
- 21330 - Dental Services
- 21390 - Other Health Services

21400 Psychological Services

- 21400 - Psychological Services
- 21420 - Psychological Testing Services

21500 Speech Pathology and Audiology Services

- 21520 - Speech Pathology; identification and guidance of students with speech and language disorders
- 21530 - Audiology; identification and guidance of students with hearing loss
- 21580 - Access Services - Special Education (SPED) Technology
- 21590 - Other Speech Pathology and Audiology Services

21600 Other Student Treatment Services

- 21601 - Occupational Therapy
- 21602 - Physical Therapy
- 21603 - Adaptive Physical Education
- 21604 - Feeding Team - Training

21900 Student Support - Service Direction

- 21901 - Program Administration/Supervision
- 21902 - Administration
- 21903 - Collaborative Supports Team
- 21905 - Third Party Medical Reimbursement
- 21906 - IEP Writing/Meetings for Special Education Staff
- 21907 - IEP Writing/Meetings for General Education Staff
- 21908 - TAG Plan Writing

22000 - Instructional Staff Support Services - Activities associated with assisting instructional staff with the content and process of providing learning experiences for students.

22100 Improvement of Instruction Services

- 22110 - Improvement of Instruction Services Area Direction
- 22130 - Curriculum Development
- 22131 - Curriculum Development - K-5
- 22132 - Curriculum Development - 6-8
- 22133 - Curriculum Development - HS
- 22191 - Multicultural/Multiethnic Services
- 22192 - School Improvement Funds
- 22193 - School Improvement Plan (SIP) Development
- 22194 - Immersion Support & Administrative Services
- 22195 - Teaching Innovation Support

22200 Educational Media Services

- 22210 - Educational Media Services Area Direction
- 22220 - Library/Media Services
- 22230 - Multimedia Services
- 22240 - Educational Television Service
- 22251 - KBPS Programming and Production (KBPS is Benson High School's on-campus radio station)
- 22252 - KBPS Broadcasting
- 22253 - KBPS Program Information
- 22254 - KBPS Fundraising
- 22255 - KBPS Underwriting Grant Canvassing
- 22256 - KBPS Management and General Support
- 22257 - KBPS National Program Acquisition
- 22291 - Textbook Services
- 22292 - Classroom Technology Services
- 22293 - Curriculum Distribution

22300 Assessment and Testing

- 22301 - Assessment System Design
- 22302 - Measurement & Assessment
- 22304 - General Equivalency Diploma (GED) Assessment & Testing
- 22305 - Assessment Reporting

22400 Instructional Staff Development

- 22401 - Instructional Consultants
- 22402 - Instructional Specialists
- 22403 - Autistic Services
- 22410 - Instructional Staff Training Services
- 22411 - Instructional Staff Training - K-5
- 22412 - Instructional Staff Training - 6-8
- 22413 - Instructional Staff Training - HS
- 22420 - Portland Teacher Program; recruits/supports teacher candidates of color in their professional training
- 22430 - New Teacher Orientation
- 22440 - Occupational Therapists/Physical Therapists

23000 - General Administration Support Services* - Activities associated with the overall general administrative or executive responsibility for the entire District.

23100 Board of Education Services

23200 Executive Administration Services

- 23210 - Office of Superintendent
- 23211 - Executive Administration
- 23212 - Assistant Superintendent
- 23240 - State and Federal Relations
- 23291 - General Administration/Contracts
- 23292 - Legal Services
- 23293 - Operational Support Services
- 23294 - School Standards/Accreditation
- 23295 - Strategic Planning

24000 - School Administration - Activities associated with school direction and supervisory responsibility.

24100 Office of the Principal Services

- 24101 - School Administrative Services
- 24102 - School Curriculum Services
- 24103 - School Business Services

24900 Other School Administration Support

- 24901 - Graduation Services
- 24910 - Licensed Administrator Professional Development
- 24920 - School Closure

25000 - Business Support Services - Activities associated with the purchasing, paying for, transporting, exchanging, and maintaining goods and services for the District.

25100 Direction of Business Support Services*
25100 - Direction of Business Support

25200 Fiscal Services*

- 25210 - Direction of Fiscal Services
- 25220 - Budgeting Services
- 25231 - Funding Management Activities
- 25240 - Payroll Services
- 25250 - Financial Accounting Services

- 25260 - Internal Auditing Services
- 25270 - Property Accounting Services
- 25281 - Risk Management Service Area Direction
- 25282 - Employer-at-Injury Program (EAIP) Worksite Modifications
- 25283 - Liability Claims
- 25284 - Property/Fire Loss
- 25285 - Workers' Compensation
- 25286 - Worksite Safety
- 25287 - Mandated Health Services
- 25288 - Risk Control Initiatives
- 25291 - Enrollment Services
- 25292 - Family Support Centers

25400 Operation and Maintenance of Plant Services

- 25410 - Operation and Maintenance Services Area Direction
- 25411 - Project Management
- 25421 - Custodial Services
- 25422 - Environmental Health and Safety
- 25423 - Utilities Services
- 25424 - Property Management
- 25430 - Care and Upkeep of Grounds
- 25441 - Maintenance Workforce
- 25442 - Other Funded work
- 25443 - Vehicle Operation/Maintenance
- 25444 - Multicraft Services
- 25445 - Electrical Services
- 25446 - Mechanical Services
- 25460 - Security Services
- 25490 - Other Operations and Maintenance

25500 Student Transportation Services

- 25510 - Transportation Administration
- 25520 - Transportation Operations
- 25530 - Transportation Fleet Maintenance
- 25540 - Transportation Routing Services
- 25550 - Transportation Safety and Training
- 25580 - Special Education Transportation Services

25700 Internal Services

- 25710 - Internal Services Area Direction
- 25720 - Purchasing Services
- 25730 - Warehousing/Distribution Services
- 25740 - Printing, Publishing and Duplicating Services
- 25790 - Other Internal Services

26000 - Central Support Services* - Activities that support each of the other instructional and supporting service programs.

26200 Planning, Research, Development, Evaluation, Grant Writing and Statistical Services*

- 26210 - Service Area Direction
- 26211 - Evaluation Services Direction
- 26212 - Grant Writing Direction
- 26220 - Development Services
- 26230 - Evaluation Services
- 26240 - Planning Services
- 26250 - Research Services
- 26260 - Grant Writing Services
- 26270 - Statistical Services
- 26271 - Accountability & Reporting

26300 Communication Services*

- 26320 - Internal Information Services
- 26330 - Public Information Services
- 26331 - Volunteer Activities and Recognition
- 26340 - Management Information Services
- 26350 - Translation Services

26400 Staff Services*

- 26410 - Staff Services Area Direction
- 26420 - Recruitment and Placement Services
- 26430 - Staff Accounting Services
- 26440 - Health Reimbursement Arrangement (HRA) Benefits Program
- 26491 - Staff Services
- 26492 - Non-Instructional Staff Development
- 26493 - Staff Relations and Negotiations

26600 Technology Services

- 26610 - IT Service Area Direction
- 26611 - IT Project Management
- 26620 - Systems Analysis Services
- 26631 - Student Information Systems
- 26632 - Business Information Systems
- 26634 - Web Information Systems
- 26635 - Systems Development and Integration
- 26641 - Technical Operations
- 26642 - Information Security
- 26643 - Client Services and Collaboration
- 26691 - Central Telecommunication Services
- 26696 - School Hardware Modernization
- 26697 - Technical Training Services
- 26698 - Infrastructure Development
- 26699 - Systems Development

26700 Records Management Services*

- 26700 - Records Management Services

26900 Other Support Services – Central

- 26901 - District Equity
- 26902 - Partnership Development
- 2000V - Support Services Vacancy Savings

30000 - Enterprise and Community Services

Enterprise services are activities financed and operated similarly to private business enterprises, providing goods and services to students or the general public and financed primarily through user fees or community programs. Community services are activities which are not directly related to the provision of education for pupils in the District. These include services such as community recreation programs, civic activities, public libraries, programs of custody and care of children, and community welfare activities provided by the District for the community as a whole or in part.

31000 Food Services - Activities concerned with providing food to students and staff in the District.

- 31100 - Food Services Administration
- 31200 - Food Preparation and Service
- 31220 - BESC Deli
- 31230 - Fresh Fruit & Vegetable Program
- 31300 - Food Delivery Services
- 31900 - Nutrition Education/Other
- 31910 - Summer Nutrition

33000 Community Services - Activities which are not directly related to the provision of education to pupils.

40000 - Facilities Acquisition and Construction

Activities associated with the acquisition of land and buildings, major remodeling and construction of buildings and major additions to buildings, initial installation or extension of service systems and other built-in equipment, and major improvements to sites.

- 41100 - Service Area Direction
- 41200 - Site Acquisition and Development
- 41500 - Building Acquisition, Construction, and Improvement Services
- 41905 - Capital Bond Planning
- 41910 - Relocation Projects

50000 - Other Uses

Activities included in this category are servicing the debt of the District, conduit-type transfers from one fund to another fund, and apportionment of funds by the Educational Service District (ESD).

- 51100 - Long-Term Debt Service
- 51200 - Short-Term Debt Retirement
- 52100 - Fund Transfers
- 54100 - PERS Unfunded Actuarial Liability (UAL)

60000 - Contingencies

Expenditures which cannot be foreseen and planned in the budget process.

- 61100 - Operating Contingency

70000 - Unappropriated Ending Fund Balance

An estimate of funds needed to maintain operations of the 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.

- 71100 - Ending Fund Balance

*Denotes a function code identified by Oregon Department of Revenue to be Central Office department activities.



Ida B. Wells High School - PIL Football Ida B. Wells vs McDaniel, September 19, 2025



Franklin High School - First Day of School, August 27, 2025


PPS



PORTLAND PUBLIC SCHOOLS

2026-27 PROPOSED BUDGET

VOLUME #2

FISCAL YEAR JULY 1, 2026 - JUNE 30, 2027

Portland Public Schools
School District No . 1J,
Multnomah County, Oregon

www.pps.net

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Portland Public Schools Nondiscrimination / Anti-Harassment Statement

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Board of Education Policy
1.80.020-P



Kelly Elementary School - Leap and Summer Programs, July 2025



Franklin High School - First Day of School, August 27, 2025

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INDIVIDUAL SCHOOL REPORTS

Portland Public Schools provides transparency around how resources are allocated to schools through the individual school reports. Starting in 2019-20 these reports have been provided as part of the annual budget documents. Quality information is a prerequisite for sound data-based decisions. This update has been released so that decision-makers and the public have the information to better understand our individual schools during the current budget process.

The following pages have a summary report (Heat Map) comparing all schools and then a report for each individual school which summarizes numerous staff FTE, financial and student data points over the past three to five years and where available, the projected and budgeted data. The sections outlined below are in order as they appear on each school's report.

Heat Map

The heat map shows all schools with the state assessment data, ratio of FTE per student, and the cost per student along with information about the schools. Foundation dollars have not been allowed to fund FTE last year or for the upcoming year, but are still included in previous years. This is similar to the Elementary and Secondary School Emergency Relief Fund (ESSER) grant funds during COVID. They were were used to support FTE in schools. The last year of ESSER funding was 2023-24. The darker the green in the Students per FTE and in Dollars per Student columns, the higher resourced the school is on a per-student basis.

Enrollment Data

The enrollment data reflects five years of actual enrollment at the school as of October 1st of each year. Additionally, three years of projected enrollment are provided. The first year of the projected enrollment will be used for the budgeted year of school staffing FTE allocations.

If the school has a co-located program, the enrollment data is displayed separately for the neighborhood versus the immersion program.

School Staff

The school staffing data is broken into multiple sections to provide different insights. There are five years of actual staff FTE listed and the budgeted year of staff FTE.

School Allocated FTE by Position

These are the FTE that are allocated directly to the school, as part of school staffing, based on the projected enrollment and staffing thresholds for the year. See the school staffing explanation in the Informational Section of Volume 1 of the PPS Volume 1 budget document for more information about the FTE allocated directly to schools.

Centrally Allocated FTE by Position (CASR)

These are the FTEs that are not allocated directly to the school, but are a central resource that are allocated by the central department. Special Education and ESL FTEs are allocated based on students' needs at each school. See the school staffing explanation in the Informational Section of Volume 1 of the PPS Volume 1 budget document for more information about the Special Education and ESL staffing. The City Arts Tax funds kindergarten through fifth grade art at a ratio of 500:1, but PPS supplements the funding at a higher ratio and schools can use other funds/dollars to increase art FTE.

Overall Students per FTE
The total enrollment is divided by the total FTE to show how many students per FTE are in the school each year. The school allocated and centrally allocated FTE are both used in the equation. A smaller ratio means there are more staffing resources per student.

School Allocated FTE by Funding Source (not CASR)
This a different view of the FTE allocated directly to the school, as it shows the funding source for the FTE. The funding sources available to each school varies, and this presents a more complete picture of how all of the FTE are funded at the school.

Since the Student Investment Act (SIA) and Measure 98 are both Oregon specific investments that fund large amounts of FTE, Measure 98 are combined with SIA in the SIA/M98 row.

During and following the COVID pandemic, Elementary and Secondary School Emergency Relief Fund (ESSER) grant funds were used to support FTE in schools, which is in shown in the Other line. The last year of ESSER funding was 2023-24.

School Financial Data

The school financial data shows four years of actual financial data along with the projected budget.

Dollars per Student
The total dollars are divided by the total enrollment to show how many dollars per student are allocated to the school each year. The centrally allocated FTE are not included in the total dollars for this equation.

Demographic Data

The actual student demographic data are displayed for the current year and past four years. The demographic data displayed are some of the data points that are factored into school staffing (Federally Qualified Underserved and Free-Direct Certification).

Federally Qualified Underserved is the percentage of students who are identified as at least one of the groups considered Underserved which include students identified as:

- Special Education Eligibility
- Limited English Proficiency
- Free meal eligibility by Direct Certification (see below for definition)

Free-Direct Certification is a proxy measure to determine economic disadvantage. Direct Certification is based on income level or a categorical reason such as participation in the Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF), Migrant Ed, McKinney Vento, or foster care. Starting in 2023, Medicaid was added as another way for families to qualify for free or reduced priced meals in Oregon. Students who qualify for free meals via Medicaid are counted as Direct Certification.

Free Meal by Direct Certification is the only comparable measure of economic hardship across all schools.

The races that are also displayed to give a complete picture of the race/ethnicity make-up of the students at the school.

Student Performance Data

Three years of the student performance data are usually displayed for Math and English Language Arts. However, due to the COVID pandemic, the statewide assessments were halted and performance data are unavailable for 2019-20 and 2020-21. The participation rate is displayed along with the percentage of students scoring at each level for each test. The graph represents the percentage of students scoring a Level 3 or 4 on the assessments (above 0%) and the percentage scoring a Level 1 or 2 (below 0%). 0% represents the base level to be college or career ready.

Four Year Cohort Graduation Rate

Multiple years of the four-year cohort graduation rates are listed for each of the high schools. This is the graduation rate for students who graduated from high school within four years of starting high school (on-time). The latest available data is displayed.

Schools in Need of Additional Supports

If a school is identified as a school in need of additional supports, there will be a note(s) in the upper right-hand corner indicating which group of additional supports the school falls under. The groups include Title I, CSI, and TSI, and reflect the most current data available.

Title IA Allocations

The Federal Title IA grant funds provide additional FTE for both certified and classified staff in the schools. Most of the Title IA funds received by the District are allocated directly to elementary, middle, and K-8 schools where at least 33% of the students would qualify for free meals through Direct Certification. High Schools receive Title IA funding if they are identified as "High Poverty", which is equivalent to 46.9% of students who qualify for free meals through Direct Certification. The funds are targeted to support students from low income families. Dollars are allocated per qualifying student.

The formula example for grades K-8 is Total Allocation ÷ Total Low-Income Student Count = Base Per-Student Rate. The base per-student rate is then multiplied by 1.25 to comply with the 125% rule. PPS is obligated to adhere to this rule because PPS chooses to fund schools with a poverty rate of 33%. The threshold established under the Elementary and Secondary Education Act (ESEA) is 35%. The adjusted per-student rate is multiplied by the number of eligible students at each school to determine the school's Title I school-based allocation.

Remaining Title IA funds are allocated centrally and most notably funds our McKinney-Vento Homeless supports.

Title I Bridging Process

PPS developed a lower per-pupil rate of $603 for recently exited Title I schools. This rate was then applied to each school's eligible DC student count to calculate final school-level allocations. Although bridge schools are no longer designated as Title I, they are still required to use Title I Schoolwide Allocations and the Family Engagement set-aside in the same manner as Title I schools.

ESSA Partnership Funds for CSI and TSI Schools

Schools identified for CSI or TSI support will receive Federal School Improvement Funds to Support CSI and TSI Schools. CSI/TSI schools will be provided an individual school allocation calculated using ODE's methodology. Recipients are expected to use these funds to enhance school-level activities to support focal students and continuous improvement efforts informed by comprehensive data analysis and ongoing community engagement.

Achievement, Students per FTE and Dollars-per-student, by School

Sorted by grade band and 2026-27 $ per student

	% Proficient on State Exams		Students per FTE School General Fund, Title I, Foundation, Grants, **including** Special Education, ESL, Nutrition Services, etc.					Dollars per Student School General Fund, Title I, Foundation, Grants; **excludes** Special Education, ESL, Nutrition Services, etc.						
School Name	**2024-25 Math**	**2024-25 English LA**	**2022-23 Students per FTE**	**2023-24 Students per FTE**	**2024-25 Students per FTE**	**2025-26 Students per FTE**	**2026-27 Students per FTE**	**2022-23 $ per Student**	**2023-24 $ per Student**	**2024-25 $ per Student**	**2025-26 $ per Student**	**2026-27 $ per Student**	**2024-25 Free Meals by DC%**	**2026-27 School Type (Programs), ODE status, and Title I**
K-5 SCHOOLS														
Rosa Parks	11%	17%	5.0	4.1	3.9	3.9	4.5	$16,885	$18,403	$18,113	$18,327	$16,805	79%	K-5 Title I
Woodmere	22%	28%	5.2	5.4	5.3	5.8	6.2	$13,797	$14,790	$15,516	$15,336	$14,754	59%	K-5 Title I
Whitman	21%	31%	5.7	6.2	4.9	4.7	4.9	$15,410	$14,489	$14,366	$14,329	$14,650	64%	K-5 Title I
Sitton	39%	40%	6.0	5.5	5.7	6.1	6.1	$11,503	$13,928	$13,049	$13,067	$13,636	60%	K-5 (Spanish Immersion) Title I
Marysville	26%	36%	5.6	5.7	6.0	6.9	7.0	$13,393	$13,737	$14,518	$12,859	$13,499	58%	K-5 TSI Title I
Lee	42%	47%	6.1	6.3	4.8	5.5	5.7	$11,036	$12,228	$13,794	$13,238	$13,472	45%	K-5 Title I
Boise-Eliot/Humboldt	15%	20%	5.2	5.4	5.8	5.7	6.1	$14,327	$13,578	$13,229	$14,090	$13,372	62%	K-5 TSI Title I
James John	23%	33%	5.9	6.5	7.7	7.5	8.0	$12,686	$13,446	$12,059	$12,705	$13,108	54%	K-5 (Spanish Immersion) Title I
Beach	50%	55%	9.3	8.0	7.8	9.0	8.7	$9,203	$10,476	$12,711	$12,123	$13,011	34%	K-5 (Spanish Immersion) Title I
Arleta	47%	47%	6.5	6.9	7.3	7.0	7.3	$10,516	$11,169	$12,002	$13,693	$12,903	24%	K-5 Title I
Grout	53%	56%	6.7	6.9	6.3	6.9	6.6	$11,033	$12,144	$12,785	$12,355	$12,871	51%	K-5 Title I
Clark	20%	23%		6.8	7.0	8.1	8.2		$13,584	$13,817	$13,065	$12,829	67%	K-5 Title I
Lent	37%	47%	4.6	5.8	6.0	6.6	7.1	$15,213	$14,005	$14,161	$13,468	$12,812	46%	K-5 (Spanish Immersion) Title I
Scott	37%	41%	6.7	7.4	7.9	8.5	8.5	$11,291	$11,623	$11,885	$11,879	$12,764	51%	K-5 (Spanish Immersion) Title I
Kelly	29%	30%	6.8	7.1	7.9	8.3	9.1	$12,569	$12,310	$12,334	$12,588	$12,271	67%	K-5 (Russian Immersion) Title I
MLK Jr	34%	39%	6.2	6.1	5.2	5.3	5.8	$14,736	$13,926	$12,980	$13,676	$12,265	51%	K-5 (Mandarin Immersion) Title I
Buckman	44%	54%	8.4	8.2	7.5	6.9	7.0	$9,358	$10,419	$11,350	$13,074	$12,261	36%	K-5 (Arts Focus) Title I
Abernethy	77%	82%	10.3	9.7	10.2	9.8	10.1	$9,445	$10,048	$10,813	$11,286	$12,126	11%	K-5
Vestal	31%	37%	5.1	4.7	6.3	7.0	7.1	$12,640	$14,121	$12,416	$12,132	$12,042	43%	K-5 Title I
Peninsula	37%	51%	5.3	5.7	5.5	5.7	6.6	$12,774	$12,729	$13,675	$13,776	$12,002	38%	K-5 Title I
Lewis	59%	66%	9.6	9.3	9.8	9.9	9.7	$9,109	$10,183	$10,673	$11,181	$11,836	22%	K-5
Rigler	36%	36%	5.7	6.5	7.7	7.5	8.8	$14,240	$13,681	$12,445	$13,783	$11,820	53%	K-5 (Spanish Immersion) Title I
Chapman	40%	46%	8.7	8.3	8.4	8.9	9.5	$10,715	$11,881	$11,335	$12,166	$11,779	52%	K-5 TSI Title I
Woodlawn	53%	52%	6.3	6.4	6.8	7.0	7.4	$11,567	$12,598	$12,121	$12,434	$11,743	44%	K-5 Title I
Rieke	83%	85%	11.6	11.0	11.6	11.5	11.6	$8,766	$10,277	$10,844	$11,357	$11,617	15%	K-5
Irvington	58%	66%	7.9	8.4	8.8	10.2	10.1	$11,936	$12,538	$11,753	$11,021	$11,609	20%	K-5
Woodstock	62%	64%	11.7	10.4	10.1	10.2	10.3	$8,755	$10,580	$11,638	$10,958	$11,492	23%	K-5 (Mandarin Immersion)
Creston	67%	66%	8.7	7.8	8.0	8.1	8.8	$10,183	$12,686	$12,955	$13,428	$11,467	23%	K-5
Maplewood	60%	62%	10.3	9.9	9.2	8.9	9.4	$9,141	$9,787	$10,204	$10,826	$11,280	19%	K-5
Chief Joseph	55%	63%	8.8	9.1	10.0	9.3	10.1	$10,851	$11,382	$11,034	$12,724	$11,188	22%	K-5
Rose City Park	56%	53%	10.2	10.0	10.9	11.1	11.3	$9,400	$9,920	$10,301	$11,106	$11,093	32%	K-5 (Vietnamese Immersion)
Markham	54%	61%	9.3	8.6	8.4	9.3	8.6	$8,414	$9,547	$10,607	$9,988	$11,053	38%	K-5 Title I
Atkinson	54%	61%	7.8	8.3	8.4	7.6	8.2	$9,480	$9,520	$9,911	$11,563	$10,949	32%	K-5 (Spanish Immersion) Title I
Glencoe	75%	79%	11.3	10.4	12.6	12.6	12.4	$8,617	$9,894	$10,096	$10,118	$10,907	17%	K-5
Sabin	57%	65%	7.4	6.8	7.4	7.4	8.0	$9,846	$10,739	$11,521	$11,552	$10,782	28%	K-5
Forest Park	78%	84%	10.7	11.1	10.9	11.3	12.0	$8,203	$9,467	$9,725	$11,047	$10,700	6%	K-5
Llewellyn	76%	77%	10.4	8.9	9.0	9.0	9.4	$7,906	$10,104	$9,890	$10,584	$10,690	13%	K-5
Stephenson	77%	78%	10.5	10.1	9.7	9.8	10.0	$8,229	$9,691	$9,522	$10,932	$10,586	9%	K-5
Hayhurst	55%	60%	8.6	8.4	7.8	7.9	8.3	$7,868	$9,615	$10,653	$10,596	$10,194	26%	K-5
Bridlemile	74%	78%	10.8	10.1	9.5	10.2	10.8	$7,314	$8,813	$9,457	$9,263	$9,667	13%	K-5
Capitol Hill	62%	68%	11.8	11.5	10.9	11.8	12.9	$8,439	$9,192	$10,575	$9,867	$9,643	18%	K-5
Ainsworth	76%	79%	12.0	12.1	11.8	12.0	13.4	$7,743	$8,498	$9,345	$9,754	$9,568	12%	K-5 (Spanish Immersion)
Duniway	72%	70%	11.1	11.2	11.9	12.3	13.5	$8,188	$9,124	$9,116	$9,826	$9,333	8%	K-5
Richmond	69%	74%	13.1	13.6	14.4	14.0	14.9	$7,688	$7,787	$8,146	$8,969	$8,755	6%	K-5 (Japanese Immersion)
Alameda	81%	84%	11.3	10.5	10.9	12.0	11.9	$7,680	$8,573	$8,738	$8,477	$8,639	6%	K-5

See Individual School Reports for more detail and context.

Achievement, Students per FTE and Dollars-per-student, by School

Sorted by grade band and 2026-27 $ per student

School Name	% Proficient on State Exams: 2024-25 Math	% Proficient on State Exams: 2024-25 English LA	Students per FTE (School General Fund, Title I, Foundation, Grants, including Special Education, ESL, Nutrition Services, etc.): 2022-23 Students per FTE	2023-24 Students per FTE	2024-25 Students per FTE	2025-26 Students per FTE	2026-27 Students per FTE	Dollars per Student (School General Fund, Title I, Foundation, Grants; excludes Special Education, ESL, Nutrition Services, etc.): 2022-23 $ per Student	2023-24 $ per Student	2024-25 $ per Student	2025-26 $ per Student	2026-27 $ per Student	2024-25 Free Meals by DC%	2026-27 School Type (Programs), ODE status, and Title I
K-8 SCHOOLS														
César Chávez	13%	21%	6.6	7.3	6.9	7.3	7.8	$12,938	$12,333	$13,919	$14,370	$14,443	65%	K-8 (Spanish Immersion) TSI Title I
Skyline	63%	75%	9.1	8.1	9.5	9.6	9.5	$10,643	$12,634	$11,380	$12,427	$12,962	13%	K-8
Faubion	17%	23%	6.3	6.1	5.1	5.6	5.5	$12,603	$13,010	$11,916	$12,593	$12,843	56%	K-8 CSI Title I
Astor	47%	55%	7.8	8.2	8.6	8.7	9.5	$10,953	$10,813	$10,254	$10,828	$11,438	29%	K-8
Odyssey	68%	73%	10.1	8.4	9.5	10.3	11.0	$9,538	$11,290	$11,031	$11,367	$11,198	7%	K-8
Beverly Cleary	71%	78%	11.8	11.1	11.9	11.0	10.5	$7,759	$9,060	$9,100	$10,097	$11,039	11%	K-8
Bridger Creative Science	43%	56%		9.2	11.2	10.8	11.4		$10,515	$10,148	$10,983	$10,939	27%	K-8
Access	92%	93%	11.0	10.6	11.2	11.9	12.1	$8,043	$9,865	$10,256	$10,646	$10,725	12%	1-8
Winterhaven	87%	88%	11.1	10.5	12.5	13.6	13.4	$8,616	$10,140	$9,963	$9,750	$10,653	18%	K-8 (STEM Focus)
Sunnyside Environmental	53%	61%	11.0	10.4	11.1	11.7	12.1	$9,067	$10,612	$10,249	$10,090	$10,462	18%	K-8 (Environmental Curriculum)
Vernon	54%	56%	11.8	11.5	11.5	11.8	12.9	$8,430	$9,614	$10,047	$10,741	$10,276	27%	K-8
Laurelhurst	69%	79%	13.0	12.3	12.9	13.5	13.7	$7,744	$9,027	$9,690	$9,920	$10,022	12%	K-8
MIDDLE SCHOOLS														
George	14%	25%	5.8	5.5	6.2	5.7	6.6	$12,198	$14,212	$13,171	$15,087	$13,290	70%	6-8 (Spanish Immersion) Title I
Lane	23%	30%	6.0	6.3	6.7	8.0	8.3	$12,348	$12,918	$13,821	$12,570	$12,281	57%	6-8 (Russian Immersion) Title I
Harrison Park	41%	49%	7.4	6.7	8.2	9.6	10.5	$10,814	$14,878	$14,054	$12,283	$12,078	46%	6-8 (Mandarin Immersion) Title I
Kellogg	35%	47%	8.1	8.9	7.8	8.8	9.3	$9,658	$9,912	$12,178	$12,266	$11,815	44%	6-8 (Spanish Immersion) Title I
Roseway Heights	28%	39%	8.4	8.2	9.1	8.9	10.1	$10,498	$11,893	$11,484	$12,608	$11,585	43%	6-8 (Spanish and Vietnamese Immersion) CSI Title I
Harriet Tubman	45%	47%	6.3	6.1	6.9	9.1	9.9	$13,113	$14,518	$15,028	$11,934	$11,475	37%	6-8 (Mandarin Immersion) Title I
Ockley Green	31%	35%	8.4	8.4	8.3	10.2	10.8	$9,234	$10,345	$12,127	$10,902	$11,318	35%	6-8 (Spanish Immersion) CSI Title I
Beaumont	61%	65%	7.3	7.3	8.0	8.2	8.5	$10,079	$11,102	$10,902	$11,015	$10,903	23%	6-8 (Spanish Immersion)
Mt Tabor	63%	68%	11.3	10.0	11.2	11.6	11.5	$8,423	$10,289	$10,049	$10,090	$10,440	16%	6-8 (Japanese Immersion)
Gray	57%	71%	11.7	10.5	10.7	11.4	11.4	$7,661	$9,136	$10,149	$10,083	$10,222	20%	6-8 TSI
da Vinci	33%	65%	11.0	9.2	10.4	11.1	11.8	$8,814	$10,633	$10,313	$9,997	$10,159	30%	6-8 (Arts Focus)
Hosford	51%	66%	11.6	10.2	10.8	10.9	11.4	$7,733	$9,193	$9,091	$9,568	$9,765	25%	6-8
Jackson	56%	67%	10.7	9.7	10.4	11.2	11.4	$7,170	$9,079	$8,970	$9,612	$9,561	22%	6-8 (Bernstein Artful Learning)
Sellwood	66%	71%	12.5	12.2	13.0	12.8	12.5	$7,577	$8,872	$8,982	$9,321	$9,552	12%	6-8
West Sylvan	63%	69%	12.5	11.4	11.6	12.6	12.6	$7,197	$8,280	$9,326	$8,862	$9,113	16%	6-8 (Spanish Immersion)
Metro. Learning Center	45%	58%	8.2	7.8	7.7	7.0	7.4	$11,796	$13,101	$14,232	$16,697	$17,163	21%	K-12 (Alternative Program)
HIGH SCHOOLS														
Alliance			4.2	4.3	5.0	5.8	6.5	$24,642	$26,611	$23,551	$22,064	$20,910	38%	9-12 (Alternative Program) CSI
Jefferson	15%	22%	6.4	5.6	5.8	5.4	6.0	$12,000	$14,860	$16,415	$18,918	$17,438	55%	9-12 (Middle College Program) CSI Title I
Roosevelt	9%	29%	9.0	8.8	9.1	9.0	9.1	$9,975	$10,638	$11,363	$12,141	$12,110	44%	9-12 (Advanced Placement, PSU Inquiry Partnership) CSI Title I
McDaniel	24%	38%	8.8	9.4	10.0	9.7	9.9	$10,102	$10,511	$10,659	$11,145	$11,450	41%	9-12 (Advanced Placement, AVID, STEM Programs)
Benson	25%	43%	7.8	8.1	9.0	9.8	11.1	$11,936	$12,255	$11,747	$11,181	$10,832	32%	9-12 (Professional, Technical, Health Occupations)
Franklin	17%	49%	11.1	10.5	11.0	11.1	11.1	$8,721	$9,841	$9,640	$9,945	$10,431	32%	9-12 (Advanced Placement, Dual-Credit Courses)
Cleveland	42%	67%	11.4	11.1	11.7	11.5	11.8	$8,765	$9,327	$9,418	$9,822	$9,846	17%	9-12 (International Baccalaureate) TSI
Lincoln	40%	70%	12.0	11.9	11.9	12.3	12.8	$8,963	$9,389	$9,749	$9,684	$9,491	11%	9-12 (International Baccalaureate)
Ida B. Wells-Barnett	30%	55%	11.5	11.6	12.1	11.3	11.9	$8,355	$8,891	$9,311	$9,773	$9,439	17%	9-12 (Advanced Placement, Computer Sciences) TSI
Grant	47%	71%	12.3	12.1	12.4	12.7	12.9	$7,709	$8,464	$8,881	$8,936	$9,062	13%	9-12 (Advanced Placement, Dual-Credit Courses)

See Individual School Reports for more detail and context.

Updated May 6, 2026 - Access and Alliance

Abernethy

2421 SE Orange Ave
503-916-6190

K-5 Constructed 1924

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	374	353	330	284	269	250	243	244
Total	**374**	**353**	**330**	**284**	**269**	**250**	**243**	**244**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	20.20	18.20	15.80	13.80	13.80	12.60
		Counseling Services	1.50	1.50	1.50	1.00	1.00	1.00
		Library/Media Services	0.80	0.80	0.50	0.50	0.50	0.40
		Instructional Spec/ Coach/ Intervention	0.50	0.50	1.00	1.00	1.00	1.00
		Other	1.00					
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator				0.75		0.40
		Library/Media Services			0.50			
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**26.50**	**23.50**	**21.80**	**19.55**	**18.80**	**17.90**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.50	2.50	3.00	1.00	1.00	1.00
		ESL	0.25	0.25	0.25			
		Other						
	Classified /Non-Rep	Special Education	3.75	2.81	2.81	2.81	3.75	2.81
		ESL						
		Nutrition Services	1.63	1.63	1.63	1.00	1.00	1.00
		Custodial	2.73	2.73	2.73	2.73	2.00	2.00
		Other	0.88	0.88	1.75	0.88	0.88	
CASR Total			**10.73**	**10.79**	**12.16**	**8.41**	**8.63**	**6.81**
Grand Total			**37.23**	**34.29**	**33.97**	**27.97**	**27.43**	**24.71**
Overall Students per FTE			10.0:1	10.3:1	9.7:1	10.2:1	9.8:1	10.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	19.00	16.95	16.80	14.40	14.50	13.20
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	0.50	0.80	0.80	0.80
		Foundation	0.50	0.50	0.62	0.10		
		Title I						
		SIA/M98	0.50	0.50	0.50	1.00	1.00	1.00
		Other	3.00	2.05	0.38			
	Classified/ Non-Rep	Gen Fund	1.50	1.50	2.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation				0.75		
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**26.50**	**23.50**	**21.80**	**19.55**	**18.80**	**17.90**

		2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School and CASR	**Licensed**	25.75	23.75	22.05	17.30	17.30	16.00
	Classified/ Non-Rep	10.48	9.54	10.92	9.67	9.13	7.71
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Abernethy

2421 SE Orange Ave
503-916-6190

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,387,088	$2,229,552	$2,175,467	$2,041,975	$1,959,197	$1,932,963
Associated Payroll Costs	$1,117,057	$1,045,641	$1,074,839	$ 985,884	$1,053,532	$1,075,655
Purchased Services	$ 11,992	$ 8,536	$ 19,999	$ 10,826	$ 11,484	$ 11,292
Supplies and Materials	$ 43,079	$ 50,230	$ 45,423	$ 32,074	$ 11,448	$ 11,256
Capital				$ 10		
Other Objects					$ 348	$ 336
Total	**$3,559,216**	**$3,333,958**	**$3,315,728**	**$3,070,770**	**$3,036,009**	**$3,031,502**
Dollars per Student	**$ 9,517 :1**	**$ 9,445 :1**	**$10,048 :1**	**$10,813 :1**	**$11,286 :1**	**$12,126 :1**

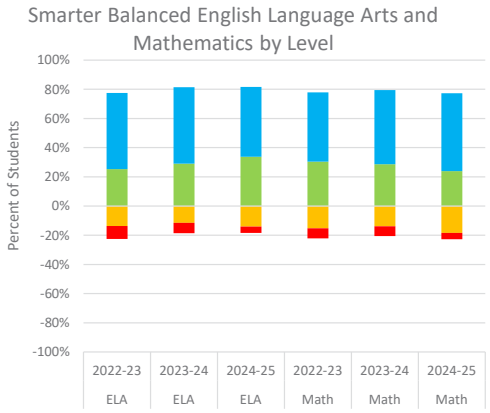
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	15%	17%	19%	20%	24%
*Students with Disabilities	14%	15%	19%	13%	14%
*English Language Learners	1%		1%	1%	1%
*Free-Direct Certification	8%	7%	13%	10%	11%
Black	1%	1%	1%	1%	1%
Latino	8%	7%	11%	9%	9%
Native American					0%
Pacific Islander	0%				
Multi-Race - Other Ancestry	3%	4%	4%	2%	4%
Multi-Race - Asian/White	5%	5%	6%	7%	7%
Asian	3%	3%	2%	2%	2%
White	80%	80%	77%	79%	76%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	52%	52%	48%
ELA	Level 3	25%	29%	34%
ELA	Level 2	14%	12%	14%
ELA	Level 1	9%	7%	4%
	ELA Participation	99%	100%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	47%	51%	53%
Math	Level 3	31%	29%	24%
Math	Level 2	15%	14%	18%
Math	Level 1	7%	7%	4%
	Math Participation	98%	97%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

ACCESS

6318 SW CORBETT AVE
503-916-6482

1-8 Constructed 1917

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	314	317	329	323	324	315	310	297
Total	**314**	**317**	**329**	**323**	**324**	**315**	**310**	**297**

Moved to Terwilliger 2022-23 SY.

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	17.00	16.00	16.50	16.90	16.90	15.70
		Counseling Services	2.50	1.50	2.00	1.80	1.00	1.00
		Library/Media Services	1.00	0.88	0.75	0.80	0.80	0.40
		Instructional Spec/ Coach/ Intervention	0.50		1.00	1.00	1.00	1.00
		Other	0.25					
	Classified /Non-Rep	Clerical	2.00	1.90	2.70	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator						0.40
		Library/Media Services			0.30			
		Other						
	Admin.		2.00	1.00	1.00	1.00	1.00	1.00
School Total			**25.25**	**21.28**	**24.25**	**23.00**	**22.20**	**21.00**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.00	1.80	2.00	1.00	1.00	1.00
		ESL						
		Other						
	Classified /Non-Rep	Special Education	1.88	1.88	1.88	1.88	0.94	0.94
		ESL						
		Nutrition Services		0.75	1.00	1.00	1.00	1.00
		Custodial		3.00	2.00	2.00	2.00	2.00
		Other						
CASR Total			**3.88**	**7.43**	**6.88**	**5.88**	**4.94**	**4.94**
Grand Total			**29.13**	**28.71**	**31.13**	**28.88**	**27.14**	**25.94**
Overall Students per FTE			10.8:1	11.0:1	10.6:1	11.2:1	11.9:1	12.1:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	20.00	16.25	18.25	17.90	18.10	16.70
		Gen Fund Equity						
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.40	0.60	0.40
		Foundation	0.13	0.13	0.50	1.20		
		Title I						
		SIA/M98	0.50	1.50	0.50	1.00	1.00	1.00
		Other	0.13		0.50			
	Classified/ Non-Rep	Gen Fund	2.00	1.70	2.70	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation		0.20	0.30			
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	2.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**25.25**	**21.28**	**24.25**	**23.00**	**22.20**	**21.00**

School and CASR	**Licensed**	23.25	20.18	22.25	21.50	20.70	19.10
	Classified/ Non-Rep	3.88	7.53	7.88	6.38	5.44	5.84
	Admin.	2.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

ACCESS

6318 SW CORBETT AVE
503-916-6482

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,056,010	$1,681,473	$2,120,785	$2,178,021	$2,214,175	$2,130,630
Associated Payroll Costs	$ 982,307	$ 845,312	$1,094,015	$1,107,434	$1,208,465	$1,210,845
Purchased Services	$ 6,605	$ 5,650	$ 8,800	$ 5,432	$ 13,188	$ 13,272
Supplies and Materials	$ 4,167	$ 17,255	$ 21,878	$ 21,715	$ 13,128	$ 23,236
Capital	$ 36		$ 140			
Other Objects	$ 175				$ 396	$ 396
Total	**$ 3,049,300**	**$ 2,549,690**	**$ 3,245,618**	**$ 3,312,602**	**$ 3,449,352**	**$ 3,378,379**
Dollars per Student	**$ 9,711 :1**	**$ 8,043 :1**	**$ 9,865 :1**	**$ 10,256 :1**	**$ 10,646 :1**	**$ 10,725 :1**

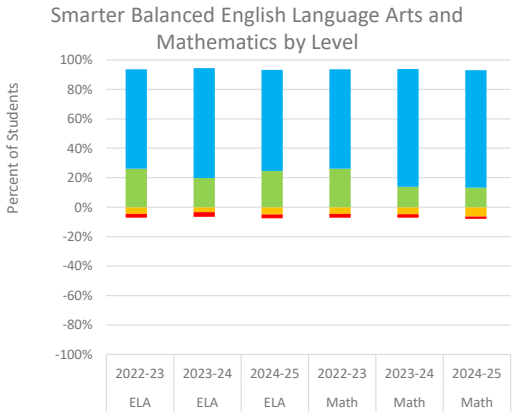
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	13%	12%	15%	18%	23%
*Students with Disabilities	16%	17%	17%	16%	12%
*English Language Learners					
*Free-Direct Certification	5%	4%	8%	10%	12%
Black	2%	2%	0%	0%	1%
Latino	5%	4%	5%	5%	8%
Native American					
Pacific Islander	1%	1%	1%	1%	1%
Multi-Race - Other Ancestry	3%	3%	4%	4%	3%
Multi-Race - Asian/White	11%	10%	10%	11%	11%
Asian	9%	6%	7%	6%	6%
White	70%	74%	73%	73%	70%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	67%	74%	68%
ELA	Level 3	26%	20%	25%
ELA	Level 2	4%	3%	5%
ELA	Level 1	3%	3%	3%
ELA Participation		94%		

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	67%	79%	79%
Math	Level 3	26%	14%	13%
Math	Level 2	4%	4%	6%
Math	Level 1	3%	2%	1%
Math Participation		93%		



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Updated May 6, 2026 - Assessment Data

Ainsworth

2425 SW Vista Ave
503-916-6288

K-5 Constructed 1912

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	281	287	294	289	273	269	272	280
Spanish Immersion	272	276	291	295	287	287	286	294
Total	**553**	**563**	**585**	**584**	**560**	**556**	**558**	**574**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	27.10	27.10	27.10	27.50	27.20	24.80
		Counseling Services	2.00	2.00	2.00	2.00	1.80	1.75
		Library/Media Services	0.50	0.50	0.50	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention			1.00	2.50	2.00	2.00
		Other						
	Classified /Non-Rep	Clerical	2.00	1.80	2.00	2.00	1.50	1.50
		Ed. Assistant/ Paraeducator	1.75	1.75	1.75	1.81		0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**35.85**	**35.65**	**36.85**	**38.81**	**35.50**	**33.45**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	2.20	2.00	1.00	1.50	1.00
		ESL	1.00	1.00	1.50	1.50	1.50	1.00
		Other						
	Classified /Non-Rep	Special Education	3.75	3.75	2.81	0.94	0.94	0.94
		ESL	0.44			0.44	0.44	
		Nutrition Services	1.44	1.44	1.50	2.25	2.13	2.13
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other			0.88	1.69	1.75	
CASR Total			**10.63**	**11.39**	**11.69**	**10.82**	**11.25**	**8.06**
Grand Total			**46.48**	**47.04**	**48.54**	**49.63**	**46.75**	**41.51**
Overall Students per FTE			11.9:1	12.0:1	12.1:1	11.8:1	12.0:1	13.4:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	25.60	27.60	28.60	28.40	28.40	26.65
		Gen Fund Equity				0.50	0.50	
		Gen Fund K-5 Arts	1.50	1.50	1.50	1.70	1.60	1.40
		Foundation				0.40		
		Title I						
		SIA/M98	0.50	0.50	0.50	2.00	1.50	1.50
		Other	2.00					
	Classified/ Non-Rep	Gen Fund	2.50	2.00	2.00	2.00	1.50	1.90
		Gen Fund Equity						
		Foundation	1.75	2.05	0.87	1.81		
		Title I						
		SIA/M98						
		Other			1.38			
	Admin.	Gen Fund	2.00	1.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other		1.00				
School Total			**35.85**	**35.65**	**36.85**	**38.81**	**35.50**	**33.45**

School and CASR	**Licensed**	31.60	32.80	34.10	35.50	35.00	31.55
	Classified/ Non-Rep	12.88	12.24	12.44	12.13	9.75	7.96
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Ainsworth

2425 SW Vista Ave
503-916-6288

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,769,474	$2,901,666	$3,274,627	$3,610,584	$3,483,789	$3,368,046
Associated Payroll Costs	$1,349,061	$1,400,119	$1,612,046	$1,743,566	$1,935,442	$1,930,556
Purchased Services	$ 21,118	$ 13,539	$ 41,023	$ 11,518	$ 21,228	$ 10,676
Supplies and Materials	$ 48,893	$ 42,146	$ 43,611	$ 91,898	$ 21,168	$ 9,649
Capital	$ 2,288	$ 1,674				
Other Objects					$ 636	$ 624
Total	**$ 4,190,835**	**$ 4,359,145**	**$ 4,971,308**	**$ 5,457,566**	**$ 5,462,263**	**$ 5,319,551**
Dollars per Student	**$ 7,578 :1**	**$ 7,743 :1**	**$ 8,498 :1**	**$ 9,345 :1**	**$ 9,754 :1**	**$ 9,568 :1**

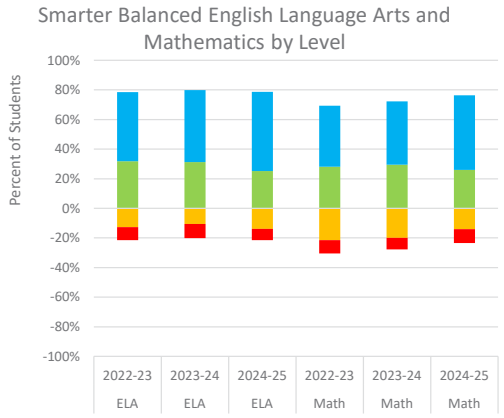
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	12%	14%	18%	21%	27%
*Students with Disabilities	9%	9%	9%	8%	8%
*English Language Learners	9%	9%	11%	10%	10%
*Free-Direct Certification	5%	6%	11%	10%	12%
Black	1%	1%	2%	2%	3%
Latino	21%	20%	23%	26%	27%
Native American	0%	1%	1%	1%	0%
Pacific Islander					
Multi-Race - Other Ancestry	3%	3%	4%	5%	6%
Multi-Race - Asian/White	7%	6%	5%	6%	7%
Asian	6%	6%	6%	5%	5%
White	62%	63%	60%	56%	53%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	47%	49%	53%
ELA	Level 3	32%	31%	25%
ELA	Level 2	13%	11%	14%
ELA	Level 1	9%	10%	8%
	ELA Participation	99%	98%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	41%	43%	51%
Math	Level 3	28%	30%	26%
Math	Level 2	22%	20%	14%
Math	Level 1	9%	8%	9%
	Math Participation	98%	98%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Alameda

2732 NE Fremont St
503-916-6036

K-5 Constructed 1921

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	525	538	521	496	513	504	502	507
Total	**525**	**538**	**521**	**496**	**513**	**504**	**502**	**507**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	26.30	22.60	21.40	20.40	20.40	20.40
		Counseling Services	2.00	2.00	2.00	1.60	1.40	1.60
		Library/Media Services	1.00	1.00	1.00	0.80	0.80	0.80
		Instructional Spec/ Coach/ Intervention			1.00	1.00	1.50	0.25
		Other						
	Classified /Non-Rep	Clerical	2.00	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator		1.48	1.48	1.97	0.38	0.40
		Library/Media Services						
		Other						
	Admin.		2.00	2.00	2.00	2.00	1.60	1.60
School Total			**33.30**	**30.58**	**30.38**	**29.27**	**27.58**	**26.55**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.60	5.30	3.00	3.00	3.50
		ESL	0.25	0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	7.50	7.50	7.50	7.50	6.57	6.57
		ESL						
		Nutrition Services	2.06	1.50	1.50	1.63	1.63	1.63
		Custodial	3.00	3.00	4.73	3.73	3.73	3.73
		Other	0.88					
CASR Total			**16.69**	**16.85**	**19.28**	**16.11**	**15.17**	**15.67**
Grand Total			**49.99**	**47.43**	**49.66**	**45.38**	**42.74**	**42.22**
Overall Students per FTE			10.5:1	11.3:1	10.5:1	10.9:1	12.0:1	11.9:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	27.05	21.85	23.65	21.60	21.40	20.85
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.50	1.00	1.00	1.20	1.20	1.20
		Foundation	0.25	0.25	0.25			
		Title I						
		SIA/M98	0.50	0.50	0.50	1.00	1.50	1.00
		Other		2.00				
	Classified/ Non-Rep	Gen Fund	2.00	1.80	1.50	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation		1.18	0.50	1.97		
		Title I						
		SIA/M98						
		Other			0.98		0.38	
	Admin.	Gen Fund	2.00	1.00	2.00	2.00	1.60	1.60
		Gen Fund Equity						
		Title I						
		Other		1.00				
School Total			**33.30**	**30.58**	**30.38**	**29.27**	**27.58**	**26.55**

School and CASR	**Licensed**	32.55	30.45	30.95	27.05	27.35	26.80
	Classified/ Non-Rep	15.44	14.98	16.71	16.33	13.79	13.82
	Admin.	2.00	2.00	2.00	2.00	1.60	1.60

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Alameda

2732 NE Fremont St
503-916-6036

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,787,212	$2,769,555	$2,979,672	$2,891,127	$2,820,045	$2,775,230
Associated Payroll Costs	$1,368,908	$1,287,900	$1,416,460	$1,382,655	$1,512,955	$1,551,305
Purchased Services	$ 8,180	$ 20,634	$ 25,367	$ 26,714	$ 7,607	$ 12,116
Supplies and Materials	$ 31,833	$ 52,183	$ 45,029	$ 32,203	$ 7,547	$ 11,654
Capital				$ 1,191		$ 3,291
Other Objects	$ 1,325	$ 1,395	$ 22		$ 564	$ 576
Total	**$ 4,197,458**	**$ 4,131,667**	**$ 4,466,551**	**$ 4,333,889**	**$ 4,348,718**	**$ 4,354,172**
Dollars per Student	**$ 7,995 :1**	**$ 7,680 :1**	**$ 8,573 :1**	**$ 8,738 :1**	**$ 8,477 :1**	**$ 8,639 :1**

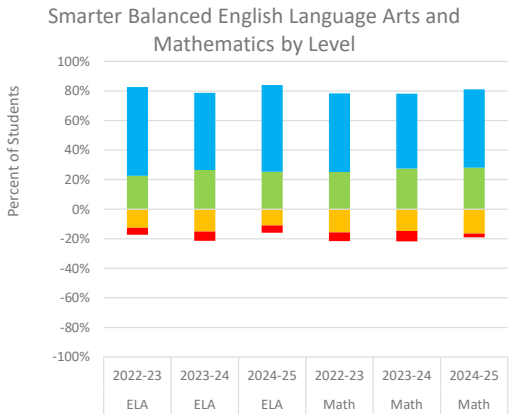
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	12%	17%	19%	20%	22%
*Students with Disabilities	13%	16%	19%	18%	18%
*English Language Learners	1%		1%	2%	1%
*Free-Direct Certification	2%	4%	8%	5%	6%
Black	0%	1%	1%	1%	1%
Latino	8%	7%	9%	9%	8%
Native American		0%	1%	1%	0%
Pacific Islander				0%	0%
Multi-Race - Other Ancestry	3%	4%	3%	4%	4%
Multi-Race - Asian/White	9%	8%	8%	8%	10%
Asian	2%	2%	2%	1%	2%
White	79%	78%	77%	76%	75%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	60%	52%	59%
ELA	Level 3	23%	27%	25%
ELA	Level 2	13%	15%	11%
ELA	Level 1	5%	6%	5%
	ELA Participation	94%	93%	92%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	53%	51%	53%
Math	Level 3	25%	28%	28%
Math	Level 2	16%	15%	17%
Math	Level 1	6%	7%	3%
	Math Participation	94%	92%	92%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Alliance

1530 NE Glisan
503-916-6486

The Oregon Department of Education has identified this school as a Comprehensive Supports for Improvement (CSI) school.

9-12 hayu alqi uyxat Constructed 2024

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Meek Campus	115	106	109					
Benson Campus	54	89	84					
Alliance				201	217	217	217	217
Total	**169**	**195**	**193**	**201**	**217**	**217**	**217**	**217**

Moving to a single site in 2024-25 SY. October enrollment shown for each year. Alliance accepts students every week through rolling admissions, and enrollment grows after October 1st.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	22.75	20.25	20.75	19.25	18.00	16.50
		Counseling Services	2.00	2.00	2.00	2.00	2.00	1.75
		Library/Media Services	0.50	0.50	0.50	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	1.00	2.00	1.50	1.25	1.00	0.50
		Other	4.00	5.00	3.50	2.00	1.50	1.00
	Classified /Non-Rep	Clerical	3.50	3.00	3.50	3.35	3.50	3.50
		Ed. Assistant/ Paraeducator	2.88	3.38	2.88	1.00	1.00	
		Library/Media Services						
		Other	1.00	1.00	1.00	1.00		
	Admin.		2.75	2.00	2.00	2.00	2.00	2.00
School Total			**40.38**	**39.13**	**37.63**	**32.85**	**30.00**	**26.25**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.00	2.20	2.20	3.00	2.50	2.00
		ESL		0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education						
		ESL						
		Nutrition Services	0.75	0.75	0.75	0.81	0.81	0.81
		Custodial	2.00	2.00	2.00	3.00	3.00	3.00
		Other	2.00	2.00	2.00		1.00	1.00
CASR Total			**6.75**	**7.20**	**7.20**	**7.06**	**7.56**	**7.06**
Grand Total			**47.13**	**46.33**	**44.83**	**39.91**	**37.56**	**33.31**
Overall Students per FTE			3.6:1	4.2:1	4.3:1	5.0:1	5.8:1	6.5:1

(Total Enrollment divided by Grand Total FTE)

Multiple Pathways building, is now officially named the hayu alqi uyxat building. The new name is from the Chinook Wawa language and means "Many Future Paths".

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	20.50	20.50	20.50	19.38	19.48	17.75
		Gen Fund Equity	2.00	2.00	2.00	2.50	1.33	1.50
		Gen Fund K-5 Arts						
		Foundation						
		Title I				0.72		
		SIA/M98	4.75	4.75	5.08	2.69	2.69	1.50
		Other	3.00	2.50	0.67	0.21		
	Classified/ Non-Rep	Gen Fund	4.50	4.50	4.50	4.35	3.50	2.50
		Gen Fund Equity	1.00	1.00	1.00			
		Foundation						
		Title I						
		SIA/M98	1.88	1.88	1.88	1.00	1.00	1.00
		Other						
	Admin.	Gen Fund	2.75	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**40.38**	**39.13**	**37.63**	**32.85**	**30.00**	**26.25**

School and CASR	**Licensed**	32.25	32.20	30.70	28.75	26.25	23.00
	Classified/ Non-Rep	12.13	12.13	12.13	9.16	9.31	8.31
	Admin.	2.75	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Alliance

1530 NE Glisan
503-916-6486

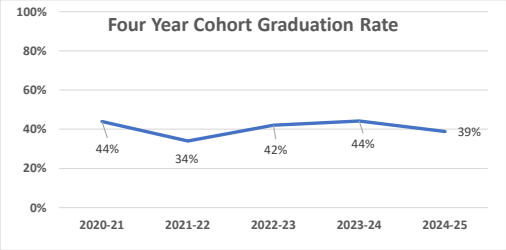
Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,987,485	$3,170,626	$3,369,694	$3,152,728	$2,979,223	$2,765,771
Associated Payroll Costs	$1,453,733	$1,513,637	$1,659,087	$1,474,692	$1,632,072	$1,568,620
Purchased Services	$ 42,786	$ 17,800	$ 23,892	$ 23,979	$ 63,360	$ 26,508
Supplies and Materials	$ 99,064	$ 102,101	$ 79,424	$ 77,433	$ 112,432	$ 175,833
Capital	$ 5,494	$ 141	$ 3,132	$ 1,639		
Other Objects	$ 675	$ 897	$ 722	$ 3,260	$ 804	$ 804
Total	**$ 4,589,239**	**$ 4,805,202**	**$ 5,135,952**	**$ 4,733,731**	**$ 4,787,891**	**$ 4,537,536**
Dollars per Student	**$ 27,155 :1**	**$ 24,642 :1**	**$ 26,611 :1**	**$ 23,551 :1**	**$ 22,064 :1**	**$ 20,910 :1**

Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	1%	5%	15%	30%	61%
*Students with Disabilities	25%	31%	31%	39%	34%
*English Language Learners	4%	6%	4%	3%	5%
*Free-Direct Certification	34%	33%	48%	42%	38%
Black	10%	13%	14%	8%	10%
Latino	24%	26%	22%	25%	24%
Native American	1%	2%	4%	2%	
Pacific Islander				1%	1%
Multi-Race - Other Ancestry	11%	10%	11%	10%	11%
Multi-Race - Asian/White	3%	3%	2%	2%	5%
Asian	1%	1%	2%	4%	2%
White	51%	47%	45%	49%	48%

Alliance did not have enough students participate in testing to display test score data.



Updated May 6, 2026: Enrollment and Dollars Per Student

Arleta

5109 SE 66th Ave
503-916-6330

Title I School for 2026-27

K-5 Constructed 1929

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	269	256	274	252	230	217	217	219
Total	**269**	**256**	**274**	**252**	**230**	**217**	**217**	**219**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	17.00	14.44	14.00	13.60	12.70	12.10
		Counseling Services	1.50	2.00	2.00	2.00	1.00	1.00
		Library/Media Services	1.00	1.00	0.50	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention		0.81	1.38	1.50	2.00	1.05
		Other		0.50	0.50	0.50	0.50	
	Classified /Non-Rep	Clerical	1.50	1.50	2.00	1.90	1.50	1.50
		Ed. Assistant/ Paraeducator	0.80	1.20	0.75		0.15	0.40
		Library/Media Services			0.50			
		Other					0.60	
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.80**	**22.45**	**22.63**	**21.10**	**20.05**	**17.45**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.50	3.30	3.50	2.50	2.50	2.50
		ESL	0.50	0.50	0.38	0.50		0.25
		Other						
	Classified /Non-Rep	Special Education	4.69	6.57	6.57	4.69	5.63	5.63
		ESL						
		Nutrition Services	1.69	1.69	1.69	1.00	1.00	1.00
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other	1.00	1.88	1.88	1.88	0.88	
CASR Total			**13.38**	**16.93**	**17.00**	**13.57**	**13.00**	**12.38**
Grand Total			**36.18**	**39.38**	**39.63**	**34.67**	**33.06**	**29.83**
Overall Students per FTE			7.4:1	6.5:1	6.9:1	7.3:1	7.0:1	7.3:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.75	14.75	14.88	14.40	13.40	12.20
		Gen Fund Equity	1.75	1.50	1.50	0.50	0.50	0.50
		Gen Fund K-5 Arts	1.00	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I				0.43	0.10	0.05
		SIA/M98	1.00	2.00	1.00	2.00	2.00	1.00
		Other	2.00		0.50	0.07		
	Classified/ Non-Rep	Gen Fund	1.50	1.50	2.25	1.50	1.50	1.90
		Gen Fund Equity	0.50					
		Foundation						
		Title I				0.40	0.75	
		SIA/M98						
		Other	0.30	1.20	1.00			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.80**	**22.45**	**22.63**	**21.10**	**20.05**	**17.45**

School and CASR	**Licensed**	22.50	22.55	22.25	21.20	19.30	17.30
	Classified/ Non-Rep	12.68	15.83	16.38	12.47	12.76	11.53
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Arleta

5109 SE 66th Ave
503-916-6330

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,731,810	$1,790,653	$2,009,511	$2,031,630	$1,986,457	$1,766,388
Associated Payroll Costs	$ 873,903	$ 873,248	$1,004,197	$ 948,807	$1,087,167	$1,013,246
Purchased Services	$ 5,822	$ 8,804	$ 6,176	$ 5,659	$ 10,644	$ 10,224
Supplies and Materials	$ 22,744	$ 19,454	$ 40,263	$ 38,392	$ 64,729	$ 9,828
Capital						
Other Objects		$ 65	$ 80		$ 324	$ 312
Total	**$ 2,634,279**	**$ 2,692,224**	**$ 3,060,226**	**$ 3,024,487**	**$ 3,149,321**	**$ 2,799,998**
Dollars per Student	**$ 9,793 :1**	**$ 10,516 :1**	**$ 11,169 :1**	**$ 12,002 :1**	**$ 13,693 :1**	**$ 12,903 :1**

Note: Foundation funding ended after the 2023-24 school year.

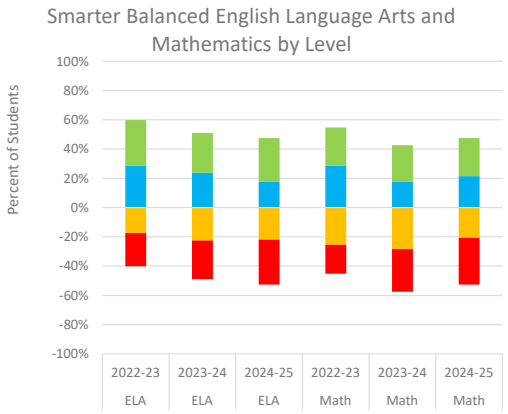
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	35%	43%	36%	43%	44%
*Students with Disabilities	17%	20%	25%	24%	25%
*English Language Learners	9%	7%	5%	2%	3%
*Free-Direct Certification	28%	28%	34%	34%	24%
Black	4%	4%	4%	5%	2%
Latino	12%	11%	16%	14%	15%
Native American	1%	1%	0%	1%	0%
Pacific Islander	0%	1%	1%	0%	0%
Multi-Race - Other Ancestry	7%	9%	8%	11%	12%
Multi-Race - Asian/White	3%	5%	5%	5%	6%
Asian	9%	7%	5%	5%	3%
White	64%	62%	61%	60%	61%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: losing neighborhood students to Creston, Marysville, Woodstock, and Woodmere. Gaining neighborhood students from Bridger and Marysville.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	31%	27%	30%
ELA	Level 3	29%	24%	18%
ELA	Level 2	18%	23%	22%
ELA	Level 1	23%	27%	31%
	ELA Participation	99%	97%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	26%	25%	26%
Math	Level 3	29%	18%	22%
Math	Level 2	26%	28%	21%
Math	Level 1	20%	29%	32%
	Math Participation	99%	95%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Astor

5601 N Yale St
503-916-6244

K-8 Constructed 1949

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	393	368	375	408	400	419	416	415
Total	**393**	**368**	**375**	**408**	**400**	**419**	**416**	**415**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	21.90	21.85	21.75	20.05	20.85	21.00
		Counseling Services	1.50	2.00	1.50	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	1.00	0.70	0.90
		Instructional Spec/ Coach/ Intervention	1.80	1.00	1.00	2.00	1.55	1.45
		Other	0.50	1.50	1.50	0.50	1.75	0.75
	Classified /Non-Rep	Clerical	1.80	3.00	2.90	2.00	2.00	1.75
		Ed. Assistant/ Paraeducator		2.63		0.50		0.40
		Library/Media Services						
		Other				1.50		0.55
	Admin.		2.00	1.00	1.00	2.00	1.00	2.00
School Total			**30.50**	**33.98**	**30.65**	**30.55**	**28.85**	**29.80**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.40	4.70	3.50	4.00	4.00
		ESL	0.25	0.25	0.50	0.50	0.50	0.25
		Other						
	Classified /Non-Rep	Special Education	2.81	3.75	3.75	6.57	8.44	6.57
		ESL						
		Nutrition Services	1.44	1.56	1.56	1.63	1.63	1.63
		Custodial	3.00	3.00	4.00	4.00	2.00	2.00
		Other		0.50	0.50	0.75	0.75	
CASR Total			**10.50**	**13.47**	**15.02**	**16.94**	**17.32**	**14.44**
Grand Total			**41.00**	**47.44**	**45.67**	**47.49**	**46.17**	**44.24**
Overall Students per FTE			9.6:1	7.8:1	8.2:1	8.6:1	8.7:1	9.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	21.30	21.45	21.75	20.60	22.30	22.00
		Gen Fund Equity	2.00	1.40	1.50		0.75	0.60
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I				0.55		
		SIA/M98	2.40	4.00	2.50	2.50	2.00	1.70
		Other	0.50		0.50	0.10		
	Classified/ Non-Rep	Gen Fund	1.60	3.50	2.50	1.50	1.50	1.90
		Gen Fund Equity		1.20		2.00	0.50	0.80
		Foundation						
		Title I				0.50		
		SIA/M98						
		Other	0.20	0.93	0.40			
	Admin.	Gen Fund	2.00	1.00	1.00	2.00	1.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**30.50**	**33.98**	**30.65**	**30.55**	**28.85**	**29.80**

School and CASR	**Licensed**	29.95	32.00	31.95	28.55	30.35	29.35
	Classified/ Non-Rep	9.05	14.44	12.72	16.94	14.82	12.89
	Admin.	2.00	1.00	1.00	2.00	1.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Astor

5601 N Yale St
503-916-6244

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,501,899	$2,627,352	$2,650,569	$2,762,462	$2,755,491	$3,015,875
Associated Payroll Costs	$1,217,024	$1,330,631	$1,338,872	$1,329,281	$1,542,614	$1,732,275
Purchased Services	$ 8,911	$ 9,963	$ 10,937	$ 19,881	$ 15,876	$ 16,392
Supplies and Materials	$ 55,691	$ 62,728	$ 54,304	$ 72,001	$ 16,932	$ 27,460
Capital			$ 134			
Other Objects					$ 480	$ 492
Total	**$ 3,783,525**	**$ 4,030,673**	**$ 4,054,816**	**$ 4,183,626**	**$ 4,331,393**	**$ 4,792,494**
Dollars per Student	**$ 9,627 :1**	**$ 10,953 :1**	**$ 10,813 :1**	**$ 10,254 :1**	**$ 10,828 :1**	**$ 11,438 :1**

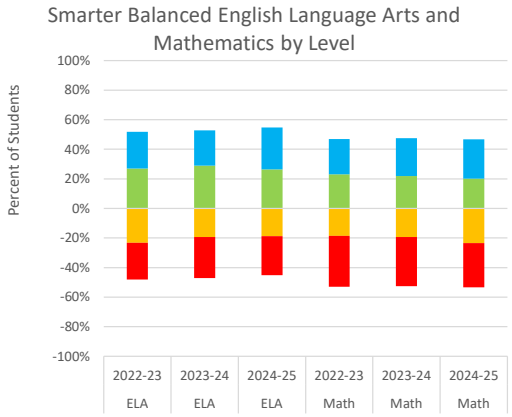
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	31%	35%	36%	38%	44%
*Students with Disabilities	21%	22%	24%	23%	24%
*English Language Learners	3%	4%	4%	3%	2%
*Free-Direct Certification	20%	21%	33%	28%	29%
Black	4%	4%	7%	7%	7%
Latino	17%	17%	16%	15%	15%
Native American	1%	2%	2%	2%	3%
Pacific Islander				0%	0%
Multi-Race - Other Ancestry	13%	11%	14%	13%	11%
Multi-Race - Asian/White	5%	5%	5%	5%	3%
Asian	3%	1%	1%	1%	2%
White	59%	60%	56%	57%	59%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	25%	24%	28%
ELA	Level 3	27%	29%	26%
ELA	Level 2	23%	19%	19%
ELA	Level 1	25%	28%	26%
	ELA Participation	98%	97%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	24%	26%	27%
Math	Level 3	23%	22%	20%
Math	Level 2	19%	19%	24%
Math	Level 1	35%	33%	30%
	Math Participation	97%	95%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Atkinson

5800 SE Division St
503-916-6333

Title I School for 2026-27

K-5 *Constructed 1953*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	206	196	203	188	188	177	184	192
Spanish Immersion	136	141	163	185	178	181	182	187
Total	**342**	**337**	**366**	**373**	**366**	**358**	**366**	**379**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	20.10	20.15	17.70	19.30	20.63	18.20
		Counseling Services	1.50	0.50	1.00	1.20	1.00	1.00
		Library/Media Services	0.80	0.90	1.00	0.60	0.80	0.60
		Instructional Spec/ Coach/ Intervention	0.75	0.75	1.00	1.00	1.25	0.50
		Other		1.00	0.50	0.40	0.60	0.60
	Classified /Non-Rep	Clerical	2.00	1.00	1.50	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	1.20	0.90	0.94		1.75	1.28
		Library/Media Services						
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**27.35**	**26.20**	**24.64**	**25.50**	**29.03**	**25.18**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.00	4.00	4.00	3.00	3.00
		ESL	1.00	1.00	1.50	2.00	2.22	1.50
		Other						
	Classified /Non-Rep	Special Education	8.44	7.50	9.38	9.38	9.38	9.38
		ESL		0.50	0.44	0.44		
		Nutrition Services	1.25	1.25	1.25	0.38	1.38	1.38
		Custodial	2.00	2.73	2.73	2.73	3.45	3.45
		Other						
CASR Total			**15.69**	**16.98**	**19.29**	**18.92**	**19.43**	**18.71**
Grand Total			**43.04**	**43.18**	**43.93**	**44.42**	**48.46**	**43.88**
Overall Students per FTE			7.9:1	7.8:1	8.3:1	8.4:1	7.6:1	8.2:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	18.72	19.15	17.95	18.30	20.00	17.60
		Gen Fund Equity	0.93	0.80	1.00	1.00	1.00	0.60
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation		0.25				
		Title I					0.58	
		SIA/M98	2.50	1.00	1.00	2.00	1.50	1.50
		Other		1.10	0.25			
	Classified/ Non-Rep	Gen Fund	1.81	1.50	1.50	1.50	1.50	1.90
		Gen Fund Equity	1.39	0.40				0.80
		Foundation				0.34		
		Title I					0.50	0.58
		SIA/M98					1.75	
		Other			0.94	0.16		
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**27.35**	**26.20**	**24.64**	**25.50**	**29.03**	**25.18**

School and CASR	**Licensed**	27.15	28.30	26.70	28.50	29.50	25.40
	Classified/ Non-Rep	14.89	13.88	16.23	14.92	17.96	17.48
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Atkinson

5800 SE Division St
503-916-6333

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,059,944	$2,109,854	$2,336,422	$2,485,905	$2,640,990	$2,465,323
Associated Payroll Costs	$1,012,505	$1,022,893	$1,079,070	$1,156,494	$1,502,928	$1,424,717
Purchased Services	$ 8,010	$ 7,076	$ 7,336	$ 13,204	$ 14,784	$ 14,616
Supplies and Materials	$ 39,235	$ 54,148	$ 60,743	$ 40,706	$ 72,914	$ 14,568
Capital	$ 388	$ 672	$ 251			
Other Objects			$ 498	$ 548	$ 444	$ 444
Total	**$ 3,120,084**	**$ 3,194,643**	**$ 3,484,321**	**$ 3,696,856**	**$ 4,232,060**	**$ 3,919,668**
Dollars per Student	**$ 9,123 :1**	**$ 9,480 :1**	**$ 9,520 :1**	**$ 9,911 :1**	**$ 11,563 :1**	**$ 10,949 :1**

Note: Foundation funding ended after the 2023-24 school year.

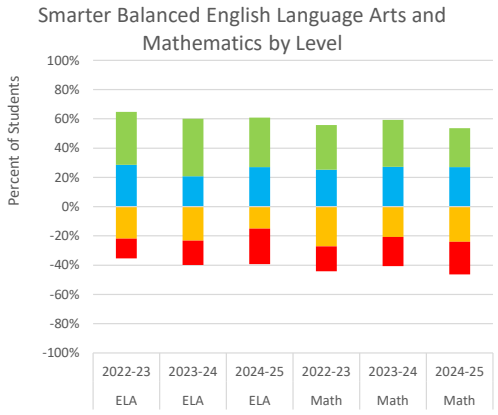
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	25%	28%	36%	42%	47%
*Students with Disabilities	16%	18%	19%	20%	19%
*English Language Learners	11%	12%	17%	21%	21%
*Free-Direct Certification	12%	13%	29%	34%	32%
Black	1%	1%	1%	2%	1%
Latino	27%	32%	33%	40%	38%
Native American	0%	0%	1%	0%	
Pacific Islander			0%	0%	1%
Multi-Race - Other Ancestry	2%	2%	3%	3%	4%
Multi-Race - Asian/White	3%	2%	3%	3%	3%
Asian	1%	1%	1%	1%	1%
White	66%	62%	59%	52%	53%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: gaining neighborhood students from Bridger.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	36%	39%	34%
ELA	Level 3	29%	21%	27%
ELA	Level 2	22%	23%	15%
ELA	Level 1	14%	17%	24%
	ELA Participation	95%	87%	90%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	31%	32%	27%
Math	Level 3	25%	27%	27%
Math	Level 2	27%	21%	24%
Math	Level 1	17%	20%	22%
	Math Participation	94%	85%	90%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Beach

1710 N Humboldt St
503-916-6236

Title I School for 2026-27

K-5 *Constructed 1928*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	127	145	134	121	133	144	154	157
Spanish Immersion	224	201	191	174	155	140	126	127
Total	**351**	**346**	**325**	**295**	**288**	**284**	**280**	**284**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	20.70	21.20	17.50	16.20	16.20	15.20
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention	1.50		1.50	2.50	1.50	2.00
		Other	0.50	0.50	1.50	1.00	0.88	1.00
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	1.75	2.00
		Ed. Assistant/ Paraeducator	1.24	0.40	1.99	3.62	0.20	1.40
		Library/Media Services			0.50			
		Other				0.75		
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**28.94**	**27.10**	**27.49**	**28.67**	**23.13**	**24.20**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.80	2.00	1.00	1.00	1.00
		ESL	1.00	1.00	1.00	1.00	1.00	1.00
		Other						
	Classified /Non-Rep	Special Education	0.94	0.94	1.88	0.94	0.94	0.94
		ESL	0.44	0.44				
		Nutrition Services	1.63	1.63	1.63	1.63	1.63	1.63
		Custodial	3.73	3.73	5.73	3.73	3.73	3.73
		Other		0.50	0.88	0.88	0.75	
CASR Total			**8.73**	**10.03**	**13.10**	**9.16**	**9.04**	**8.29**
Grand Total			**37.66**	**37.13**	**40.59**	**37.83**	**32.16**	**32.49**
Overall Students per FTE			9.3:1	9.3:1	8.0:1	7.8:1	9.0:1	8.7:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	20.95	18.95	17.50	16.60	16.60	16.10
		Gen Fund Equity	1.75	1.75	1.50	0.50	0.38	0.50
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation						
		Title I						
		SIA/M98	1.00	2.00	2.00	3.00	2.00	2.00
		Other						
	Classified/ Non-Rep	Gen Fund	1.50	1.50	2.00	1.50	1.70	2.90
		Gen Fund Equity	0.50	0.50	1.00	1.00	0.25	
		Foundation	0.36	0.19		0.04		
		Title I				2.08		0.50
		SIA/M98				1.75		
		Other	0.88	0.21	1.49			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**28.94**	**27.10**	**27.49**	**28.67**	**23.13**	**24.20**

School and CASR	**Licensed**	26.70	26.50	25.00	23.30	22.18	21.80
	Classified/ Non-Rep	9.96	9.63	14.59	13.53	8.99	9.69
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Beach

1710 N Humboldt St
503-916-6236

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,224,724	$2,161,589	$2,272,234	$2,451,121	$2,230,424	$2,318,563
Associated Payroll Costs	$1,012,517	$ 983,245	$1,090,734	$1,198,042	$1,247,508	$1,345,270
Purchased Services	$ 6,421	$ 10,802	$ 4,817	$ 12,016	$ 6,571	$ 12,000
Supplies and Materials	$ 38,745	$ 28,515	$ 37,047	$ 88,657	$ 6,523	$ 17,823
Capital						$ 1,500
Other Objects					$ 360	
Total	**$ 3,282,409**	**$ 3,184,151**	**$ 3,404,831**	**$ 3,749,836**	**$ 3,491,385**	**$ 3,695,156**
Dollars per Student	**$ 9,352 :1**	**$ 9,203 :1**	**$ 10,476 :1**	**$ 12,711 :1**	**$ 12,123 :1**	**$ 13,011 :1**

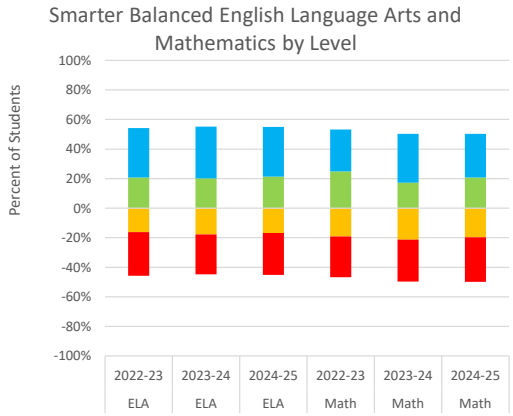
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	26%	32%	35%	38%	49%
*Students with Disabilities	11%	13%	16%	15%	14%
*English Language Learners	12%	8%	12%	11%	12%
*Free-Direct Certification	22%	28%	34%	32%	34%
Black	7%	11%	10%	10%	11%
Latino	28%	23%	28%	31%	30%
Native American					
Pacific Islander					
Multi-Race - Other Ancestry	7%	7%	7%	6%	7%
Multi-Race - Asian/White	2%	2%	4%	4%	4%
Asian		1%	1%	1%	2%
White	56%	57%	51%	48%	46%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	34%	35%	34%
ELA	Level 3	21%	20%	21%
ELA	Level 2	16%	18%	17%
ELA	Level 1	30%	27%	28%
	ELA Participation	96%	99%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	28%	33%	30%
Math	Level 3	25%	17%	21%
Math	Level 2	19%	21%	20%
Math	Level 1	28%	28%	30%
	Math Participation	93%	99%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Beaumont

4043 NE Fremont St
503-916-5610

6-8 Constructed 1926

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	344	317	320	319	315	313	294	279
Spanish Immersion	123	131	114	116	101	101	115	109
Total	**467**	**448**	**434**	**435**	**416**	**414**	**409**	**388**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	26.00	22.50	22.50	20.50	19.10	19.60
		Counseling Services	2.00	3.00	2.00	1.60	1.40	1.20
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention	2.00	1.00	1.00	2.00	2.00	0.20
		Other	1.50	1.50	1.50	1.00	1.00	1.00
	Classified /Non-Rep	Clerical	1.50	3.00	2.50	2.00	2.00	1.50
		Ed. Assistant/ Paraeducator	0.44				0.11	0.40
		Library/Media Services	1.00	1.00	0.50			
		Other	1.50	1.00	1.00	1.00		
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**38.44**	**35.50**	**33.50**	**30.60**	**28.11**	**26.40**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	5.50	5.80	6.50	5.50	5.50	5.50
		ESL	1.50	1.50	1.50	1.50	1.00	1.00
		Other						
	Classified /Non-Rep	Special Education	8.44	10.32	10.32	10.32	9.38	9.38
		ESL	0.44	0.44	0.44	0.44	0.44	
		Nutrition Services	1.31	1.38	1.38	1.50	1.50	1.50
		Custodial	3.73	5.73	4.45	3.73	3.73	3.73
		Other		1.00	1.00	1.00	1.00	1.00
CASR Total			**20.92**	**26.16**	**25.58**	**23.98**	**22.55**	**22.11**
Grand Total			**59.36**	**61.66**	**59.08**	**54.58**	**50.66**	**48.51**
Overall Students per FTE			7.9:1	7.3:1	7.3:1	8.0:1	8.2:1	8.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	25.50	22.75	21.65	22.60	21.10	20.30
		Gen Fund Equity	2.00	1.25	1.00		0.50	1.00
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	3.50	4.50	4.20	3.00	2.40	1.20
		Other	1.00		0.65			
	Classified/ Non-Rep	Gen Fund	3.00	3.00	1.50	1.70	1.90	1.90
		Gen Fund Equity	1.00	1.50	1.00	1.00		
		Foundation	0.44	0.44	0.20	0.12		
		Title I						
		SIA/M98			1.00			
		Other		0.06	0.30	0.18	0.21	
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**38.44**	**35.50**	**33.50**	**30.60**	**28.11**	**26.40**

School and CASR	**Licensed**	39.00	35.80	35.50	32.60	30.50	29.00
	Classified/ Non-Rep	18.36	23.86	21.58	19.98	18.16	17.51
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Beaumont

4043 NE Fremont St
503-916-5610

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,100,560	$2,983,390	$3,145,264	$3,112,346	$2,942,914	$2,862,495
Associated Payroll Costs	$1,484,183	$1,362,518	$1,474,271	$1,448,950	$1,592,676	$1,600,212
Purchased Services	$ 14,952	$ 13,977	$ 30,745	$ 35,573	$ 30,103	$ 16,308
Supplies and Materials	$ 127,554	$ 155,631	$ 168,110	$ 145,603	$ 16,044	$ 34,417
Capital						
Other Objects					$ 480	$ 492
Total	**$ 4,727,249**	**$ 4,515,516**	**$ 4,818,390**	**$ 4,742,472**	**$ 4,582,217**	**$ 4,513,924**
Dollars per Student	**$ 10,123 :1**	**$ 10,079 :1**	**$ 11,102 :1**	**$ 10,902 :1**	**$ 11,015 :1**	**$ 10,903 :1**

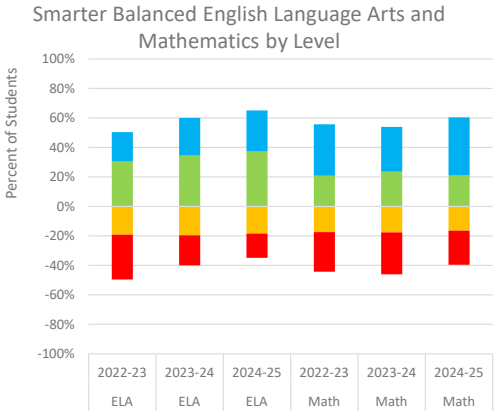
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	25%	25%	28%	30%	36%
*Students with Disabilities	16%	15%	18%	17%	19%
*English Language Learners	13%	14%	12%	12%	11%
*Free-Direct Certification	19%	19%	24%	23%	23%
Black	6%	5%	4%	2%	4%
Latino	27%	28%	25%	26%	24%
Native American					
Pacific Islander	0%	0%	1%	1%	0%
Multi-Race - Other Ancestry	6%	3%	4%	4%	5%
Multi-Race - Asian/White	5%	6%	5%	7%	8%
Asian	1%	1%	1%	1%	1%
White	56%	58%	60%	60%	59%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	20%	26%	28%
ELA	Level 3	30%	35%	37%
ELA	Level 2	19%	20%	19%
ELA	Level 1	30%	20%	16%
	ELA Participation	97%	96%	95%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	35%	30%	40%
Math	Level 3	21%	24%	21%
Math	Level 2	18%	18%	16%
Math	Level 1	27%	29%	23%
	Math Participation	97%	96%	95%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Benson

546 NE 12th Ave
503-916-5100

9-12 Reconstructed 2024

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	895	827	818	896	1025	1114	1200	1216
Total	**895**	**827**	**818**	**896**	**1025**	**1114**	**1200**	**1216**

Benson moved to Marshall beginning in 2021-22 SY while new building was under construction. Construction completed before 2024-25 SY

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	53.16	53.17	48.50	49.50	50.75	51.50
		Counseling Services	4.00	4.00	4.00	4.00	4.00	3.50
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	3.09	1.00	1.00	1.50	1.50	1.25
		Other	1.00	1.50	2.00	2.00	2.00	2.00
	Classified /Non-Rep	Clerical	6.25	5.88	7.25	6.25	7.25	6.00
		Ed. Assistant/ Paraeducator	0.44	0.88				
		Library/Media Services	1.00	1.00	0.50			
		Other	4.00	4.00	3.00	2.50	3.00	1.50
	Admin.		3.75	3.50	3.50	3.35	4.20	4.00
School Total			**77.69**	**75.92**	**70.75**	**70.10**	**73.70**	**70.75**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	9.50	8.50	9.00	9.00	9.00	8.00
		ESL	1.00	1.00	0.50	1.00	1.00	1.00
		Other	1.00					
	Classified /Non-Rep	Special Education	7.50	6.57	4.69	3.75	4.69	4.69
		ESL	0.44					
		Nutrition Services	2.75	3.19	3.19	2.56	3.00	3.00
		Custodial	6.00	9.00	9.00	8.73	8.73	8.73
		Other	2.00	2.00	4.00	4.00	4.00	4.00
CASR Total			**30.19**	**30.25**	**30.38**	**29.04**	**30.42**	**29.42**
Grand Total			**107.88**	**106.17**	**101.13**	**99.14**	**104.12**	**100.17**
Overall Students per FTE			8.3:1	7.8:1	8.1:1	9.0:1	9.8:1	11.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	49.66	47.82	44.31	46.20	50.75	49.02
		Gen Fund Equity	7.50	6.50	5.50	6.83	5.50	5.07
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	5.10	6.18	5.95	4.97	3.00	5.17
		Other		0.17	0.74			
	Classified/ Non-Rep	Gen Fund	8.69	9.75	8.75	6.75	8.25	5.42
		Gen Fund Equity						0.58
		Foundation						
		Title I						
		SIA/M98	2.00	2.00	2.00	2.00	2.00	1.50
		Other	1.00					
	Admin.	Gen Fund	3.50	3.50	3.50	3.35	4.20	4.00
		Gen Fund Equity						
		Title I						
		Other	0.25					
School Total			**77.69**	**75.92**	**70.75**	**70.10**	**73.70**	**70.75**

School and CASR	**Licensed**	73.75	70.17	66.00	68.00	69.25	68.25
	Classified/ Non-Rep	30.38	32.51	31.63	27.79	30.67	27.92
	Admin.	3.75	3.50	3.50	3.35	4.20	4.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Benson

546 NE 12th Ave
503-916-5100

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$6,309,813	$6,397,638	$6,484,779	$6,800,864	$7,235,751	$7,152,474
Associated Payroll Costs	$3,066,344	$3,106,527	$3,185,044	$3,288,994	$3,984,589	$4,147,059
Purchased Services	$ 39,382	$ 64,439	$ 65,113	$ 46,849	$ 51,576	$ 51,390
Supplies and Materials	$ 377,101	$ 274,434	$ 254,416	$ 368,386	$ 187,124	$ 714,126
Capital	$ 1,865		$ 20,192			
Other Objects	$ 26,747	$ 28,072	$ 15,245	$ 20,508	$ 1,548	$ 1,620
Total	**$ 9,821,252**	**$ 9,871,110**	**$ 10,024,789**	**$ 10,525,601**	**$ 11,460,588**	**$ 12,066,669**
Dollars per Student	**$ 10,973 :1**	**$ 11,936 :1**	**$ 12,255 :1**	**$ 11,747 :1**	**$ 11,181 :1**	**$ 10,832 :1**

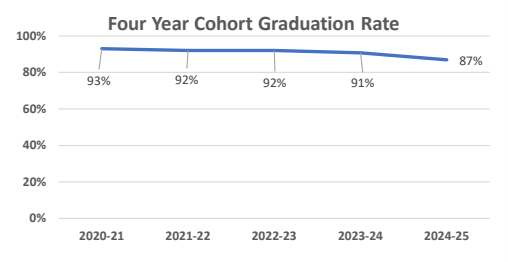
Note: Foundation funding ended after the 2023-24 school year.

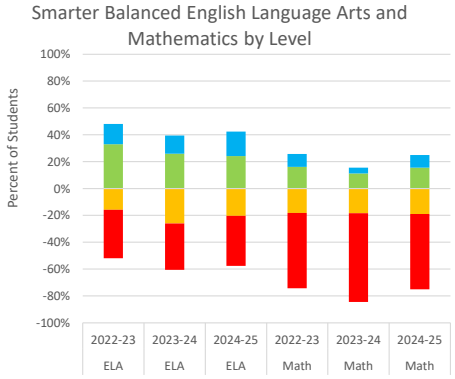
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	1%	13%	27%	40%	48%
*Students with Disabilities	19%	22%	24%	25%	23%
*English Language Learners	7%	5%	5%	6%	6%
*Free-Direct Certification	23%	22%	38%	36%	32%
Black	11%	11%	11%	10%	10%
Latino	28%	27%	27%	26%	26%
Native American	0%	1%	0%	1%	0%
Pacific Islander	1%	1%	0%	0%	0%
Multi-Race - Other Ancestry	6%	8%	9%	9%	8%
Multi-Race - Asian/White	3%	4%	3%	4%	4%
Asian	6%	5%	6%	5%	4%
White	44%	45%	43%	46%	47%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	15%	14%	18%
ELA	Level 3	33%	26%	24%
ELA	Level 2	16%	26%	20%
ELA	Level 1	36%	35%	37%
	ELA Participation	74%	59%	77%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	10%	4%	10%
Math	Level 3	16%	11%	16%
Math	Level 2	18%	18%	19%
Math	Level 1	56%	66%	56%
	Math Participation	62%	65%	58%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Beverly Cleary

1915 NE 33rd Ave.
503-916-6480

K-8 Fernwood constructed 1911

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	657	604	560	535	480	466	436	420
Total	**657**	**604**	**560**	**535**	**480**	**466**	**436**	**420**

Only using Fernwood starting in 2022-23 SY.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	28.50	26.25	26.00	24.90	23.67	23.00
		Counseling Services	2.00	2.00	2.00	1.60	1.55	1.60
		Library/Media Services	1.00	1.00	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention			1.00	1.00	0.73	1.20
		Other			0.50			
	Classified /Non-Rep	Clerical	3.00	2.00	2.50	2.90	2.50	1.50
		Ed. Assistant/ Paraeducator	0.37	1.00	1.00	0.90	0.50	
		Library/Media Services	0.50	0.50	0.50			
		Other						0.40
	Admin.		2.00	2.00	2.00	1.00	1.00	2.00
School Total			**37.37**	**34.75**	**36.00**	**32.90**	**30.55**	**30.30**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.50	3.70	3.50	2.50	2.50	2.50
		ESL	0.25	0.25	0.25	0.25	0.50	0.50
		Other						
	Classified /Non-Rep	Special Education	4.69	5.63	4.69	3.75	4.69	4.69
		ESL						
		Nutrition Services	1.56	0.94	0.94	1.44	1.44	1.44
		Custodial	3.73	5.00	4.00	4.00	4.00	5.00
		Other	1.75	0.88	0.88			
CASR Total			**14.48**	**16.39**	**14.25**	**11.94**	**13.13**	**14.13**
Grand Total			**51.85**	**51.14**	**50.25**	**44.84**	**43.68**	**44.43**
Overall Students per FTE			12.7:1	11.8:1	11.1:1	11.9:1	11.0:1	10.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	29.50	26.75	28.00	26.30	24.75	24.60
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	0.50	0.80	0.80	0.80
		Foundation		0.50				
		Title I						
		SIA/M98	1.00	1.00	1.00	1.00	1.00	1.00
		Other			0.50			
	Classified/ Non-Rep	Gen Fund	3.50	3.00	3.00	3.30	3.00	1.90
		Gen Fund Equity						
		Foundation	0.37	0.50	1.00	0.50		
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	2.00	2.00	2.00	1.00	1.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**37.37**	**34.75**	**36.00**	**32.90**	**30.55**	**30.30**

School and CASR	**Licensed**	34.25	33.20	33.75	30.85	29.55	29.40
	Classified/ Non-Rep	15.60	15.94	14.50	12.99	13.13	13.03
	Admin.	2.00	2.00	2.00	1.00	1.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Beverly Cleary

1915 NE 33rd Ave.
503-916-6480

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,105,535	$3,101,632	$3,380,084	$3,258,684	$3,132,462	$3,271,418
Associated Payroll Costs	$1,523,201	$1,460,122	$1,559,174	$1,539,215	$1,676,843	$1,826,361
Purchased Services	$ 9,352	$ 19,443	$ 18,256	$ 9,721	$ 18,312	$ 17,916
Supplies and Materials	$ 74,652	$ 104,952	$ 90,586	$ 60,836	$ 18,264	$ 27,856
Capital						
Other Objects			$ 25,609		$ 552	$ 540
Total	**$4,712,741**	**$4,686,149**	**$5,073,709**	**$4,868,455**	**$4,846,433**	**$5,144,091**
Dollars per Student	**$ 7,173 :1**	**$ 7,759 :1**	**$ 9,060 :1**	**$ 9,100 :1**	**$10,097 :1**	**$11,039 :1**

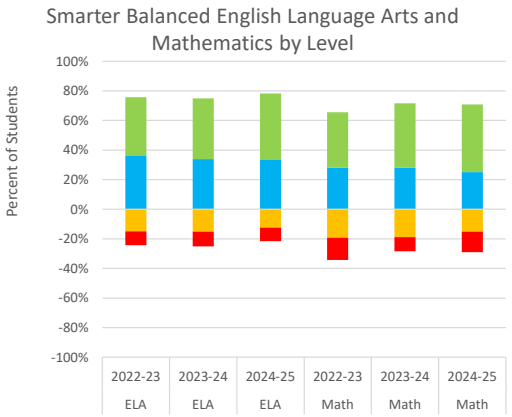
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	14%	16%	17%	19%	22%
*Students with Disabilities	12%	13%	13%	13%	13%
*English Language Learners	1%	1%	1%	1%	3%
*Free-Direct Certification	4%	4%	8%	10%	11%
Black	2%	2%	2%	2%	2%
Latino	8%	7%	7%	8%	7%
Native American	1%	1%	0%	0%	
Pacific Islander	0%	0%	0%	0%	
Multi-Race - Other Ancestry	5%	5%	6%	7%	6%
Multi-Race - Asian/White	7%	7%	8%	9%	9%
Asian	2%	2%	2%	2%	4%
White	76%	77%	75%	73%	71%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	39%	41%	45%
ELA	Level 3	37%	34%	33%
ELA	Level 2	15%	15%	12%
ELA	Level 1	10%	10%	9%
	ELA Participation	97%	96%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	37%	44%	46%
Math	Level 3	28%	28%	25%
Math	Level 2	19%	19%	15%
Math	Level 1	15%	10%	14%
	Math Participation	97%	95%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



Boise-Eliot/Humboldt

620 N Fremont St
503-916-6171

The Oregon Department of Education has identified this school as a Targeted Supports for Improvement (TSI) school. Title I School for 2026-27

K-5 Constructed 1926

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	321	327	308	315	294	295	298	306
Total	**321**	**327**	**308**	**315**	**294**	**295**	**298**	**306**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	19.95	21.70	16.00	15.00	14.40	14.40
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention	2.00	2.00	2.00	3.10	3.00	2.50
		Other	1.00	1.00	1.00	1.00	1.00	1.50
	Classified /Non-Rep	Clerical	1.50	1.50	2.75	2.75	2.00	2.00
		Ed. Assistant/ Paraeducator	8.01	8.88	3.50	2.63	1.75	2.15
		Library/Media Services						
		Other	3.63	2.75	0.88	0.88	0.88	
	Admin.		2.00	2.00	2.00	2.00	2.00	1.00
School Total			**40.09**	**41.84**	**30.13**	**28.95**	**26.63**	**25.15**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.70	4.50	4.00	4.00	4.00
		ESL	0.25	0.25	0.50	0.50	0.50	0.50
		Other	1.00	1.00	3.50	3.00	2.00	2.00
	Classified /Non-Rep	Special Education	8.44	9.38	8.44	9.38	9.38	8.44
		ESL						
		Nutrition Services	2.13	2.31	2.31	2.00	1.88	1.88
		Custodial	3.00	3.00	3.00	2.00	3.00	3.00
		Other		0.88	5.00	4.63	4.63	3.75
CASR Total			**17.82**	**21.52**	**27.26**	**25.51**	**25.38**	**23.57**
Grand Total			**57.90**	**63.36**	**57.39**	**54.46**	**52.01**	**48.72**
Overall Students per FTE			5.5:1	5.2:1	5.4:1	5.8:1	5.7:1	6.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	17.20	15.20	15.00	14.40	14.40	14.40
		Gen Fund Equity	0.99	1.50	2.50	1.50	0.80	1.00
		Gen Fund K-5 Arts	1.00	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I	0.45	0.50			0.32	1.30
		SIA/M98	3.00	6.00	3.00	3.50	3.00	2.25
		Other	2.31	3.00		0.50	0.68	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.50	1.50	1.75	1.90
		Gen Fund Equity	2.63	2.60	0.30			
		Foundation						
		Title I	5.01	4.91	4.33	2.75	1.13	0.30
		SIA/M98			1.00	1.75	1.75	1.75
		Other	4.00	4.13		0.25		0.20
	Admin.	Gen Fund	1.50	1.50	1.50	2.00	1.50	1.00
		Gen Fund Equity	0.50	0.50	0.50		0.50	
		Title I						
		Other						
School Total			**40.09**	**41.84**	**30.13**	**28.95**	**26.63**	**25.15**

School and CASR	**Licensed**	29.20	32.65	29.50	28.20	26.50	26.50
	Classified/ Non-Rep	26.70	28.70	25.89	24.26	23.51	21.22
	Admin.	2.00	2.00	2.00	2.00	2.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Boise-Eliot/Humboldt

620 N Fremont St
503-916-6171

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,868,519	$3,130,751	$2,726,988	$2,794,867	$2,624,497	$2,457,663
Associated Payroll Costs	$1,407,034	$1,498,191	$1,332,689	$1,293,724	$1,446,105	$1,417,554
Purchased Services	$ 24,095	$ 8,251	$ 8,840	$ 14,323	$ 3,608	$ 12,636
Supplies and Materials	$ 39,801	$ 47,827	$ 106,016	$ 58,897	$ 62,565	$ 56,495
Capital						
Other Objects		$ (24)	$ 7,598	$ 5,400	$ 5,730	$ 384
Total	**$ 4,339,450**	**$ 4,684,996**	**$ 4,182,132**	**$ 4,167,211**	**$ 4,142,504**	**$ 3,944,732**
Dollars per Student	**$ 13,519 :1**	**$ 14,327 :1**	**$ 13,578 :1**	**$ 13,229 :1**	**$ 14,090 :1**	**$ 13,372 :1**

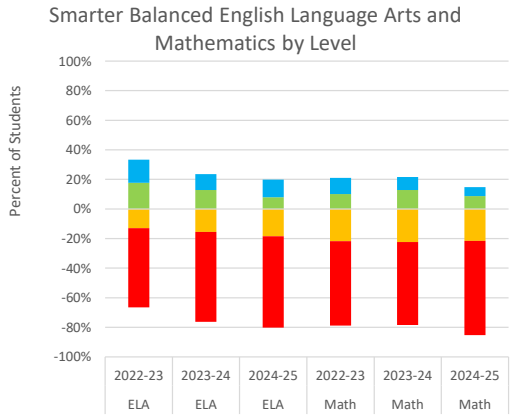
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	45%	49%	57%	62%	74%
*Students with Disabilities	16%	19%	21%	27%	28%
*English Language Learners	4%	2%	5%	5%	7%
*Free-Direct Certification	55%	57%	67%	65%	62%
Black	42%	42%	44%	44%	41%
Latino	17%	17%	18%	18%	20%
Native American	1%	1%	2%	1%	1%
Pacific Islander			1%		
Multi-Race - Other Ancestry	13%	15%	12%	12%	12%
Multi-Race - Asian/White	1%	0%	1%	1%	1%
Asian	2%	2%	1%	1%	1%
White	24%	23%	23%	23%	24%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	16%	11%	12%
ELA	Level 3	18%	13%	8%
ELA	Level 2	13%	16%	19%
ELA	Level 1	54%	61%	62%
	ELA Participation	98%	98%	95%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	11%	9%	6%
Math	Level 3	10%	13%	9%
Math	Level 2	22%	22%	22%
Math	Level 1	57%	56%	64%
	Math Participation	98%	98%	94%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Bridger Creative Science

7910 SE Market St
503-916-6336

K-8 Constructed 1951

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood			515	474	446	454	443	435
Total			**515**	**474**	**446**	**454**	**443**	**435**

2023-24 Merged with Creative Science

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers			26.80	24.50	23.30	22.47
		Counseling Services			2.00	1.60	1.40	1.40
		Library/Media Services			1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention			3.00	2.00	1.50	1.67
		Other			2.00		0.50	1.00
	Classified /Non-Rep	Clerical			2.00	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator			2.50	1.50	1.50	0.40
		Library/Media Services						
		Other			1.94		1.00	1.00
	Admin.				2.00	2.00	1.00	1.00
School Total					**43.24**	**34.10**	**32.70**	**31.43**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education			3.90	2.50	3.00	2.50
		ESL			1.00	0.50	0.50	0.50
		Other						
	Classified /Non-Rep	Special Education			2.81	0.94	0.94	0.94
		ESL						
		Nutrition Services			2.06	1.56	1.56	1.56
		Custodial			2.73	2.73	2.73	2.73
		Other						
CASR Total					**12.50**	**8.23**	**8.73**	**8.23**
Grand Total					**55.74**	**42.33**	**41.43**	**39.66**
Overall Students per FTE					9.2:1	11.2:1	10.8:1	11.4:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund			27.93	25.60	24.90	24.60
		Gen Fund Equity			1.88	0.30	0.50	0.40
		Gen Fund K-5 Arts			1.00	1.20	0.80	0.80
		Foundation						
		Title I						
		SIA/M98			4.00	2.00	1.50	1.73
		Other						
	Classified/ Non-Rep	Gen Fund			1.55	1.50	3.00	1.90
		Gen Fund Equity			1.25	1.40	1.00	1.00
		Foundation						
		Title I						
		SIA/M98			2.75			
		Other			0.89	0.10		
	Admin.	Gen Fund			2.00	2.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total					**43.24**	**34.10**	**32.70**	**31.43**

School and CASR	**Licensed**	0.00	0.00	39.70	32.10	31.20	30.53
	Classified/ Non-Rep	0.00	0.00	14.04	8.23	9.23	8.13
	Admin.	0.00	0.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Bridger Creative Science

7910 SE Market St
503-916-6336

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries			$3,536,250	$3,158,701	$3,120,632	$3,111,853
Associated Payroll Costs			$1,801,960	$1,598,007	$1,747,869	$1,799,458
Purchased Services			$ 11,666	$ 14,876	$ 10,750	$ 17,172
Supplies and Materials			$ 65,347	$ 38,677	$ 18,537	$ 37,109
Capital						
Other Objects					$ 540	$ 516
Total			**$ 5,415,223**	**$ 4,810,261**	**$ 4,898,328**	**$ 4,966,108**
Dollars per Student			**$ 10,515 :1**	**$ 10,148 :1**	**$ 10,983 :1**	**$ 10,939 :1**

Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	28%	32%	32%	37%	42%
*Students with Disabilities					21%
*English Language Learners					4%
*Free-Direct Certification					27%
Black					3%
Latino					9%
Native American					1%
Pacific Islander					1%
Multi-Race - Other Ancestry					7%
Multi-Race - Asian/White					3%
Asian					7%
White					69%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impacts: losing neighborhood enrollment to Atkinson and Arleta. Merge with Creative Science. Bridger Spanish Immersion moved to Lent.

Bridlemile

4300 SW 47th Dr
503-916-6292

K-5 Constructed 1956

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	435	458	446	419	423	414	416	411
Total	**435**	**458**	**446**	**419**	**423**	**414**	**416**	**411**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	20.90	20.40	21.40	21.00	19.40	18.40
		Counseling Services	1.50	1.50	1.66	2.00	1.70	1.00
		Library/Media Services	0.50	0.50	1.00	1.00	0.80	0.80
		Instructional Spec/ Coach/ Intervention	0.50	0.50	1.50	1.70	1.00	1.00
		Other						
	Classified /Non-Rep	Clerical	2.00	1.75	1.75	1.75	1.90	1.50
		Ed. Assistant/ Paraeducator						0.40
		Library/Media Services	0.50	0.50				
		Other						1.00
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**26.90**	**26.15**	**28.31**	**28.45**	**25.80**	**25.10**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.40	4.90	3.50	3.50	3.00
		ESL	0.50	0.50	0.50	0.50	0.50	0.25
		Other						
	Classified /Non-Rep	Special Education	5.63	6.57	5.63	6.57	6.57	5.63
		ESL						
		Nutrition Services	1.31	1.19	1.25	1.56	1.69	1.69
		Custodial	2.73	3.00	3.00	3.00	2.73	2.73
		Other		0.50	0.50	0.50	0.50	
CASR Total			**13.17**	**16.15**	**15.78**	**15.63**	**15.48**	**13.29**
Grand Total			**40.07**	**42.30**	**44.09**	**44.08**	**41.28**	**38.39**
Overall Students per FTE			10.9:1	10.8:1	10.1:1	9.5:1	10.2:1	10.8:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	18.90	20.90	23.15	21.40	20.70	19.00
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation	1.00	0.50	0.26	1.40		
		Title I						
		SIA/M98	2.50	0.50	0.50	1.70	1.00	1.00
		Other			0.65			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	1.50	1.50	1.90	1.90
		Gen Fund Equity						1.00
		Foundation	0.50	0.25	0.25	0.25		
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**26.90**	**26.15**	**28.31**	**28.45**	**25.80**	**25.10**

		2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School and CASR	**Licensed**	26.90	27.80	30.96	29.70	26.90	24.45
	Classified/ Non-Rep	12.17	13.50	12.13	13.38	13.38	12.94
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Bridlemile

4300 SW 47th Dr
503-916-6292

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,102,811	$2,185,262	$2,535,895	$2,616,540	$2,508,134	$2,527,667
Associated Payroll Costs	$1,035,076	$1,084,181	$1,294,990	$1,252,478	$1,377,316	$1,441,586
Purchased Services	$ 5,604	$ 7,293	$ 8,910	$ 15,627	$ 16,164	$ 16,308
Supplies and Materials	$ 21,456	$ 73,099	$ 87,731	$ 77,963	$ 16,092	$ 16,260
Capital						
Other Objects			$ 3,074		$ 492	$ 492
Total	**$ 3,164,947**	**$ 3,349,835**	**$ 3,930,600**	**$ 3,962,608**	**$ 3,918,198**	**$ 4,002,313**
Dollars per Student	**$ 7,276 :1**	**$ 7,314 :1**	**$ 8,813 :1**	**$ 9,457 :1**	**$ 9,263 :1**	**$ 9,667 :1**

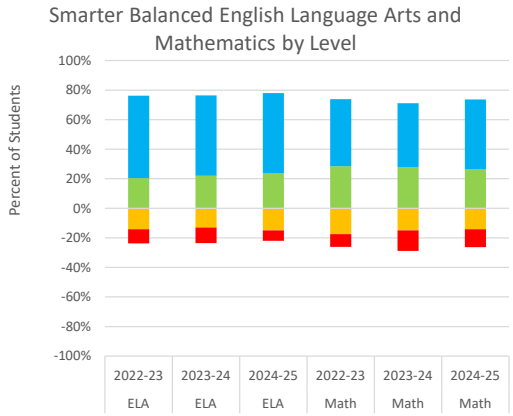
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	20%	21%	25%	28%	30%
*Students with Disabilities	16%	16%	19%	20%	21%
*English Language Learners	5%	6%	5%	3%	2%
*Free-Direct Certification	9%	7%	14%	14%	13%
Black	2%	2%	2%	3%	3%
Latino	7%	9%	9%	10%	10%
Native American	0%	0%		0%	1%
Pacific Islander	1%	1%			
Multi-Race - Other Ancestry	5%	5%	4%	4%	4%
Multi-Race - Asian/White	7%	8%	9%	9%	9%
Asian	5%	4%	5%	4%	4%
White	72%	71%	72%	70%	71%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	56%	54%	55%
ELA	Level 3	20%	22%	24%
ELA	Level 2	14%	13%	15%
ELA	Level 1	10%	11%	7%
	ELA Participation	99%	99%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	45%	43%	47%
Math	Level 3	29%	28%	26%
Math	Level 2	17%	15%	14%
Math	Level 1	9%	14%	12%
	Math Participation	100%	99%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Buckman

320 SE 16th Ave
503-916-6230

Title I School for 2026-27

K-5 *Constructed 1922*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	400	395	371	308	283	260	247	249
Total	**400**	**395**	**371**	**308**	**283**	**260**	**247**	**249**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	21.40	21.40	19.40	15.75	15.80	12.60
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention			1.00	1.80	1.50	1.60
		Other	1.50	0.50	0.50	1.00	0.50	0.50
	Classified /Non-Rep	Clerical	1.60	1.80	2.00	1.70	1.90	1.75
		Ed. Assistant/ Paraeducator						1.20
		Library/Media Services						
		Other						0.80
	Admin.		2.00	2.00	2.00	2.00	1.80	1.00
School Total			**28.50**	**27.70**	**26.90**	**23.85**	**23.10**	**20.85**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.50	5.50	6.00	4.50	4.50	4.00
		ESL	0.25	0.25	0.50	0.25	0.50	0.50
		Other						
	Classified /Non-Rep	Special Education	10.32	8.44	6.57	7.50	7.50	7.50
		ESL						
		Nutrition Services	1.25	1.38	1.50	1.25	1.25	1.25
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other	0.88	0.75	0.88	0.88	0.88	
CASR Total			**20.19**	**19.32**	**18.44**	**17.38**	**17.63**	**16.25**
Grand Total			**48.69**	**47.02**	**45.34**	**41.23**	**40.73**	**37.10**
Overall Students per FTE			8.2:1	8.4:1	8.2:1	7.5:1	6.9:1	7.0:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	19.15	18.20	18.95	15.60	15.60	13.70
		Gen Fund Equity	2.00	2.00	1.30	1.00	0.50	
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.80	0.80
		Foundation	0.17	0.59	0.60	0.83		
		Title I						0.10
		SIA/M98	0.50	2.00	0.50	1.50	1.50	1.50
		Other	2.08	0.11	0.55	0.02		
	Classified/ Non-Rep	Gen Fund	1.50	1.00	1.50	1.50	1.50	1.90
		Gen Fund Equity						1.00
		Foundation		0.80	0.10	0.10		
		Title I					0.40	0.85
		SIA/M98						
		Other	0.10		0.40	0.10		
	Admin.	Gen Fund	1.00	2.00	1.50	2.00	1.50	1.00
		Gen Fund Equity			0.50			
		Title I					0.30	
		Other	1.00					
School Total			**28.50**	**27.70**	**26.90**	**23.85**	**23.10**	**20.85**

School and CASR	**Licensed**	29.65	29.65	29.40	24.90	24.40	20.60
	Classified/ Non-Rep	17.04	15.37	13.94	14.33	14.53	15.50
	Admin.	2.00	2.00	2.00	2.00	1.80	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Buckman

320 SE 16th Ave
503-916-6230

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,331,294	$2,474,158	$2,576,073	$2,353,023	$2,341,931	$2,010,463
Associated Payroll Costs	$1,146,656	$1,154,592	$1,228,686	$1,097,694	$1,275,697	$1,153,092
Purchased Services	$ 6,130	$ 5,715	$ 9,727	$ 6,015	$ 12,228	$ 11,340
Supplies and Materials	$ 45,928	$ 61,891	$ 51,044	$ 39,208	$ 69,809	$ 12,729
Capital						
Other Objects					$ 372	$ 336
Total	**$ 3,530,007**	**$ 3,696,356**	**$ 3,865,531**	**$ 3,495,940**	**$ 3,700,037**	**$ 3,187,960**
Dollars per Student	**$ 8,825 :1**	**$ 9,358 :1**	**$ 10,419 :1**	**$ 11,350 :1**	**$ 13,074 :1**	**$ 12,261 :1**

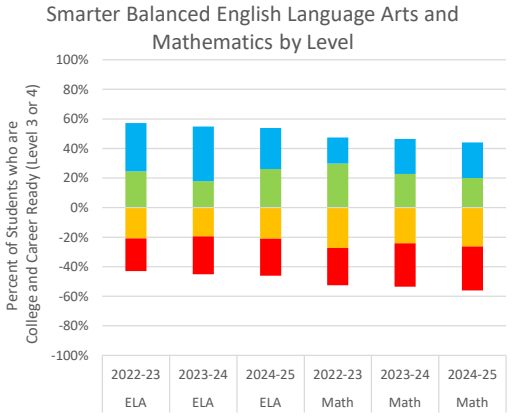
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	28%	29%	32%	38%	52%
*Students with Disabilities	20%	19%	21%	25%	25%
*English Language Learners	2%	3%	3%	4%	7%
*Free-Direct Certification	19%	23%	32%	35%	36%
Black	6%	3%	3%	4%	5%
Latino	13%	13%	14%	17%	13%
Native American	1%	1%	1%	1%	1%
Pacific Islander					0%
Multi-Race - Other Ancestry	8%	8%	8%	11%	10%
Multi-Race - Asian/White	5%	5%	6%	5%	5%
Asian	1%	1%	1%	2%	3%
White	68%	69%	67%	61%	63%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	33%	37%	28%
ELA	Level 3	25%	18%	26%
ELA	Level 2	21%	20%	21%
ELA	Level 1	22%	26%	25%
	ELA Participation	95%	91%	94%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	18%	24%	24%
Math	Level 3	30%	23%	20%
Math	Level 2	27%	24%	26%
Math	Level 1	25%	29%	30%
	Math Participation	96%	90%	93%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Capitol Hill

8401 SW 17th Ave
503-916-6303

K-5 Reconstructed 2017

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	324	333	361	318	325	322	313	303
Total	**324**	**333**	**361**	**318**	**325**	**322**	**313**	**303**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	17.00	16.00	16.00	15.90	14.60	13.60
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.80	0.75	0.75	0.60	0.60
		Instructional Spec/ Coach/ Intervention			1.00	1.50	1.50	1.00
		Other	0.50	0.50	1.00			
	Classified /Non-Rep	Clerical	2.00	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator			0.44		0.44	0.40
		Library/Media Services	0.50					
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.50**	**20.80**	**22.69**	**21.65**	**20.64**	**19.10**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.60	1.60	1.50	1.00	1.00
		ESL	0.50	0.25	0.25	0.25		
		Other						
	Classified /Non-Rep	Special Education	0.94	0.94	1.88	1.88	1.88	0.94
		ESL						
		Nutrition Services	1.00	1.00	1.25	1.25	1.25	1.25
		Custodial	2.73	3.73	3.73	2.73	2.73	2.73
		Other						
CASR Total			**6.16**	**7.51**	**8.70**	**7.60**	**6.85**	**5.91**
Grand Total			**28.66**	**28.31**	**31.39**	**29.25**	**27.49**	**25.01**
Overall Students per FTE			11.3:1	11.8:1	11.5:1	10.9:1	11.8:1	12.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	17.50	15.80	17.75	16.75	15.40	14.40
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	1.00	0.90	0.80	0.80
		Foundation						
		Title I						
		SIA/M98	0.50	0.50	0.50	1.50	1.50	1.00
		Other		1.00	0.50			
	Classified/ Non-Rep	Gen Fund	2.00	1.50	1.50	1.50	1.94	1.90
		Gen Fund Equity						
		Foundation	0.50					
		Title I						
		SIA/M98						
		Other			0.44			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.50**	**20.80**	**22.69**	**21.65**	**20.64**	**19.10**

School and CASR	**Licensed**	20.50	20.15	21.60	20.90	18.70	17.20
	Classified/ Non-Rep	7.16	7.16	8.79	7.35	7.79	6.81
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Capitol Hill

8401 SW 17th Ave
503-916-6303

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,884,967	$1,890,698	$2,230,606	$2,288,731	$2,066,689	$1,976,437
Associated Payroll Costs	$ 924,848	$ 879,234	$1,051,549	$1,038,935	$1,113,987	$1,101,274
Purchased Services	$ 3,014	$ 12,171	$ 13,115	$ 14,172	$ 12,900	$ 13,428
Supplies and Materials	$ 28,508	$ 28,056	$ 22,922	$ 21,128	$ 12,864	$ 13,392
Capital						
Other Objects					$ 384	$ 408
Total	**$ 2,841,337**	**$ 2,810,158**	**$ 3,318,192**	**$ 3,362,966**	**$ 3,206,824**	**$ 3,104,939**
Dollars per Student	**$ 8,770 :1**	**$ 8,439 :1**	**$ 9,192 :1**	**$ 10,575 :1**	**$ 9,867 :1**	**$ 9,643 :1**

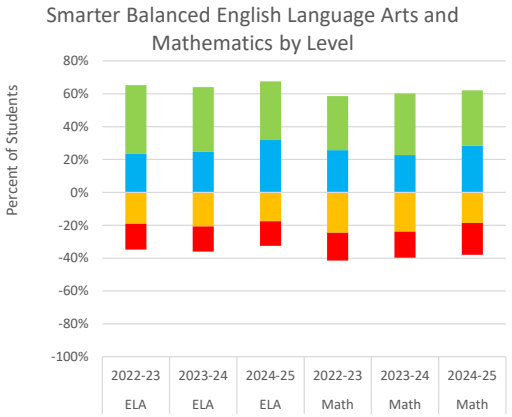
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	16%	21%	21%	25%	27%
*Students with Disabilities	8%	10%	10%	14%	13%
*English Language Learners	4%	3%	2%	1%	
*Free-Direct Certification	9%	12%	18%	17%	18%
Black	4%	3%	3%	3%	3%
Latino	7%	8%	10%	11%	12%
Native American	0%				
Pacific Islander	0%		1%	0%	
Multi-Race - Other Ancestry	7%	8%	8%	8%	9%
Multi-Race - Asian/White	4%	4%	3%	3%	3%
Asian	3%	2%	2%	3%	3%
White	75%	74%	73%	73%	71%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	42%	39%	36%
ELA	Level 3	23%	25%	32%
ELA	Level 2	19%	21%	18%
ELA	Level 1	16%	15%	15%
	ELA Participation	99%	96%	91%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	33%	38%	34%
Math	Level 3	26%	23%	29%
Math	Level 2	25%	24%	19%
Math	Level 1	17%	16%	19%
	Math Participation	99%	95%	92%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

César Chávez

5103 N Willis Blvd
503-916-5666

The Oregon Department of Education has identified this school as a Targeted Supports for Improvement (TSI) school. Title I School for 2026-27

K-8 Constructed 1927

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	176	169	156	145	143	130	126	115
Spanish Immersion	309	298	325	309	300	295	291	292
Total	**485**	**467**	**481**	**454**	**443**	**425**	**417**	**407**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	30.30	32.00	30.52	30.30	28.85	26.40
		Counseling Services	2.00	2.00	2.00	2.00	1.80	1.60
		Library/Media Services	1.00	1.00	1.00	0.80	0.80	0.60
		Instructional Spec/ Coach/ Intervention	3.50	3.50	2.78	5.20	4.50	2.70
		Other	1.00	1.50	1.00	1.00	2.00	1.80
	Classified /Non-Rep	Clerical	2.00	2.00	3.00	2.00	1.00	2.00
		Ed. Assistant/ Paraeducator	4.13	4.00	4.00	2.63		2.21
		Library/Media Services						
		Other	4.63	3.88	2.00	1.00	0.88	
	Admin.		2.00	2.00	2.00	3.00	2.00	3.00
School Total			**50.56**	**51.88**	**48.30**	**47.93**	**41.83**	**40.31**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.00	3.20	3.20	2.50	3.00	2.50
		ESL	3.50	4.00	4.50	4.00	4.00	3.00
		Other	1.00	1.00	1.00	1.00		
	Classified /Non-Rep	Special Education	0.94	0.94	0.94	2.81	3.75	1.88
		ESL	1.75	1.75	1.75	1.75	1.75	0.44
		Nutrition Services	2.88	2.88	2.88	2.38	2.38	2.38
		Custodial	3.73	4.73	3.73	3.73	3.73	3.73
		Other						
CASR Total			**15.79**	**18.49**	**17.99**	**18.17**	**18.61**	**13.92**
Grand Total			**66.35**	**70.37**	**66.29**	**66.10**	**60.43**	**54.23**
Overall Students per FTE			7.3:1	6.6:1	7.3:1	6.9:1	7.3:1	7.8:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	29.80	29.70	28.00	31.40	29.20	27.20
		Gen Fund Equity	4.00	4.30	4.00	0.60	2.00	0.60
		Gen Fund K-5 Arts	1.00	0.50	0.50	1.20	1.20	1.20
		Foundation						
		Title I			0.60	1.10	1.18	0.80
		SIA/M98	3.00	5.50	3.00	4.50	3.80	2.85
		Other			1.20	0.50	0.57	0.45
	Classified/ Non-Rep	Gen Fund	1.90	2.50	2.38	1.50	0.50	1.90
		Gen Fund Equity	1.25	0.40				
		Foundation						
		Title I	6.11	4.60	4.63	1.88	1.38	2.31
		SIA/M98			2.00	1.75		
		Other	1.50	2.38		0.50		
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity				1.00		1.00
		Title I						
		Other						
School Total			**50.56**	**51.88**	**48.30**	**47.93**	**41.83**	**40.31**

School and CASR	**Licensed**	44.30	48.20	46.00	46.80	44.95	38.60
	Classified/ Non-Rep	20.05	20.17	18.29	16.30	13.48	12.63
	Admin.	2.00	2.00	2.00	3.00	2.00	3.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

César Chávez

5103 N Willis Blvd
503-916-5666

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,529,103	$3,869,528	$3,802,129	$4,121,926	$3,974,141	$3,801,521
Associated Payroll Costs	$1,933,889	$1,993,458	$1,999,236	$2,078,139	$2,281,120	$2,250,251
Purchased Services	$ 136,205	$ 92,295	$ 55,404	$ 22,337	$ 30,827	$ 16,656
Supplies and Materials	$ 78,703	$ 65,493	$ 74,476	$ 81,941	$ 79,486	$ 69,265
Capital	$ 9,720	$ 21,109		$ 13,750		
Other Objects	$ 258	$ 347	$ 858	$ 1,099	$ 516	$ 504
Total	**$ 5,687,878**	**$ 6,042,229**	**$ 5,932,104**	**$ 6,319,192**	**$ 6,366,090**	**$ 6,138,197**
Dollars per Student	**$ 11,728 :1**	**$ 12,938 :1**	**$ 12,333 :1**	**$ 13,919 :1**	**$ 14,370 :1**	**$ 14,443 :1**

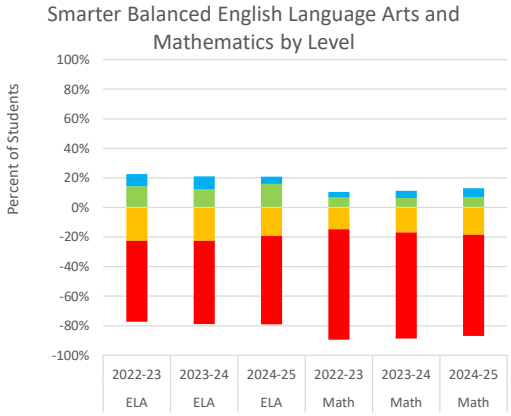
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	55%	60%	65%	74%	79%
*Students with Disabilities	13%	17%	18%	20%	20%
*English Language Learners	38%	40%	38%	38%	35%
*Free-Direct Certification	45%	46%	64%	66%	65%
Black	13%	15%	11%	11%	12%
Latino	58%	58%	61%	63%	64%
Native American	0%	0%	0%	0%	0%
Pacific Islander	2%	2%	2%	2%	1%
Multi-Race - Other Ancestry	6%	5%	5%	4%	4%
Multi-Race - Asian/White	1%	0%	1%	1%	1%
Asian	1%	1%	2%	2%	2%
White	19%	19%	18%	17%	16%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	8%	9%	5%
ELA	Level 3	14%	12%	16%
ELA	Level 2	23%	23%	19%
ELA	Level 1	55%	57%	60%
	ELA Participation	98%	98%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	4%	5%	6%
Math	Level 3	7%	6%	7%
Math	Level 2	15%	17%	18%
Math	Level 1	75%	72%	69%
	Math Participation	97%	98%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Chapman

1445 NW 26th Ave
503-916-6295

The Oregon Department of Education has identified this school as a Targeted Supports for Improvement (TSI) school. Title I School for 2026-27

K-5 Constructed 1923

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	341	350	344	349	330	336	318	325
Total	**341**	**350**	**344**	**349**	**330**	**336**	**318**	**325**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	19.20	18.70	17.50	17.20	17.20	15.20
		Counseling Services	1.50	1.50	1.50	1.00	1.00	1.00
		Library/Media Services	0.75	0.75	0.75	0.75	0.60	0.60
		Instructional Spec/ Coach/ Intervention	2.00	3.00	3.00	2.00	2.00	2.00
		Other				2.00	2.00	2.00
	Classified /Non-Rep	Clerical	1.75	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	2.30	4.68	4.68	5.31	2.00	3.35
		Library/Media Services	0.50					
		Other						
	Admin.		2.00	2.00	2.00	1.00	1.00	1.00
School Total			**30.00**	**32.13**	**30.93**	**30.76**	**27.30**	**26.65**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.80	1.60	1.80	1.80	1.50
		ESL	0.50	0.50	1.00	1.00	1.00	0.50
		Other						
	Classified /Non-Rep	Special Education	0.94	0.94	1.88	1.88	1.88	1.88
		ESL						
		Nutrition Services	1.38	1.56	1.63	1.69	1.69	1.69
		Custodial	3.00	3.00	3.00	4.00	3.00	3.00
		Other		0.50	1.38	0.50	0.50	
CASR Total			**6.81**	**8.30**	**10.48**	**10.86**	**9.86**	**8.56**
Grand Total			**36.81**	**40.43**	**41.41**	**41.62**	**37.17**	**35.22**
Overall Students per FTE			9.3:1	8.7:1	8.3:1	8.4:1	8.9:1	9.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	19.70	16.75	16.75	17.75	17.60	15.60
		Gen Fund Equity	1.25	1.80	1.80	1.00	1.00	1.00
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation						
		Title I		0.20	0.20			0.50
		SIA/M98	1.50	3.00	2.50	2.50	2.50	2.25
		Other		1.20	0.50	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	2.00	1.50	1.50	2.38	1.50	1.90
		Gen Fund Equity	1.10					
		Foundation	1.20	0.80	0.80	0.40		
		Title I		3.00	3.13	2.28	1.70	1.20
		SIA/M98				1.75		1.75
		Other	0.25	0.88	0.75		0.30	
	Admin.	Gen Fund	1.50	1.50	1.50	1.00	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50			
		Title I						
		Other						
School Total			**30.00**	**32.13**	**30.93**	**30.76**	**27.30**	**26.65**

School and CASR	**Licensed**	24.95	26.25	25.35	25.75	25.60	22.80
	Classified/ Non-Rep	9.86	12.18	14.06	14.87	10.57	11.42
	Admin.	2.00	2.00	2.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Chapman

1445 NW 26th Ave
503-916-6295

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,250,399	$2,506,093	$2,679,206	$2,579,697	$2,510,638	$2,452,061
Associated Payroll Costs	$1,144,158	$1,168,638	$1,280,163	$1,267,439	$1,386,463	$1,423,332
Purchased Services	$ 64,434	$ 36,326	$ 59,009	$ 31,987	$ 43,742	$ 13,668
Supplies and Materials	$ 33,718	$ 38,161	$ 68,032	$ 76,880	$ 73,470	$ 68,207
Capital						
Other Objects		$ 986	$ 487		$ 432	$ 408
Total	**$ 3,492,709**	**$ 3,750,204**	**$ 4,086,897**	**$ 3,956,004**	**$ 4,014,745**	**$ 3,957,676**
Dollars per Student	**$ 10,243 :1**	**$ 10,715 :1**	**$ 11,881 :1**	**$ 11,335 :1**	**$ 12,166 :1**	**$ 11,779 :1**

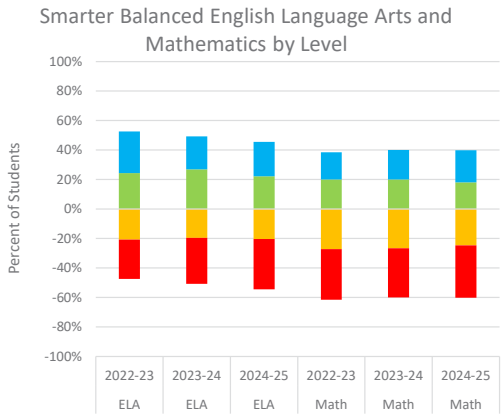
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	32%	34%	40%	51%	61%
*Students with Disabilities	10%	10%	12%	13%	17%
*English Language Learners	7%	9%	11%	10%	8%
*Free-Direct Certification	33%	39%	49%	50%	52%
Black	8%	6%	8%	8%	9%
Latino	16%	17%	16%	15%	18%
Native American	1%	1%	2%	2%	2%
Pacific Islander	0%	0%	1%	1%	1%
Multi-Race - Other Ancestry	7%	9%	10%	11%	11%
Multi-Race - Asian/White	7%	7%	7%	8%	7%
Asian	4%	4%	5%	6%	6%
White	58%	55%	53%	49%	46%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	28%	22%	23%
ELA	Level 3	24%	27%	22%
ELA	Level 2	21%	20%	20%
ELA	Level 1	27%	31%	34%
	ELA Participation	96%	93%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	18%	20%	22%
Math	Level 3	20%	20%	18%
Math	Level 2	27%	27%	25%
Math	Level 1	34%	33%	36%
	Math Participation	96%	95%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Chief Joseph

2409 N Saratoga St
503-916-6255

K-5 Constructed 1949

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	269	261	265	275	242	242	248	251
Total	**269**	**261**	**265**	**275**	**242**	**242**	**248**	**251**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	15.50	14.30	13.80	13.70	12.60	12.20
		Counseling Services	1.00	1.00	1.00	0.80	1.80	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention	1.00	1.00	2.00	1.50	1.00	
		Other	1.50	1.50	1.50	0.90	0.90	1.00
	Classified /Non-Rep	Clerical	1.00	1.75	1.75	1.75	1.80	1.50
		Ed. Assistant/ Paraeducator	0.90	1.38	0.50			0.80
		Library/Media Services	0.50	0.50				
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.90**	**22.93**	**22.05**	**20.25**	**19.70**	**17.90**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	0.50	1.30	1.80	1.00	1.00	1.00
		ESL	0.50	0.50	0.50	0.50	0.50	0.25
		Other						
	Classified /Non-Rep	Special Education	1.88	1.88	1.88	2.81	1.88	1.88
		ESL						
		Nutrition Services	1.00	1.00	1.00	1.00	1.00	1.00
		Custodial	2.00	2.00	2.00	2.00	2.00	2.00
		Other						
CASR Total			**5.88**	**6.68**	**7.18**	**7.31**	**6.38**	**6.13**
Grand Total			**28.78**	**29.60**	**29.23**	**27.56**	**26.08**	**24.03**
Overall Students per FTE			9.3:1	8.8:1	9.1:1	10.0:1	9.3:1	10.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	14.10	14.80	14.30	14.60	14.20	12.30
		Gen Fund Equity	1.00	1.00	1.00	0.50	0.40	0.50
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.90	0.80	0.80
		Foundation						
		Title I						
		SIA/M98	3.90	2.00	2.70	1.50	1.50	1.00
		Other			0.30			
	Classified/ Non-Rep	Gen Fund	1.40	2.40	1.50	1.70	1.60	2.30
		Gen Fund Equity	1.00				0.20	
		Foundation						
		Title I						
		SIA/M98						
		Other		1.23	0.75	0.05		
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.90**	**22.93**	**22.05**	**20.25**	**19.70**	**17.90**

School and CASR	**Licensed**	20.50	20.10	21.10	19.00	18.40	15.85
	Classified/ Non-Rep	7.28	8.50	7.13	7.56	6.68	7.18
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Chief Joseph

2409 N Saratoga St
503-916-6255

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,859,373	$1,898,798	$1,996,636	$1,960,863	$1,987,458	$1,695,974
Associated Payroll Costs	$ 891,442	$ 897,727	$ 971,231	$ 986,985	$1,068,445	$ 989,119
Purchased Services	$ 5,371	$ 4,115	$ 11,451	$ 9,677	$ 11,544	$ 11,028
Supplies and Materials	$ 33,893	$ 31,426	$ 37,039	$ 76,956	$ 11,496	$ 10,980
Capital						
Other Objects					$ 348	$ 336
Total	**$ 2,790,079**	**$ 2,832,066**	**$ 3,016,358**	**$ 3,034,481**	**$ 3,079,291**	**$ 2,707,437**
Dollars per Student	**$ 10,372 :1**	**$ 10,851 :1**	**$ 11,382 :1**	**$ 11,034 :1**	**$ 12,724 :1**	**$ 11,188 :1**

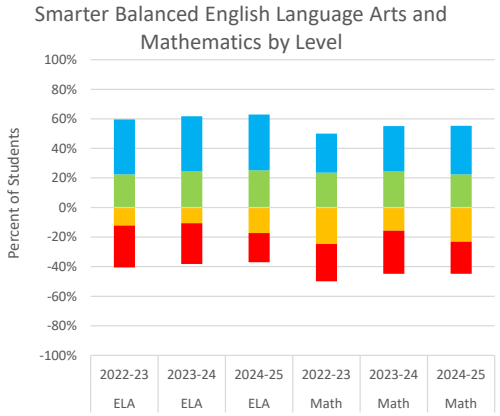
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	23%	24%	28%	29%	32%
*Students with Disabilities	11%	11%	16%	17%	14%
*English Language Learners	6%	8%	8%	6%	3%
*Free-Direct Certification	17%	21%	26%	21%	22%
Black	6%	6%	5%	4%	5%
Latino	10%	14%	13%	13%	12%
Native American	1%	1%	0%	1%	
Pacific Islander	2%	2%	2%	2%	1%
Multi-Race - Other Ancestry	8%	6%	5%	5%	5%
Multi-Race - Asian/White	5%	5%	4%	4%	7%
Asian	3%	2%	2%	1%	0%
White	66%	66%	70%	72%	69%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	37%	37%	38%
ELA	Level 3	22%	24%	25%
ELA	Level 2	12%	11%	17%
ELA	Level 1	28%	28%	20%
	ELA Participation	89%	96%	95%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	26%	31%	33%
Math	Level 3	24%	24%	22%
Math	Level 2	25%	16%	23%
Math	Level 1	25%	29%	22%
	Math Participation	91%	93%	93%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Clark

1231 SE 92nd
503-916-6561

Title I School for 2026-27

K-5 *Constructed 1955*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood			261	259	273	271	265	266
Mandarin Immersion			80	72	91	95	100	94
Total			**341**	**331**	**364**	**366**	**365**	**360**

Re-opened in 2023-24

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers			23.00	20.40	19.40	19.40
		Counseling Services			1.00	1.00	1.00	1.00
		Library/Media Services			0.50	0.90	0.80	0.80
		Instructional Spec/ Coach/ Intervention			1.00	3.00	2.50	2.10
		Other			2.50	3.00	2.00	2.00
	Classified /Non-Rep	Clerical			2.00	1.50	1.63	1.63
		Ed. Assistant/ Paraeducator			4.00	4.38	1.48	3.97
		Library/Media Services			1.00			
		Other			0.88	0.88		
	Admin.				2.00	1.00	2.00	1.00
School Total					**37.88**	**36.06**	**30.80**	**31.89**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education			2.30	2.00	2.00	2.00
		ESL			3.00	3.00	3.50	3.00
		Other						
	Classified /Non-Rep	Special Education			0.94	0.94	3.75	3.75
		ESL			0.88	0.88	1.31	0.44
		Nutrition Services			1.56	1.81	1.81	1.81
		Custodial			3.73	2.73	2.00	2.00
		Other						
CASR Total					**12.40**	**11.35**	**14.38**	**13.00**
Grand Total					**50.28**	**47.41**	**45.18**	**44.90**
Overall Students per FTE					6.8:1	7.0:1	8.1:1	8.2:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund			20.70	21.00	20.00	20.00
		Gen Fund Equity			3.25	1.50	0.50	1.00
		Gen Fund K-5 Arts			1.00	1.20	1.20	1.20
		Foundation						
		Title I				0.60	0.50	0.90
		SIA/M98			2.00	3.50	3.00	1.95
		Other			1.05	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund			2.50	1.50	1.50	1.90
		Gen Fund Equity			0.50			
		Foundation						
		Title I			2.90	2.43	1.60	1.94
		SIA/M98			1.50	2.63		1.75
		Other			0.48	0.20		
	Admin.	Gen Fund			2.00	1.00	1.00	1.00
		Gen Fund Equity					1.00	
		Title I						
		Other						
School Total					**37.88**	**36.06**	**30.80**	**31.89**

School and CASR	**Licensed**	0.00	0.00	33.30	33.30	31.20	30.30
	Classified/ Non-Rep	0.00	0.00	14.98	13.11	11.98	13.60
	Admin.	0.00	0.00	2.00	1.00	2.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Clark

1231 SE 92nd
503-916-6561

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries			$2,964,006	$2,990,477	$3,000,883	$2,936,697
Associated Payroll Costs			$1,486,091	$1,522,306	$1,669,511	$1,728,652
Purchased Services			$ 33,790	$ 18,061	$ 13,320	$ 14,844
Supplies and Materials			$ 148,346	$ 41,623	$ 71,408	$ 14,808
Capital				$ 906		
Other Objects					$ 396	$ 444
Total			**$ 4,632,233**	**$ 4,573,374**	**$ 4,755,518**	**$ 4,695,445**
Dollars per Student			**$ 13,584 :1**	**$ 13,817 :1**	**$ 13,065 :1**	**$ 12,829 :1**

Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*			56%	66%	79%
*Students with Disabilities			15%	16%	13%
*English Language Learners			37%	37%	42%
*Free-Direct Certification			64%	65%	67%
Black			21%	20%	17%
Latino			16%	15%	16%
Native American			2%	2%	1%
Pacific Islander			6%	6%	9%
Multi-Race - Other Ancestry			9%	9%	9%
Multi-Race - Asian/White			3%	2%	2%
Asian			22%	21%	25%
White			22%	25%	22%

Note: re-opened in 2023-24 so no historical data available.

Cleveland

3400 SE 26th Ave
503-916-5120

The Oregon Department of Education has identified this school as a a Targeted Supports for Improvement (TSI) school.

9-12 Constructed 1929

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	1493	1415	1328	1291	1336	1317	1353	1349
Mandarin Immersion	130	132	146	131	115	104	113	122
Total	**1623**	**1547**	**1474**	**1422**	**1451**	**1421**	**1466**	**1471**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	70.06	72.08	69.08	63.25	64.17	62.34
		Counseling Services	5.50	5.50	5.00	5.00	5.00	5.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	3.59	1.75	1.75	1.75	1.50	1.67
		Other	1.17	1.00	1.00	1.00	1.00	1.00
	Classified /Non-Rep	Clerical	8.90	9.53	9.33	8.03	8.71	6.38
		Ed. Assistant/ Paraeducator						
		Library/Media Services						
		Other	2.50	2.50	2.50	2.00	2.00	1.00
	Admin.		4.00	4.00	3.00	3.00	4.50	4.50
School Total			**96.72**	**97.36**	**92.66**	**85.03**	**87.87**	**82.88**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	9.00	10.80	10.60	9.00	9.50	10.00
		ESL	0.50	0.50	0.50	1.00	1.00	1.00
		Other	1.00					
	Classified /Non-Rep	Special Education	11.26	11.26	12.19	12.19	12.19	11.26
		ESL						
		Nutrition Services	1.44	1.38	1.44	2.00	2.19	2.19
		Custodial	7.00	12.00	11.00	8.00	9.00	9.00
		Other	3.00	3.00	4.00	4.00	4.00	4.00
CASR Total			**33.19**	**38.93**	**39.73**	**36.20**	**37.88**	**37.44**
Grand Total			**129.91**	**136.29**	**132.39**	**121.22**	**125.75**	**120.33**
Overall Students per FTE			12.5:1	11.4:1	11.1:1	11.7:1	11.5:1	11.8:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	75.57	75.16	73.66	64.33	66.17	62.84
		Gen Fund Equity				4.00	3.50	4.00
		Gen Fund K-5 Arts						
		Foundation	0.58	0.33		0.67		
		Title I						
		SIA/M98	4.50	4.50	4.17	3.00	3.00	4.17
		Other	0.67	1.33				
	Classified/ Non-Rep	Gen Fund	9.40	10.03	8.38	7.78	8.71	6.38
		Gen Fund Equity						
		Foundation				0.25		
		Title I						
		SIA/M98	2.00	2.00	2.00	2.00	2.00	1.00
		Other			1.45			
	Admin.	Gen Fund	4.00	4.00	3.00	3.00	4.00	4.00
		Gen Fund Equity						
		Title I						
		Other					0.50	0.50
School Total			**96.72**	**97.36**	**92.66**	**85.03**	**87.87**	**82.88**

School and CASR	**Licensed**	91.82	92.63	88.93	82.00	83.17	82.00
	Classified/ Non-Rep	34.09	39.66	40.46	36.22	38.09	33.82
	Admin.	4.00	4.00	3.00	3.00	4.50	4.50

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Cleveland

3400 SE 26th Ave
503-916-5120

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$8,173,958	$8,733,817	$8,890,784	$8,630,000	$9,102,535	$8,738,059
Associated Payroll Costs	$3,946,002	$4,200,012	$4,347,575	$4,146,684	$4,901,292	$4,932,332
Purchased Services	$ 42,440	$ 57,549	$ 65,952	$ 41,981	$ 123,965	$ 57,693
Supplies and Materials	$ 342,338	$ 548,459	$ 400,928	$ 540,166	$ 122,496	$ 229,557
Capital	$ 7,557	$ 2,055				
Other Objects	$ 75,261	$ 17,123	$ 42,050	$ 33,723	$ 1,884	$ 33,626
Total	**$12,587,555**	**$13,559,015**	**$13,747,290**	**$13,392,554**	**$14,252,172**	**$13,991,267**
Dollars per Student	**$ 7,756 :1**	**$ 8,765 :1**	**$ 9,327 :1**	**$ 9,418 :1**	**$ 9,822 :1**	**$ 9,846 :1**

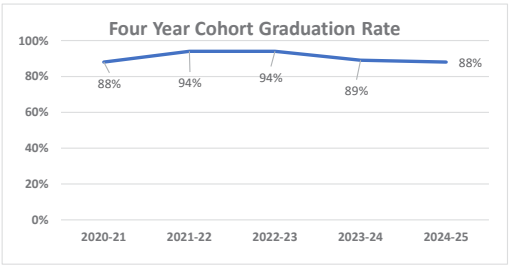
Note: Foundation funding ended after the 2023-24 school year.

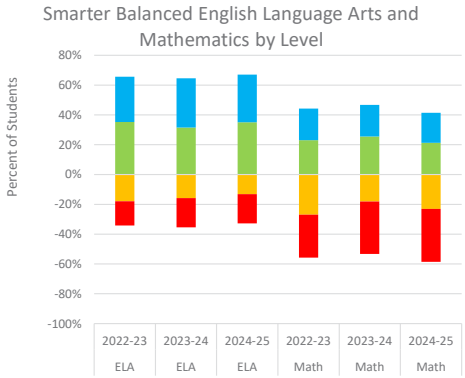
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	1%	6%	12%	18%	27%
*Students with Disabilities	12%	11%	12%	13%	13%
*English Language Learners	1%	1%	2%	2%	3%
*Free-Direct Certification	11%	10%	17%	15%	17%
Black	3%	2%	2%	3%	3%
Latino	9%	9%	8%	9%	8%
Native American	0%	0%	0%	0%	0%
Pacific Islander	0%	0%	0%	0%	0%
Multi-Race - Other Ancestry	5%	5%	5%	4%	4%
Multi-Race - Asian/White	8%	7%	8%	7%	7%
Asian	9%	9%	8%	7%	7%
White	67%	68%	68%	69%	70%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	30%	33%	32%
ELA	Level 3	35%	32%	35%
ELA	Level 2	18%	16%	13%
ELA	Level 1	16%	20%	20%
	ELA Participation	51%	70%	70%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	21%	21%	20%
Math	Level 3	23%	26%	21%
Math	Level 2	27%	18%	23%
Math	Level 1	29%	35%	36%
	Math Participation	49%	54%	49%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Creston

4701 SE Bush St
503-916-6340

K-5 Constructed 1946

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	250	260	238	241	213	199	187	177
Total	**250**	**260**	**238**	**241**	**213**	**199**	**187**	**177**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.75	14.00	14.00	13.90	11.60	8.40
		Counseling Services		1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.75	0.60	0.40
		Instructional Spec/ Coach/ Intervention		0.75	1.80	1.80	1.75	1.50
		Other	0.50	0.50	0.50			
	Classified /Non-Rep	Clerical	1.75	1.75	1.75	1.75	1.50	1.50
		Ed. Assistant/ Paraeducator	0.75	0.90	0.80	0.60		0.40
		Library/Media Services	0.50					
		Other			0.50	1.00	0.50	
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**20.25**	**20.90**	**22.35**	**21.80**	**17.95**	**14.20**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.80	1.60	1.00	1.00	1.00
		ESL	0.50	0.50	1.00	1.00	1.00	1.00
		Other						
	Classified /Non-Rep	Special Education	0.94	0.94	0.94	1.88	1.88	1.88
		ESL						
		Nutrition Services	2.00	1.63	1.63	1.63	1.63	1.63
		Custodial	3.00	4.00	3.00	3.00	3.00	3.00
		Other						
CASR Total			**7.44**	**8.86**	**8.16**	**8.50**	**8.50**	**8.50**
Grand Total			**27.69**	**29.76**	**30.51**	**30.30**	**26.45**	**22.70**
Overall Students per FTE			9.0:1	8.7:1	7.8:1	8.0:1	8.1:1	8.8:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.80	14.75	15.75	14.60	12.40	9.00
		Gen Fund Equity	1.25	1.00	1.00	0.25	0.25	0.50
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.90	0.80	0.80
		Foundation				0.05		
		Title I						
		SIA/M98	0.70	1.00	1.00	1.50	1.50	1.00
		Other			0.06	0.15		
	Classified/ Non-Rep	Gen Fund	2.00	1.50	1.51	2.50	1.50	1.90
		Gen Fund Equity	0.50	1.00		0.50	0.50	
		Foundation				0.35		
		Title I						
		SIA/M98						
		Other	0.50	0.15	1.54			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**20.25**	**20.90**	**22.35**	**21.80**	**17.95**	**14.20**

School and CASR	**Licensed**	17.75	19.55	20.90	19.45	16.95	13.30
	Classified/ Non-Rep	8.94	9.21	8.61	9.85	8.50	8.40
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Creston

4701 SE Bush St
503-916-6340

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,618,873	$1,728,336	$1,986,243	$2,047,516	$1,835,331	$1,442,831
Associated Payroll Costs	$ 854,310	$ 888,045	$1,009,083	$1,052,544	$1,003,446	$ 819,550
Purchased Services	$ 7,252	$ 4,666	$ 5,016	$ 6,207	$ 10,512	$ 9,648
Supplies and Materials	$ 39,904	$ 24,723	$ 18,882	$ 15,831	$ 10,488	$ 9,624
Capital						
Other Objects		$ 1,900			$ 312	$ 288
Total	**$ 2,520,339**	**$ 2,647,670**	**$ 3,019,224**	**$ 3,122,098**	**$ 2,860,089**	**$ 2,281,941**
Dollars per Student	**$ 10,081 :1**	**$ 10,183 :1**	**$ 12,686 :1**	**$ 12,955 :1**	**$ 13,428 :1**	**$ 11,467 :1**

Note: Foundation funding ended after the 2023-24 school year.

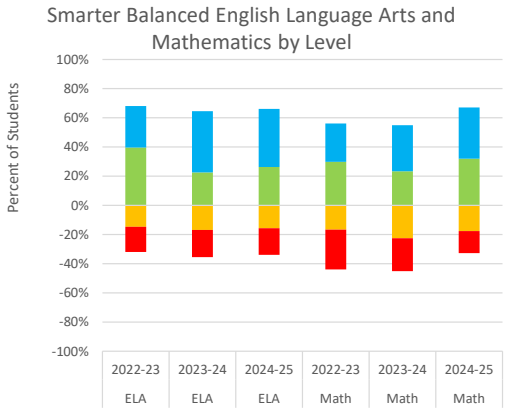
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	32%	36%	41%	41%	47%
*Students with Disabilities	22%	20%	24%	29%	30%
*English Language Learners	6%	8%	12%	14%	13%
*Free-Direct Certification	26%	20%	27%	28%	23%
Black	3%	3%	3%	3%	2%
Latino	15%	14%	14%	15%	15%
Native American		2%	0%		
Pacific Islander	1%	1%	2%	2%	1%
Multi-Race - Other Ancestry	6%	5%	6%	5%	4%
Multi-Race - Asian/White	2%	3%	5%	5%	7%
Asian	3%	4%	4%	5%	5%
White	70%	69%	66%	65%	66%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: gaining neighborhood students from Arleta.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	28%	42%	40%
ELA	Level 3	40%	23%	26%
ELA	Level 2	15%	17%	16%
ELA	Level 1	17%	19%	18%
	ELA Participation	97%	96%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	26%	32%	35%
Math	Level 3	30%	23%	32%
Math	Level 2	17%	23%	18%
Math	Level 1	27%	23%	15%
	Math Participation	95%	96%	95%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

da Vinci

2508 NE Everett St
503-916-5356

6-8 Constructed 1928

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	415	434	407	427	429	430	430	431
Total	**415**	**434**	**407**	**427**	**429**	**430**	**430**	**431**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	20.00	21.50	22.00	19.75	19.50	19.50
		Counseling Services	2.00	2.00	2.00	1.80	1.60	1.60
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention		1.00	1.00	1.80	0.80	0.60
		Other			1.00	1.00	1.00	0.80
	Classified /Non-Rep	Clerical	2.00	2.00	3.00	2.00	1.90	1.70
		Ed. Assistant/ Paraeducator	0.40	0.40	0.50	0.40	0.40	0.80
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		2.00	1.00	2.00	2.00	2.00	2.00
School Total			**27.40**	**28.90**	**32.50**	**29.25**	**27.70**	**27.50**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	3.80	3.80	3.00	3.00	2.00
		ESL	0.25	0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	4.69	2.81	2.81	3.75	2.81	1.88
		ESL						
		Nutrition Services	0.69	0.75	0.75	0.94	0.94	0.94
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other	0.88		1.00	1.00	1.00	1.00
CASR Total			**12.50**	**10.61**	**11.61**	**11.94**	**11.00**	**9.06**
Grand Total			**39.90**	**39.51**	**44.11**	**41.19**	**38.70**	**36.56**
Overall Students per FTE			10.4:1	11.0:1	9.2:1	10.4:1	11.1:1	11.8:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	19.75	19.75	21.05	21.05	21.10	21.00
		Gen Fund Equity	1.25	1.75	1.75	1.00	0.60	0.60
		Gen Fund K-5 Arts						
		Foundation	0.25	0.25	0.05			
		Title I						
		SIA/M98	1.00	3.00	2.80	2.80	1.70	1.40
		Other	0.25	0.25	0.85			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	3.00	2.00	1.90	2.10
		Gen Fund Equity	0.50	0.50	0.50		0.40	0.40
		Foundation	0.40	0.40	0.30	0.22		
		Title I						
		SIA/M98						
		Other			0.20	0.18		
	Admin.	Gen Fund	2.00	1.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**27.40**	**28.90**	**32.50**	**29.25**	**27.70**	**27.50**

School and CASR	**Licensed**	25.75	29.05	30.55	28.10	26.65	25.25
	Classified/ Non-Rep	12.15	9.46	11.56	11.09	10.05	9.31
	Admin.	2.00	1.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

da Vinci

2508 NE Everett St
503-916-5356

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,162,156	$2,521,616	$2,867,521	$2,827,918	$2,745,296	$2,751,829
Associated Payroll Costs	$1,042,325	$1,219,413	$1,351,260	$1,301,573	$1,509,185	$1,572,563
Purchased Services	$ 5,701	$ 5,543	$ 24,033	$ 12,354	$ 16,908	$ 16,824
Supplies and Materials	$ 33,943	$ 78,818	$ 84,812	$ 261,702	$ 16,872	$ 26,788
Capital				$ 8		
Other Objects	$ 500		$ 85		$ 504	$ 504
Total	**$ 3,244,626**	**$ 3,825,390**	**$ 4,327,712**	**$ 4,403,556**	**$ 4,288,765**	**$ 4,368,508**
Dollars per Student	**$ 7,818 :1**	**$ 8,814 :1**	**$ 10,633 :1**	**$ 10,313 :1**	**$ 9,997 :1**	**$ 10,159 :1**

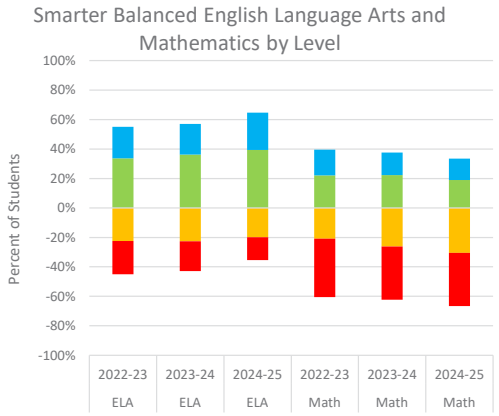
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	23%	26%	30%	35%	40%
*Students with Disabilities	16%	20%	20%	19%	15%
*English Language Learners		2%	2%	2%	2%
*Free-Direct Certification	15%	20%	27%	30%	30%
Black	6%	7%	6%	7%	5%
Latino	12%	12%	12%	14%	17%
Native American	0%	0%	1%	1%	1%
Pacific Islander					
Multi-Race - Other Ancestry	10%	8%	8%	8%	8%
Multi-Race - Asian/White	5%	6%	5%	4%	4%
Asian	2%	2%	2%	1%	1%
White	66%	65%	67%	65%	64%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	21%	21%	25%
ELA	Level 3	34%	36%	39%
ELA	Level 2	22%	23%	20%
ELA	Level 1	23%	20%	16%
	ELA Participation	89%	85%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	18%	15%	15%
Math	Level 3	22%	22%	19%
Math	Level 2	21%	26%	30%
Math	Level 1	40%	36%	36%
	Math Participation	86%	89%	95%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Duniway

7700 SE Reed College Pl
503-916-6343

K-5 Constructed 1926

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	436	422	409	387	362	364	342	352
Total	**436**	**422**	**409**	**387**	**362**	**364**	**342**	**352**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	20.40	19.20	18.20	16.00	16.00	15.00
		Counseling Services	1.00	1.50	1.50	1.20	1.00	1.00
		Library/Media Services	0.80	0.75	0.75	0.75	0.60	0.60
		Instructional Spec/ Coach/ Intervention	0.50		1.00	1.00	1.50	1.00
		Other	0.50					
	Classified /Non-Rep	Clerical	1.75	1.75	1.75	1.75	1.50	1.50
		Ed. Assistant/ Paraeducator	2.94	2.94	2.48	1.50	1.26	0.40
		Library/Media Services						
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**28.89**	**27.14**	**26.68**	**23.20**	**22.86**	**20.50**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.50	2.70	2.50	1.50	1.00	1.00
		ESL	0.25	0.25	0.25	0.50	0.25	
		Other						
	Classified /Non-Rep	Special Education	1.88	2.81	2.81	2.81	0.94	0.94
		ESL						
		Nutrition Services	1.25	1.25	1.25	1.38	1.50	1.50
		Custodial	3.00	4.00	3.00	3.00	3.00	3.00
		Other						
CASR Total			**7.88**	**11.01**	**9.81**	**9.19**	**6.69**	**6.44**
Grand Total			**36.77**	**38.15**	**36.49**	**32.39**	**29.54**	**26.94**
Overall Students per FTE			11.9:1	11.1:1	11.2:1	11.9:1	12.3:1	13.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	20.95	18.95	19.95	16.95	16.60	15.60
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	1.00	0.80	1.00	1.00
		Foundation	0.75	1.00		0.20		
		Title I						
		SIA/M98	0.50	0.50	0.50	1.00	1.50	1.00
		Other						
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.50	1.75	2.38	1.90
		Gen Fund Equity						
		Foundation	2.94	3.19	2.73	1.50		
		Title I						
		SIA/M98						
		Other	0.25				0.38	
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**28.89**	**27.14**	**26.68**	**23.20**	**22.86**	**20.50**

School and CASR	**Licensed**	24.95	24.40	24.20	20.95	20.35	18.60
	Classified/ Non-Rep	10.82	12.75	11.29	10.44	8.19	7.34
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Duniway

7700 SE Reed College Pl
503-916-6343

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,332,022	$2,306,773	$2,399,313	$2,295,500	$2,288,494	$2,158,339
Associated Payroll Costs	$1,074,674	$1,077,263	$1,179,331	$1,167,875	$1,238,461	$1,208,682
Purchased Services	$ 4,930	$ 14,733	$ 36,159	$ 15,722	$ 14,784	$ 14,760
Supplies and Materials	$ 62,364	$ 55,947	$ 71,791	$ 48,695	$ 14,993	$ 14,957
Capital	$ 805		$ 45,000			
Other Objects		$ 599			$ 444	$ 444
Total	**$ 3,474,796**	**$ 3,455,314**	**$ 3,731,594**	**$ 3,527,792**	**$ 3,557,176**	**$ 3,397,182**
Dollars per Student	**$ 7,970 :1**	**$ 8,188 :1**	**$ 9,124 :1**	**$ 9,116 :1**	**$ 9,826 :1**	**$ 9,333 :1**

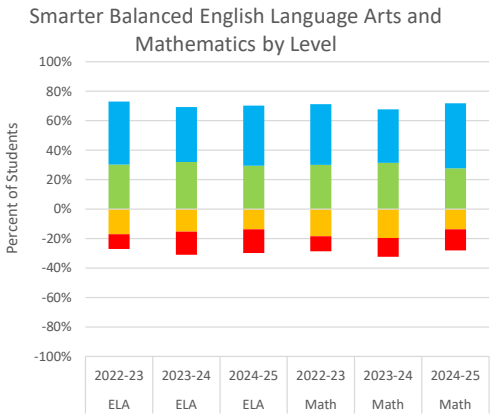
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	17%	19%	19%	21%	22%
*Students with Disabilities	16%	18%	17%	17%	16%
*English Language Learners	1%	3%	2%	3%	1%
*Free-Direct Certification	5%	6%	8%	9%	8%
Black	0%	1%	0%		
Latino	6%	6%	5%	5%	6%
Native American				0%	1%
Pacific Islander				0%	0%
Multi-Race - Other Ancestry	3%	3%	4%	4%	5%
Multi-Race - Asian/White	4%	5%	6%	8%	9%
Asian	3%	4%	3%	2%	1%
White	84%	82%	82%	81%	78%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	43%	37%	41%
ELA	Level 3	30%	32%	29%
ELA	Level 2	17%	15%	14%
ELA	Level 1	10%	16%	16%
	ELA Participation	98%	96%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	41%	36%	44%
Math	Level 3	30%	31%	28%
Math	Level 2	19%	20%	14%
Math	Level 1	10%	13%	14%
	Math Participation	97%	95%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Faubion

3039 NE Rosa Parks Way
503-916-5686

The Oregon Department of Education has identified this school as a Comprehensive Supports for Improvement (CSI) school. Title I School for 2026-27

K-8 Constructed 2017

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	627	615	571	589	600	586	580	615
Total	**627**	**615**	**571**	**589**	**600**	**586**	**580**	**615**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	38.50	38.50	33.84	31.44	31.14	32.04
		Counseling Services	3.00	3.00	3.00	2.00	2.00	3.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	4.00	4.00	3.00	4.00	4.30	3.20
		Other						
	Classified /Non-Rep	Clerical	4.00	4.00	4.00	4.00	4.00	4.00
		Ed. Assistant/ Paraeducator	14.26	15.94	5.38	3.63	2.95	3.52
		Library/Media Services						
		Other	2.00	1.00	1.00	1.00	1.00	1.00
	Admin.		3.00	3.00	3.00	3.00	3.00	3.00
School Total			**69.76**	**70.44**	**54.22**	**50.07**	**49.39**	**50.76**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.40	3.90	2.50	3.50	3.50
		ESL	2.00	2.00	2.50	2.50	2.50	2.00
		Other	1.00	3.50	5.66	23.66	11.66	11.66
	Classified /Non-Rep	Special Education	1.88	1.88	0.94	0.94	3.75	3.75
		ESL	0.88	1.75	0.87	0.87	0.87	0.44
		Nutrition Services	3.63	3.25	3.25	3.19	3.19	3.19
		Custodial	6.00	5.00	7.00	4.00	5.00	5.00
		Other	2.00	6.00	14.54	27.88	27.68	26.93
CASR Total			**20.38**	**27.78**	**38.66**	**65.54**	**58.15**	**56.46**
Grand Total			**90.14**	**98.22**	**92.89**	**115.61**	**107.54**	**107.22**
Overall Students per FTE			7.0:1	6.3:1	6.1:1	5.1:1	5.6:1	5.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	31.57	31.41	30.49	31.94	31.34	33.08
		Gen Fund Equity	3.10	4.60	3.60	0.50	0.50	1.10
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation						
		Title I	1.00	0.32	0.75	0.80	1.10	0.89
		SIA/M98	4.33	4.50	5.00	4.00	4.30	2.90
		Other	5.50	4.67				0.07
	Classified/ Non-Rep	Gen Fund	2.63	3.99	2.00	1.50	2.38	2.40
		Gen Fund Equity	1.50			0.10	0.10	
		Foundation						
		Title I	9.51	8.77	3.22	3.40	2.35	2.00
		SIA/M98			3.00	3.13	2.25	3.38
		Other	6.62	8.19	2.17	0.50	0.88	0.74
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity	1.00	1.00	1.00	1.00	1.00	1.00
		Title I						
		Other						
School Total			**69.76**	**70.44**	**54.22**	**50.07**	**49.39**	**50.76**

School and CASR	**Licensed**	52.50	56.40	52.90	67.10	56.10	56.40
	Classified/ Non-Rep	34.64	38.82	36.99	45.51	48.44	47.82
	Admin.	3.00	3.00	3.00	3.00	3.00	3.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Faubion

3039 NE Rosa Parks Way
503-916-5686

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$4,610,931	$5,053,481	$4,888,335	$4,643,697	$4,716,881	$4,644,248
Associated Payroll Costs	$2,423,564	$2,591,178	$2,429,217	$2,265,598	$2,643,704	$2,741,141
Purchased Services	$ 87,815	$ 20,752	$ 39,227	$ 35,703	$ 28,527	$ 13,327
Supplies and Materials	$ 79,313	$ 85,252	$ 71,695	$ 73,569	$ 166,191	$ 126,397
Capital	$ 25	$ 70	$ 114			
Other Objects	$ 559		$ 115	$ 115	$ 648	$ 684
Total	**$ 7,202,207**	**$ 7,750,732**	**$ 7,428,702**	**$ 7,018,682**	**$ 7,555,951**	**$ 7,525,797**
Dollars per Student	**$ 11,487 :1**	**$ 12,603 :1**	**$ 13,010 :1**	**$ 11,916 :1**	**$ 12,593 :1**	**$ 12,843 :1**

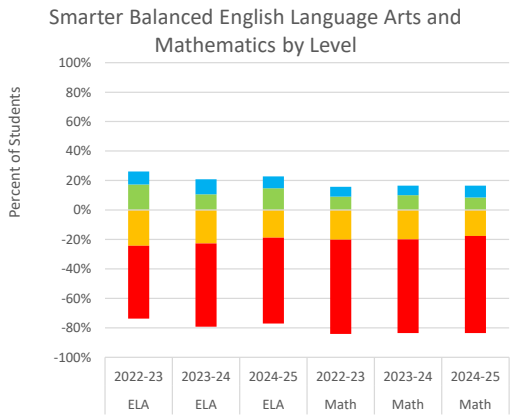
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	41%	43%	47%	53%	66%
*Students with Disabilities	12%	15%	13%	15%	18%
*English Language Learners	13%	15%	15%	19%	18%
*Free-Direct Certification	44%	44%	52%	55%	56%
Black	29%	27%	25%	23%	23%
Latino	27%	28%	29%	30%	29%
Native American	2%	2%	1%	1%	1%
Pacific Islander	1%	2%	2%	3%	4%
Multi-Race - Other Ancestry	12%	14%	14%	13%	14%
Multi-Race - Asian/White	2%	2%	1%	1%	1%
Asian	2%	2%	2%	1%	1%
White	25%	25%	26%	28%	27%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	9%	10%	8%
ELA	Level 3	17%	11%	15%
ELA	Level 2	24%	23%	19%
ELA	Level 1	50%	57%	58%
	ELA Participation	98%	96%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	7%	6%	8%
Math	Level 3	9%	10%	9%
Math	Level 2	20%	20%	18%
Math	Level 1	64%	64%	66%
	Math Participation	97%	97%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Forest Park

9935 NW Durrett St
503-916-5400

K-5 Constructed 1998

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	333	328	321	303	264	260	261	261
Total	**333**	**328**	**321**	**303**	**264**	**260**	**261**	**261**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	16.00	15.00	14.50	14.80	13.60	11.60
		Counseling Services	1.50	1.50	1.50	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention			1.00	2.00	1.00	1.00
		Other						
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	1.50	1.69	1.75	0.25		0.60
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.50**	**21.69**	**22.25**	**21.15**	**18.70**	**17.30**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	0.50	1.30	1.10	0.50	0.50	0.50
		ESL	1.00	0.50	0.50	0.25	0.25	
		Other						
	Classified /Non-Rep	Special Education	0.94	1.88	1.88	2.81	0.94	0.94
		ESL						
		Nutrition Services	1.25	1.25	1.25	1.00	1.00	1.00
		Custodial	2.00	4.00	2.00	2.00	2.00	2.00
		Other						
CASR Total			**5.69**	**8.93**	**6.73**	**6.56**	**4.69**	**4.44**
Grand Total			**28.19**	**30.61**	**28.98**	**27.71**	**23.39**	**21.74**
Overall Students per FTE			11.8:1	10.7:1	11.1:1	10.9:1	11.3:1	12.0:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	15.50	15.50	15.50	15.60	14.40	12.40
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	0.50	0.80	0.80	0.80
		Foundation				1.00		
		Title I						
		SIA/M98	0.50	0.50	1.50	1.00	1.00	1.00
		Other	1.00					
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	1.50	1.50	2.10
		Gen Fund Equity						
		Foundation	1.50	1.69	1.30	0.25		
		Title I						
		SIA/M98						
		Other			0.45			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.50**	**21.69**	**22.25**	**21.15**	**18.70**	**17.30**

School and CASR	**Licensed**	19.50	18.80	19.10	19.15	16.95	14.70
	Classified/ Non-Rep	7.69	10.81	8.88	7.56	5.44	6.04
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Forest Park

9935 NW Durrett St
503-916-5400

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,796,047	$1,785,656	$1,926,881	$1,928,678	$1,869,288	$1,764,111
Associated Payroll Costs	$ 885,242	$ 864,058	$ 961,599	$ 977,033	$1,022,786	$ 994,566
Purchased Services	$ 5,013	$ 4,485	$ 5,092	$ 6,927	$ 12,024	$ 11,544
Supplies and Materials	$ 28,621	$ 36,356	$ 35,141	$ 34,124	$ 12,000	$ 11,496
Capital			$ 110,205			
Other Objects					$ 360	$ 348
Total	**$ 2,714,922**	**$ 2,690,555**	**$ 3,038,917**	**$ 2,946,763**	**$ 2,916,458**	**$ 2,782,065**
Dollars per Student	**$ 8,153 :1**	**$ 8,203 :1**	**$ 9,467 :1**	**$ 9,725 :1**	**$ 11,047 :1**	**$ 10,700 :1**

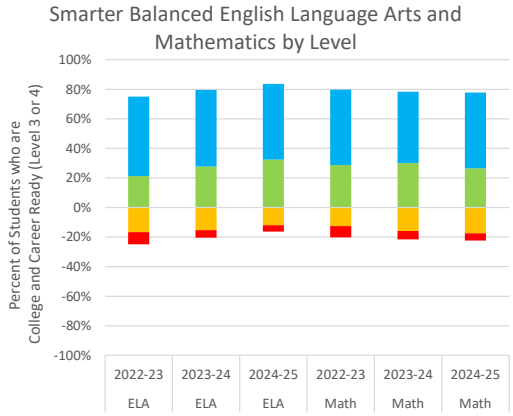
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	7%	10%	13%	16%	17%
*Students with Disabilities	9%	10%	13%	11%	10%
*English Language Learners	9%	4%	5%	3%	1%
*Free-Direct Certification	1%	2%	4%	5%	6%
Black	1%	2%	2%	2%	3%
Latino	8%	5%	5%	7%	8%
Native American					0%
Pacific Islander					0%
Multi-Race - Other Ancestry	2%	2%	3%	4%	5%
Multi-Race - Asian/White	9%	11%	11%	11%	10%
Asian	24%	24%	22%	21%	20%
White	57%	56%	57%	57%	54%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	54%	52%	51%
ELA	Level 3	21%	28%	33%
ELA	Level 2	17%	15%	12%
ELA	Level 1	8%	5%	4%
	ELA Participation	97%	97%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	51%	48%	51%
Math	Level 3	29%	30%	27%
Math	Level 2	13%	16%	18%
Math	Level 1	8%	6%	5%
	Math Participation	97%	97%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Franklin

5405 SE Woodward St
503-916-5140

9-12 *Constructed 1915*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	1835	1788	1622	1612	1578	1523	1475	1389
Spanish Immersion	139	140	148	161	173	187	184	191
Russian Immersion	40	40	41	36	29	23	26	25
Total	**2014**	**1968**	**1811**	**1809**	**1780**	**1733**	**1685**	**1605**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	93.67	92.00	90.00	85.50	80.17	79.84
		Counseling Services	7.00	7.00	6.00	6.00	6.00	5.50
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	2.33	2.00	2.00	2.00	2.00	2.00
		Other	3.00	3.50	3.50	2.66	2.66	2.00
	Classified /Non-Rep	Clerical	12.75	13.50	11.50	10.15	10.30	9.30
		Ed. Assistant/ Paraeducator					0.36	0.51
		Library/Media Services	1.00	1.00	1.00	0.50		
		Other	6.82	5.70	4.88	3.50	3.50	2.00
	Admin.		4.00	4.00	4.00	4.00	5.00	5.00
School Total			**131.57**	**129.70**	**123.88**	**115.31**	**110.99**	**107.15**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	11.50	13.50	13.50	11.50	11.50	11.50
		ESL	2.00	2.50	3.00	3.50	3.50	3.50
		Other	1.00					
	Classified /Non-Rep	Special Education	12.19	12.19	12.19	11.26	14.07	14.07
		ESL	0.87	0.87	0.87	0.87	1.31	1.31
		Nutrition Services	3.50	4.13	4.13	4.13	4.13	4.13
		Custodial	9.73	9.73	10.73	13.00	11.00	11.00
		Other	3.00	4.00	5.00	5.00	4.00	4.00
CASR Total			**43.79**	**46.92**	**49.42**	**49.26**	**49.51**	**49.51**
Grand Total			**175.37**	**176.62**	**173.30**	**164.57**	**160.50**	**156.66**
Overall Students per FTE			11.5:1	11.1:1	10.5:1	11.0:1	11.1:1	11.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	95.44	91.79	89.42	85.30	80.16	75.17
		Gen Fund Equity	7.88	7.71	8.25	7.84	7.00	7.00
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	3.00	5.00	4.83	3.67	4.67	8.17
		Other	0.69	1.00		0.35		
	Classified/ Non-Rep	Gen Fund	11.32	12.83	8.57	8.03	8.26	6.81
		Gen Fund Equity	7.25	5.38	5.50	4.12	3.00	4.00
		Foundation			0.55			
		Title I						
		SIA/M98	2.00	2.00	2.00	2.00	2.00	1.00
		Other			0.76		0.90	
	Admin.	Gen Fund	4.00	4.00	4.00	4.00	5.00	5.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**131.57**	**129.70**	**123.88**	**115.31**	**110.99**	**107.15**

School and CASR	**Licensed**	121.50	121.50	119.00	112.16	106.83	105.34
	Classified/ Non-Rep	49.87	51.12	50.30	48.41	48.67	46.32
	Admin.	4.00	4.00	4.00	4.00	5.00	5.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Franklin

5405 SE Woodward St
503-916-5140

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$10,765,354	$11,126,289	$11,470,770	$11,297,859	$11,344,132	$11,387,720
Associated Payroll Costs	$5,341,323	$5,437,477	$5,739,544	$5,511,602	$6,217,883	$6,502,996
Purchased Services	$ 88,221	$ 77,590	$ 91,009	$ 97,046	$ 71,279	$ 73,668
Supplies and Materials	$ 446,851	$ 491,451	$ 516,982	$ 529,957	$ 66,787	$ 110,921
Capital	$ 12,359	$ 10,471	$ 672	$ 57		
Other Objects	$ 7,915	$ 20,415	$ 2,225	$ 2,242	$ 2,196	$ 2,220
Total	**$16,662,023**	**$17,163,691**	**$17,821,202**	**$17,438,764**	**$17,702,277**	**$18,077,525**
Dollars per Student	**$ 8,273 :1**	**$ 8,721 :1**	**$ 9,841 :1**	**$ 9,640 :1**	**$ 9,945 :1**	**$10,431 :1**

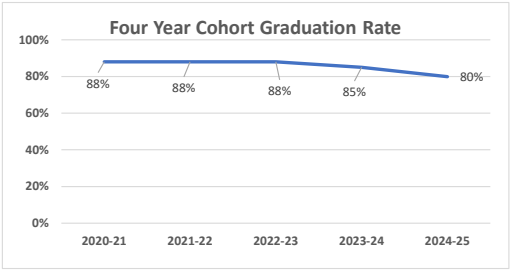
Note: Foundation funding ended after the 2023-24 school year.

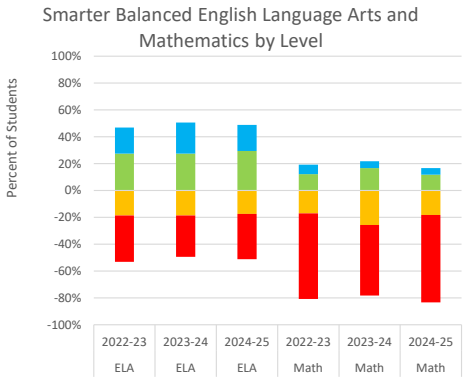
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	1%	10%	18%	29%	43%
*Students with Disabilities	12%	13%	14%	14%	14%
*English Language Learners	6%	7%	8%	10%	10%
*Free-Direct Certification	21%	23%	34%	33%	32%
Black	5%	5%	5%	5%	4%
Latino	19%	20%	20%	20%	20%
Native American	0%	0%	0%	0%	0%
Pacific Islander	1%	1%	1%	1%	1%
Multi-Race - Other Ancestry	6%	6%	6%	6%	6%
Multi-Race - Asian/White	4%	4%	4%	5%	5%
Asian	12%	12%	11%	11%	10%
White	53%	52%	53%	53%	53%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	19%	23%	19%
ELA	Level 3	27%	28%	30%
ELA	Level 2	19%	19%	17%
ELA	Level 1	34%	31%	34%
	ELA Participation	67%	57%	61%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	7%	5%	5%
Math	Level 3	12%	17%	12%
Math	Level 2	17%	26%	18%
Math	Level 1	64%	53%	65%
	Math Participation	59%	45%	52%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



George

10000 N Burr Ave
503-916-6262

Title I School for 2026-27

6-8 Constructed 1950

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	315	268	254	291	249	257	268	275
Spanish Immersion	70	119	113	113	109	120	122	129
Total	**385**	**387**	**367**	**404**	**358**	**377**	**390**	**404**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	22.00	24.70	22.70	21.20	19.71	18.82
		Counseling Services	2.00	2.50	2.00	1.40	1.40	1.00
		Library/Media Services	1.00	1.00	1.00	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention	2.00	1.00	2.00	3.00	2.79	2.56
		Other	2.00	2.50	2.00	2.00	1.80	1.20
	Classified /Non-Rep	Clerical	2.00	3.00	3.00	4.00	4.00	3.90
		Ed. Assistant/ Paraeducator		1.00	1.00	1.00		0.40
		Library/Media Services	0.70					
		Other	1.00	0.60	1.60	0.60		
	Admin.		3.00	3.00	3.00	3.00	3.00	2.00
School Total			**35.70**	**39.30**	**38.30**	**36.70**	**33.20**	**30.38**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	6.50	7.50	7.00	6.00	6.50	6.50
		ESL	1.50	1.80	2.30	2.30	2.50	2.22
		Other	1.00	1.00	1.00	1.00		
	Classified /Non-Rep	Special Education	9.38	9.38	9.38	11.26	12.19	11.26
		ESL	0.44	1.27	1.27	1.27	0.88	
		Nutrition Services	2.25	2.25	2.38	1.69	2.69	1.69
		Custodial	4.00	3.00	4.00	3.73	3.73	3.73
		Other	1.00	1.00	1.00	1.00	1.00	1.00
CASR Total			**26.07**	**27.21**	**28.33**	**28.24**	**29.48**	**26.39**
Grand Total			**61.77**	**66.51**	**66.63**	**64.94**	**62.68**	**56.77**
Overall Students per FTE			6.2:1	5.8:1	5.5:1	6.2:1	5.7:1	6.6:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	18.40	20.05	18.85	22.40	21.40	19.60
		Gen Fund Equity	3.10	2.30	2.80	0.50	0.10	1.88
		Gen Fund K-5 Arts						
		Foundation						
		Title I	2.00	2.35	0.50			0.20
		SIA/M98	5.00	6.50	6.40	5.00	4.40	2.40
		Other	0.50	0.50	1.15	0.20	0.30	
	Classified/ Non-Rep	Gen Fund	2.00	2.50	1.50	1.50	1.50	2.10
		Gen Fund Equity		0.60		1.00		0.12
		Foundation						
		Title I	0.70	0.50	3.10	2.90	2.30	2.08
		SIA/M98			1.00		0.20	
		Other	1.00	1.00		0.20		
	Admin.	Gen Fund	2.00	2.00	2.50	3.00	2.00	2.00
		Gen Fund Equity	1.00	1.00	0.50		1.00	
		Title I						
		Other						
School Total			**35.70**	**39.30**	**38.30**	**36.70**	**33.20**	**30.38**

School and CASR	**Licensed**	38.00	42.00	40.00	37.40	35.20	32.80
	Classified/ Non-Rep	20.77	21.51	23.63	24.54	24.48	21.97
	Admin.	3.00	3.00	3.00	3.00	3.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

George

10000 N Burr Ave
503-916-6262

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,923,525	$3,079,740	$3,373,142	$3,476,666	$3,399,328	$3,139,017
Associated Payroll Costs	$1,413,217	$1,468,014	$1,702,355	$1,725,569	$1,906,001	$1,830,864
Purchased Services	$ 21,141	$ 17,589	$ 49,531	$ 28,131	$ 18,832	$ 15,108
Supplies and Materials	$ 111,063	$ 153,788	$ 88,602	$ 90,813	$ 76,385	$ 25,048
Capital	$ 1,001	$ 1,307	$ 407			
Other Objects		$ 260	$ 1,586		$ 468	$ 456
Total	**$ 4,469,947**	**$ 4,720,698**	**$ 5,215,625**	**$ 5,321,179**	**$ 5,401,014**	**$ 5,010,493**
Dollars per Student	**$ 11,610 :1**	**$ 12,198 :1**	**$ 14,212 :1**	**$ 13,171 :1**	**$ 15,087 :1**	**$ 13,290 :1**

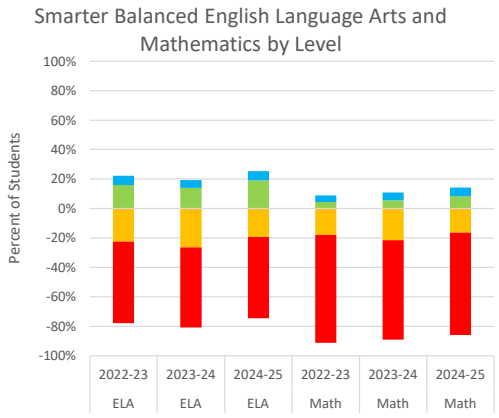
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	51%	54%	56%	63%	81%
*Students with Disabilities	20%	22%	23%	26%	26%
*English Language Learners	22%	26%	26%	25%	30%
*Free-Direct Certification	54%	51%	65%	70%	70%
Black	21%	21%	19%	20%	17%
Latino	41%	46%	44%	43%	47%
Native American	1%	1%	1%	1%	0%
Pacific Islander	2%	1%	2%	1%	1%
Multi-Race - Other Ancestry	12%	9%	9%	10%	13%
Multi-Race - Asian/White	1%	1%	1%	1%	0%
Asian	3%	1%	3%	2%	3%
White	20%	20%	21%	23%	20%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	6%	5%	6%
ELA	Level 3	16%	14%	19%
ELA	Level 2	23%	26%	19%
ELA	Level 1	55%	54%	55%
	ELA Participation	98%	94%	95%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	4%	5%	6%
Math	Level 3	4%	6%	8%
Math	Level 2	18%	22%	17%
Math	Level 1	73%	68%	69%
	Math Participation	98%	92%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Glencoe

825 SE 51st Ave
503-916-6207

K-5 Constructed 1923

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	373	394	372	356	339	328	314	295
Total	**373**	**394**	**372**	**356**	**339**	**328**	**314**	**295**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	21.20	19.70	19.20	16.20	15.20	15.20
		Counseling Services	1.50	1.50	1.50	1.60	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention			1.00	2.00	1.50	1.50
		Other						
	Classified /Non-Rep	Clerical	1.75	1.75	1.75	1.75	1.50	1.50
		Ed. Assistant/ Paraeducator			0.60			0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**26.45**	**24.95**	**26.05**	**23.15**	**20.80**	**21.20**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.50	2.70	2.50	1.00	1.00	1.00
		ESL	0.25	0.25	0.50	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	2.81	2.81	1.88			
		ESL						
		Nutrition Services	1.00	1.00	1.00	1.00	1.31	1.31
		Custodial	3.00	3.00	3.00	2.00	2.73	2.73
		Other			0.88	0.88	0.88	
CASR Total			**8.56**	**9.76**	**9.75**	**5.13**	**6.16**	**5.29**
Grand Total			**35.01**	**34.71**	**35.80**	**28.28**	**26.96**	**26.49**
Overall Students per FTE			10.7:1	11.3:1	10.4:1	12.6:1	12.6:1	12.4:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	18.70	18.70	18.00	17.60	15.60	15.60
		Gen Fund Equity	1.00		1.00	0.50		0.50
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation		0.50	0.30	0.10		
		Title I						
		SIA/M98	2.50	0.50	1.50	1.00	1.50	1.00
		Other		1.00	0.40			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation	0.25	0.25	0.45	0.25		
		Title I						
		SIA/M98						
		Other			0.40			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**26.45**	**24.95**	**26.05**	**23.15**	**20.80**	**21.20**

School and CASR	**Licensed**	24.95	24.65	25.20	21.65	19.55	19.55
	Classified/ Non-Rep	9.06	9.06	9.60	5.63	6.41	5.94
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Glencoe

825 SE 51st Ave
503-916-6207

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,313,864	$2,266,963	$2,462,333	$2,393,207	$2,223,551	$2,282,776
Associated Payroll Costs	$1,097,378	$1,088,018	$1,174,289	$1,137,721	$1,178,465	$1,267,072
Purchased Services	$ 7,000	$ 7,011	$ 10,412	$ 11,960	$ 13,788	$ 13,632
Supplies and Materials	$ 32,686	$ 32,803	$ 33,334	$ 51,447	$ 13,716	$ 13,608
Capital	$ 1,608	$ 221	$ 37	$ 16		
Other Objects	$ 150				$ 420	$ 408
Total	**$ 3,452,686**	**$ 3,395,017**	**$ 3,680,405**	**$ 3,594,352**	**$ 3,429,940**	**$ 3,577,496**
Dollars per Student	**$ 9,257 :1**	**$ 8,617 :1**	**$ 9,894 :1**	**$ 10,096 :1**	**$ 10,118 :1**	**$ 10,907 :1**

Note: Foundation funding ended after the 2023-24 school year.

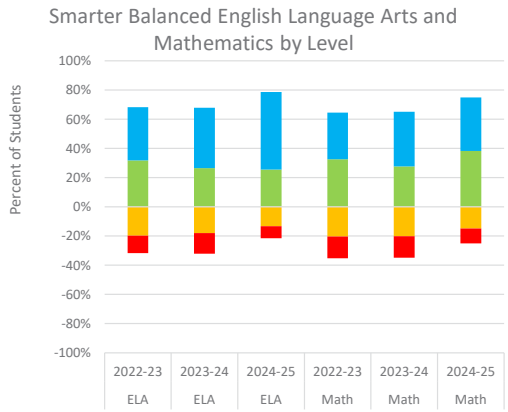
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	18%	22%	27%	30%	31%
*Students with Disabilities	18%	18%	18%	15%	16%
*English Language Learners	3%	3%	4%	3%	3%
*Free-Direct Certification	10%	14%	16%	14%	17%
Black	3%	5%	5%	5%	5%
Latino	10%	10%	9%	12%	11%
Native American					
Pacific Islander			0%	0%	
Multi-Race - Other Ancestry	5%	6%	3%	4%	4%
Multi-Race - Asian/White	7%	6%	5%	5%	5%
Asian	3%	2%	2%	1%	1%
White	72%	71%	76%	74%	74%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: losing neighborhood students to Vestal.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	37%	41%	53%
ELA	Level 3	32%	27%	26%
ELA	Level 2	20%	18%	13%
ELA	Level 1	12%	14%	8%
	ELA Participation	97%	98%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	32%	38%	37%
Math	Level 3	33%	28%	38%
Math	Level 2	20%	20%	15%
Math	Level 1	15%	15%	10%
	Math Participation	96%	98%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Grant

3905 SE 91st Ave
503-916-5160

9-12 Reconstructed 2019

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	1849	1873	1892	1875	1809	1759	1683	1582
Japanese Immersion	277	286	286	274	265	260	253	241
Total	**2126**	**2159**	**2178**	**2149**	**2074**	**2019**	**1936**	**1823**

New building opened 2019-20 SY.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	84.97	92.90	93.49	94.66	88.82	85.66
		Counseling Services	7.00	7.00	7.00	8.00	7.00	6.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	3.00	1.00	1.00	1.67	1.67	1.50
		Other	2.45	1.00	1.00	1.00	1.00	1.00
	Classified /Non-Rep	Clerical	8.50	8.63	9.63	8.80	9.00	9.00
		Ed. Assistant/ Paraeducator						
		Library/Media Services	1.00	1.00	1.00			
		Other	4.50	5.00	5.00	4.00	3.72	2.00
	Admin.		4.00	4.00	4.00	4.00	5.00	5.00
School Total			**116.41**	**121.52**	**123.11**	**123.13**	**117.21**	**111.16**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	10.00	11.60	13.30	11.00	11.00	11.00
		ESL	0.25	0.25	0.50	0.50	0.50	0.50
		Other	1.00					
	Classified /Non-Rep	Special Education	19.64	19.64	18.70	18.70	18.70	18.70
		ESL	0.44					
		Nutrition Services	2.13	2.00	2.00	2.81	2.88	2.88
		Custodial	13.00	17.73	18.45	13.73	9.73	9.73
		Other	2.50	3.50	4.00	3.00	3.00	3.00
CASR Total			**48.95**	**54.71**	**56.95**	**49.74**	**45.80**	**45.80**
Grand Total			**165.36**	**176.23**	**180.06**	**172.87**	**163.01**	**156.96**
Overall Students per FTE			12.9:1	12.3:1	12.1:1	12.4:1	12.7:1	12.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	93.91	98.56	98.29	97.16	91.32	88.00
		Gen Fund Equity				5.00	4.00	3.66
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	4.00	4.00	4.67	4.17	4.18	3.50
		Other	0.50	0.33	0.53			
	Classified/ Non-Rep	Gen Fund	12.00	12.63	13.63	10.72	10.72	9.00
		Gen Fund Equity						
		Foundation				0.08		
		Title I						
		SIA/M98	2.00	2.00	2.00	2.00	2.00	2.00
		Other						
	Admin.	Gen Fund	4.00	4.00	4.00	4.00	5.00	5.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**116.41**	**121.52**	**123.11**	**123.13**	**117.21**	**111.16**

School and CASR	**Licensed**	109.66	114.75	117.29	117.83	110.99	106.66
	Classified/ Non-Rep	51.70	57.49	58.77	51.04	47.02	45.30
	Admin.	4.00	4.00	4.00	4.00	5.00	5.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Grant

3905 SE 91st Ave
503-916-5160

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$9,731,201	$10,620,971	$11,540,128	$12,345,423	$11,757,862	$11,378,600
Associated Payroll Costs	$4,527,952	$4,906,251	$5,433,096	$5,797,039	$6,403,547	$6,461,595
Purchased Services	$ 33,023	$ 73,460	$ 415,549	$ 84,101	$ 296,444	$ 315,831
Supplies and Materials	$ 717,787	$ 979,320	$1,023,084	$ 842,023	$ 73,092	$ 137,603
Capital	$ 1,610	$ 61,482	$ 3,678	$ 10,971		
Other Objects	$ 1,200	$ 1,567	$ 18,625	$ 5,609	$ 2,532	$ 2,508
Total	**$15,012,773**	**$16,643,050**	**$18,434,161**	**$19,085,167**	**$18,533,477**	**$18,296,137**
Dollars per Student	**$ 7,062 :1**	**$ 7,709 :1**	**$ 8,464 :1**	**$ 8,881 :1**	**$ 8,936 :1**	**$ 9,062 :1**

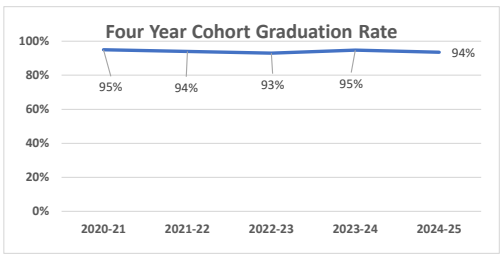
Note: Foundation funding ended after the 2023-24 school year.

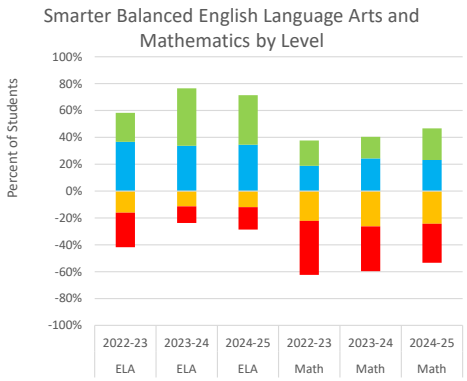
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	1%	6%	10%	14%	19%
*Students with Disabilities	8%	9%	9%	9%	9%
*English Language Learners			1%	1%	1%
*Free-Direct Certification	8%	7%	13%	13%	13%
Black	6%	6%	6%	6%	6%
Latino	7%	7%	8%	8%	9%
Native American	0%	0%	0%	0%	0%
Pacific Islander	0%	0%	0%		0%
Multi-Race - Other Ancestry	5%	6%	6%	5%	5%
Multi-Race - Asian/White	8%	9%	9%	9%	11%
Asian	3%	3%	3%	3%	3%
White	70%	69%	68%	68%	67%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	22%	43%	37%
ELA	Level 3	37%	34%	35%
ELA	Level 2	16%	11%	12%
ELA	Level 1	26%	12%	17%
	ELA Participation	75%	81%	76%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	19%	16%	24%
Math	Level 3	19%	24%	23%
Math	Level 2	22%	26%	24%
Math	Level 1	40%	33%	29%
	Math Participation	65%	62%	74%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Gray

5505 SW 23rd Ave
503-916-5676

The Oregon Department of Education has identified this school as a Targeted Supports for Improvement (TSI) school.

6-8 Constructed 1951

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	478	483	472	438	432	433	431	409
Total	**478**	**483**	**472**	**438**	**432**	**433**	**431**	**409**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	22.50	19.50	20.50	19.40	18.75	18.60
		Counseling Services	2.00	2.00	2.00	2.00	1.00	2.00
		Library/Media Services	0.50	1.00	1.00	0.80	1.00	0.50
		Instructional Spec/ Coach/ Intervention			1.00	1.80	1.00	0.40
		Other	0.85	1.00	2.00	1.00	1.00	0.50
	Classified /Non-Rep	Clerical	2.00	1.92	3.00	2.00	1.90	2.00
		Ed. Assistant/ Paraeducator						0.70
		Library/Media Services	0.50					
		Other						
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**30.35**	**27.42**	**31.50**	**29.00**	**26.65**	**26.70**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.00	4.30	4.30	3.50	3.50	3.50
		ESL	0.25	0.25	0.50	0.50	0.50	0.50
		Other						
	Classified /Non-Rep	Special Education	5.63	5.63	4.69	3.75	2.81	2.81
		ESL						
		Nutrition Services	0.75	0.75	0.94	1.00	1.00	1.00
		Custodial	3.00	3.00	2.00	3.00	3.00	3.00
		Other			1.00		0.40	0.40
CASR Total			**13.63**	**13.93**	**13.43**	**11.75**	**11.21**	**11.21**
Grand Total			**43.98**	**41.35**	**44.93**	**40.75**	**37.86**	**37.91**
Overall Students per FTE			10.9:1	11.7:1	10.5:1	10.7:1	11.4:1	11.4:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	24.85	20.00	25.00	21.90	20.35	20.30
		Gen Fund Equity				0.50	0.50	0.30
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	1.00	1.50	1.00	2.60	1.90	1.40
		Other		2.00	0.50			
	Classified/ Non-Rep	Gen Fund	2.30	1.50	2.50	1.90	1.50	1.90
		Gen Fund Equity						0.40
		Foundation	0.20	0.42		0.10		
		Title I						
		SIA/M98						
		Other			0.50		0.40	0.40
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**30.35**	**27.42**	**31.50**	**29.00**	**26.65**	**26.70**

School and CASR	**Licensed**	30.10	28.05	31.30	29.00	26.75	26.00
	Classified/ Non-Rep	11.88	11.30	11.63	9.75	9.11	9.91
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Gray

5505 SW 23rd Ave
503-916-5676

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,512,322	$2,496,100	$2,900,540	$2,994,800	$2,805,199	$2,795,555
Associated Payroll Costs	$1,251,747	$1,160,249	$1,370,880	$1,382,791	$1,512,860	$1,576,725
Purchased Services	$ 18,322	$ 16,183	$ 13,393	$ 20,336	$ 20,583	$ 16,884
Supplies and Materials	$ 47,299	$ 27,331	$ 26,419	$ 47,246	$ 16,512	$ 36,342
Capital	$ 1,890	$ 468	$ 175			
Other Objects			$ 886		$ 504	$ 504
Total	**$ 3,831,582**	**$ 3,700,331**	**$ 4,312,294**	**$ 4,445,172**	**$ 4,355,658**	**$ 4,426,010**
Dollars per Student	**$ 8,016 :1**	**$ 7,661 :1**	**$ 9,136 :1**	**$ 10,149 :1**	**$ 10,083 :1**	**$ 10,222 :1**

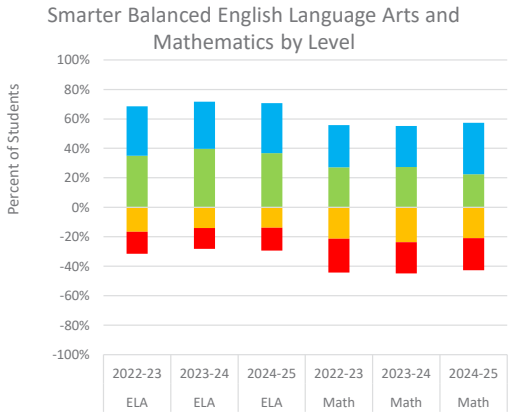
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	17%	18%	23%	29%	32%
*Students with Disabilities	15%	14%	15%	18%	14%
*English Language Learners	1%	2%	4%	4%	5%
*Free-Direct Certification	8%	12%	20%	20%	20%
Black	2%	4%	3%	4%	4%
Latino	8%	8%	9%	11%	11%
Native American					1%
Pacific Islander		0%	0%	0%	0%
Multi-Race - Other Ancestry	5%	5%	5%	5%	5%
Multi-Race - Asian/White	8%	6%	5%	5%	6%
Asian	3%	3%	3%	3%	3%
White	74%	74%	74%	73%	70%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	34%	32%	34%
ELA	Level 3	35%	40%	37%
ELA	Level 2	17%	14%	14%
ELA	Level 1	15%	14%	16%
	ELA Participation	95%	96%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	29%	28%	35%
Math	Level 3	27%	27%	22%
Math	Level 2	21%	24%	21%
Math	Level 1	23%	21%	22%
	Math Participation	94%	96%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



Grout

3119 SE Holgate Blvd
503-916-6209

Title I School for 2026-27

K-5 *Constructed 1927*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	340	316	302	294	327	305	298	295
Total	**340**	**316**	**302**	**294**	**327**	**305**	**298**	**295**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	16.70	15.50	14.00	13.80	13.70	13.60
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.50	0.60	0.60
		Instructional Spec/ Coach/ Intervention	1.00	2.00	2.50	2.00	1.50	1.00
		Other	1.00	0.80	0.80	2.00	2.00	2.00
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	1.75	3.88	1.69	3.07	3.07	3.03
		Library/Media Services	0.50	0.50	0.50			
		Other	1.00	0.94	0.94			0.94
	Admin.		2.00	2.00	2.00	2.00	2.00	1.50
School Total			**27.45**	**29.12**	**25.93**	**26.37**	**25.87**	**25.67**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.50	4.20	4.20	3.00	3.00	3.00
		ESL	1.00	1.00	1.50	2.00	2.00	2.00
		Other		1.00		2.00	2.00	2.00
	Classified /Non-Rep	Special Education	7.50	6.57	6.57	5.63	6.57	6.57
		ESL	0.44		0.44	0.44	0.44	
		Nutrition Services	2.06	2.06	2.06	1.56	1.56	1.56
		Custodial	4.00	3.00	3.00	3.00	3.00	3.00
		Other				2.75	2.75	2.75
CASR Total			**18.51**	**17.83**	**17.77**	**20.38**	**21.32**	**20.88**
Grand Total			**45.96**	**46.95**	**43.70**	**46.75**	**47.18**	**46.55**
Overall Students per FTE			7.4:1	6.7:1	6.9:1	6.3:1	6.9:1	6.6:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	14.70	15.50	14.50	14.30	14.40	14.40
		Gen Fund Equity	0.50	1.30	1.30	1.00	0.30	
		Gen Fund K-5 Arts	1.00	1.00	0.50	1.00	0.90	0.80
		Foundation						
		Title I			0.50		0.20	
		SIA/M98	4.00	2.00	2.00	2.50	2.50	2.75
		Other				0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	1.50	2.38	1.90
		Gen Fund Equity	1.60	1.00				0.60
		Foundation						
		Title I	1.36	3.44	2.05	1.58	0.94	1.71
		SIA/M98				1.75	1.75	1.75
		Other	0.30	0.88	1.08	0.24		
	Admin.	Gen Fund	1.50	1.50	1.50	2.00	1.50	1.00
		Gen Fund Equity	0.50	0.50	0.50		0.50	0.50
		Title I						
		Other						
School Total			**27.45**	**29.12**	**25.93**	**26.37**	**25.87**	**25.67**

School and CASR	**Licensed**	24.70	26.00	24.50	26.30	25.80	25.20
	Classified/ Non-Rep	19.26	18.95	17.20	18.45	19.38	19.85
	Admin.	2.00	2.00	2.00	2.00	2.00	1.50

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Grout

3119 SE Holgate Blvd
503-916-6209



Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,052,197	$2,307,707	$2,474,474	$2,435,344	$2,537,815	$2,461,680
Associated Payroll Costs	$1,011,812	$1,091,306	$1,136,748	$1,235,685	$1,420,627	$1,437,720
Purchased Services	$ 32,452	$ 19,571	$ 17,974	$ 20,984	$ 12,408	$ 12,924
Supplies and Materials	$ 20,305	$ 66,250	$ 38,160	$ 66,630	$ 68,742	$ 13,056
Capital		$ 710				
Other Objects	$ 564	$ 855		$ 213	$ 372	$ 384
Total	**$ 3,117,330**	**$ 3,486,400**	**$ 3,667,355**	**$ 3,758,857**	**$ 4,039,963**	**$ 3,925,764**
Dollars per Student	**$ 9,169 :1**	**$ 11,033 :1**	**$ 12,144 :1**	**$ 12,785 :1**	**$ 12,355 :1**	**$ 12,871 :1**

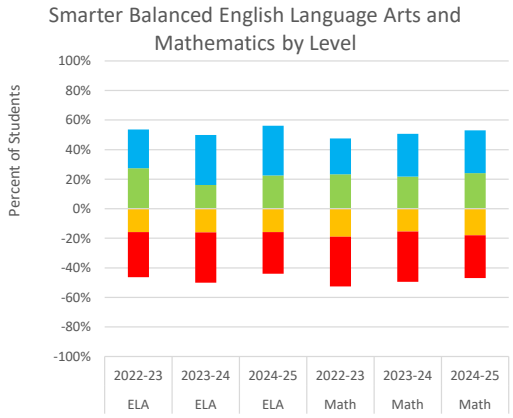
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	35%	39%	45%	53%	65%
*Students with Disabilities	19%	21%	21%	23%	23%
*English Language Learners	11%	17%	20%	19%	24%
*Free-Direct Certification	33%	37%	44%	47%	51%
Black	7%	4%	4%	5%	6%
Latino	9%	12%	18%	18%	17%
Native American		1%	1%	1%	1%
Pacific Islander	2%	2%	2%	1%	2%
Multi-Race - Other Ancestry	8%	7%	7%	11%	10%
Multi-Race - Asian/White	4%	4%	4%	4%	4%
Asian	9%	12%	10%	10%	10%
White	62%	58%	55%	51%	50%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	26%	34%	34%
ELA	Level 3	28%	16%	23%
ELA	Level 2	16%	16%	16%
ELA	Level 1	30%	34%	28%
	ELA Participation	97%	98%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	24%	29%	29%
Math	Level 3	23%	22%	24%
Math	Level 2	19%	15%	18%
Math	Level 1	34%	34%	29%
	Math Participation	97%	98%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Harriet Tubman

2231 N Flint Ave
503-916-5630

Title I School for 2026-27

6-8 Constructed 1952

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	353	332	288	285	354	380	401	349
Mandarin Immersion	35	29	32	43	48	57	50	54
Total	**388**	**361**	**320**	**328**	**402**	**437**	**451**	**403**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	23.70	22.70	20.70	19.50	18.63	18.60
		Counseling Services	2.00	2.00	2.00	2.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention	2.50	2.00	2.00	3.50	1.80	1.40
		Other	0.80	2.80	3.30	1.00	0.50	0.50
	Classified /Non-Rep	Clerical	2.50	3.50	3.00	3.00	3.33	3.33
		Ed. Assistant/ Paraeducator	2.50	2.00	1.00		1.75	0.40
		Library/Media Services						
		Other				1.00	1.00	2.75
	Admin.		3.50	3.00	2.00	3.00	3.00	3.00
School Total			**38.50**	**39.00**	**35.00**	**33.50**	**31.50**	**31.48**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.00	4.00	3.80	2.50	3.00	3.00
		ESL	0.50	0.50	0.50	0.50	0.50	0.50
		Other	1.00	1.50	1.00	1.00		
	Classified /Non-Rep	Special Education	6.57	5.63	4.69	3.75	2.81	2.81
		ESL						
		Nutrition Services	1.75	1.75	1.75	1.25	1.38	1.38
		Custodial	4.00	4.00	5.00	4.00	4.00	4.00
		Other	1.00	1.00	1.00	1.00	1.00	1.00
CASR Total			**18.82**	**18.38**	**17.74**	**14.00**	**12.69**	**12.69**
Grand Total			**57.32**	**57.38**	**52.74**	**47.50**	**44.19**	**44.17**
Overall Students per FTE			6.8:1	6.3:1	6.1:1	6.9:1	9.1:1	9.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	21.50	20.00	17.90	18.90	18.95	20.01
		Gen Fund Equity	3.00	3.00	2.50	1.60	0.18	0.18
		Gen Fund K-5 Arts						
		Foundation						
		Title I	0.50	1.00	1.45		0.50	0.20
		SIA/M98	4.50	6.00	6.25	5.50	2.80	1.62
		Other	0.50	0.50	0.90	0.50		
	Classified/ Non-Rep	Gen Fund	3.50	4.50	2.50	2.40	3.35	3.49
		Gen Fund Equity				0.20	1.33	1.33
		Foundation						
		Title I	1.50	1.00	0.50	1.40	0.40	0.68
		SIA/M98			1.00		1.00	0.98
		Other						
	Admin.	Gen Fund	3.00	3.00	2.00	3.00	3.00	3.00
		Gen Fund Equity						
		Title I						
		Other	0.50					
School Total			**38.50**	**39.00**	**35.00**	**33.50**	**31.50**	**31.48**

School and CASR	**Licensed**	35.50	36.50	34.30	30.50	25.93	25.50
	Classified/ Non-Rep	18.32	17.88	16.44	14.00	15.27	15.67
	Admin.	3.50	3.00	2.00	3.00	3.00	3.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Harriet Tubman

2231 N Flint Ave
503-916-5630

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,962,002	$3,104,034	$3,036,365	$3,361,669	$3,010,781	$3,144,197
Associated Payroll Costs	$1,406,344	$1,457,795	$1,459,011	$1,428,698	$1,671,611	$1,799,285
Purchased Services	$ 12,972	$ 92,673	$ 59,307	$ 22,895	$ 43,169	$ 17,088
Supplies and Materials	$ 66,018	$ 79,001	$ 90,658	$ 115,757	$ 71,456	$ 53,701
Capital		$ 26				
Other Objects	$ 65	$ 315	$ 454		$ 432	$ 516
Total	**$ 4,447,401**	**$ 4,733,844**	**$ 4,645,794**	**$ 4,929,020**	**$ 4,797,449**	**$ 5,014,787**
Dollars per Student	**$ 11,462 :1**	**$ 13,113 :1**	**$ 14,518 :1**	**$ 15,028 :1**	**$ 11,934 :1**	**$ 11,475 :1**

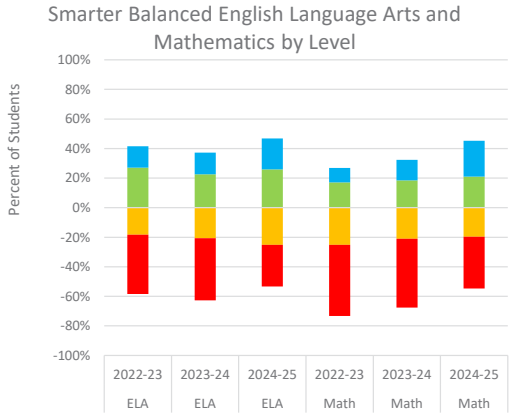
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	32%	38%	40%	40%	45%
*Students with Disabilities	14%	18%	17%	14%	13%
*English Language Learners	6%	5%	5%	5%	4%
*Free-Direct Certification	34%	35%	38%	40%	37%
Black	32%	34%	28%	23%	25%
Latino	13%	16%	18%	18%	16%
Native American	1%	0%	0%	0%	1%
Pacific Islander	0%	1%	0%		
Multi-Race - Other Ancestry	10%	8%	9%	9%	9%
Multi-Race - Asian/White	4%	4%	4%	5%	4%
Asian	1%	1%	2%	3%	2%
White	39%	37%	39%	42%	43%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	14%	15%	21%
ELA	Level 3	27%	23%	26%
ELA	Level 2	18%	21%	25%
ELA	Level 1	40%	42%	28%
	ELA Participation	67%	85%	92%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	10%	14%	24%
Math	Level 3	17%	19%	21%
Math	Level 2	25%	21%	20%
Math	Level 1	48%	47%	35%
	Math Participation	72%	82%	90%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Harrison Park

2225 SE 87th Ave
503-916-5700

Title I School for 2026-27

6-8 Constructed 1949

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	457	474	241	278	308	333	340	332
Mandarin Immersion	72	101	80	94	111	109	92	89
Total	**529**	**575**	**321**	**372**	**419**	**442**	**432**	**421**

2023-24, Converted to 6-8 from K-8. Gained Mandarin Immersion

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	37.75	33.90	20.56	22.67	20.75	22.10
		Counseling Services	2.00	2.00	2.00	1.60	2.00	2.00
		Library/Media Services	1.00	1.00	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention	1.00	1.00	2.50	3.00	2.70	0.90
		Other	1.00	4.00	1.50	1.00	1.50	1.50
	Classified /Non-Rep	Clerical	3.00	2.75	3.00	3.00	2.00	1.75
		Ed. Assistant/ Paraeducator	3.50	5.26			0.88	1.28
		Library/Media Services				0.50		
		Other	1.75	2.75	0.88			
	Admin.		2.00	2.00	3.00	3.00	2.00	2.00
School Total			**53.01**	**54.66**	**33.94**	**35.27**	**32.33**	**32.03**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.00	4.10	2.10	1.50	2.00	2.00
		ESL	4.00	4.00	2.44	1.72	2.00	1.50
		Other			1.00			
	Classified /Non-Rep	Special Education	3.75	1.88				
		ESL	1.75	1.75			0.44	
		Nutrition Services	2.56	3.50	3.50	1.69	1.69	1.69
		Custodial	4.00	5.00	3.00	3.00	4.00	4.00
		Other	2.88	2.88	2.00	2.00	1.00	1.00
CASR Total			**22.94**	**23.10**	**14.04**	**9.91**	**11.13**	**10.19**
Grand Total			**75.95**	**77.76**	**47.98**	**45.17**	**43.45**	**42.21**
Overall Students per FTE			7.0:1	7.4:1	6.7:1	8.2:1	9.6:1	10.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	33.95	32.85	17.68	23.95	21.10	22.70
		Gen Fund Equity	4.25	4.25	2.50		1.30	1.40
		Gen Fund K-5 Arts	1.00	0.50				
		Foundation						
		Title I	1.32		0.31	0.70	0.80	0.10
		SIA/M98	1.50	4.00	5.75	3.80	4.20	2.40
		Other	0.73	0.30	0.83	0.32	0.05	0.40
	Classified/ Non-Rep	Gen Fund	2.00	3.20	2.00	1.50	1.50	1.95
		Gen Fund Equity	1.00	0.50		0.20	0.40	0.20
		Foundation						
		Title I	3.76	4.63	0.88	0.80	0.98	0.88
		SIA/M98			1.00	1.00		
		Other	1.50	2.43				
	Admin.	Gen Fund	2.00	2.00	3.00	2.00	2.00	2.00
		Gen Fund Equity				1.00		
		Title I						
		Other						
School Total			**53.01**	**54.66**	**33.94**	**35.27**	**32.33**	**32.03**

School and CASR	**Licensed**	50.75	50.00	32.60	31.99	31.45	30.50
	Classified/ Non-Rep	23.20	25.76	12.38	10.19	10.00	9.71
	Admin.	2.00	2.00	3.00	3.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Harrison Park

2225 SE 87th Ave
503-916-5700

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,764,487	$4,054,961	$3,118,277	$3,436,894	$3,225,340	$3,352,535
Associated Payroll Costs	$1,866,302	$2,028,251	$1,564,130	$1,687,956	$1,811,314	$1,935,341
Purchased Services	$ 43,419	$ 20,224	$ 17,664	$ 29,521	$ 34,850	$ 17,148
Supplies and Materials	$ 86,824	$ 113,242	$ 75,379	$ 72,700	$ 74,777	$ 32,899
Capital	$ 280			$ 1,057		
Other Objects	$ 110	$ 1,085	$ 235	$ 85	$ 480	$ 516
Total	**$ 5,761,422**	**$ 6,217,764**	**$ 4,775,685**	**$ 5,228,214**	**$ 5,146,761**	**$ 5,338,439**
Dollars per Student	**$ 10,891 :1**	**$ 10,814 :1**	**$ 14,878 :1**	**$ 14,054 :1**	**$ 12,283 :1**	**$ 12,078 :1**

Note: Foundation funding ended after the 2023-24 school year.

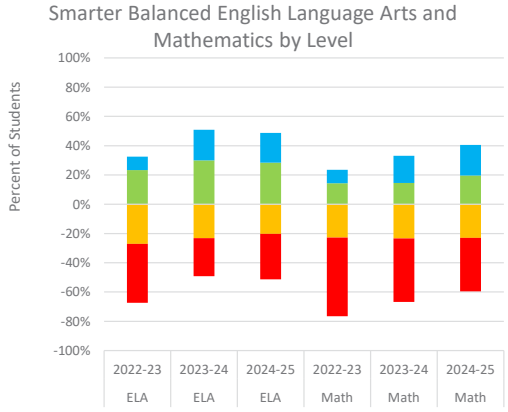
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	37%	46%	42%	45%	54%
*Students with Disabilities	15%	14%	15%	12%	10%
*English Language Learners	32%	35%	19%	17%	18%
*Free-Direct Certification	47%	49%	56%	52%	46%
Black	24%	24%	15%	13%	13%
Latino	13%	16%	17%	14%	15%
Native American	1%	1%	1%	1%	0%
Pacific Islander	4%	6%	5%	3%	3%
Multi-Race - Other Ancestry	12%	10%	8%	8%	6%
Multi-Race - Asian/White	2%	3%	4%	5%	6%
Asian	24%	23%	23%	22%	22%
White	21%	18%	27%	34%	36%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: losing neighborhood students to Mt Tabor. School changed to 6-8 only. K-5 students moved to Clark. Gained Mandarin Immersion from Hosford.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	9%	21%	20%
ELA	Level 3	23%	30%	29%
ELA	Level 2	27%	23%	20%
ELA	Level 1	40%	26%	31%
	ELA Participation	99%	96%	95%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	9%	19%	21%
Math	Level 3	14%	15%	20%
Math	Level 2	23%	23%	23%
Math	Level 1	54%	43%	37%
	Math Participation	98%	96%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Hayhurst

5037 SW Iowa St.
503-916-6300

K-5 *Hayhurst constructed 1954*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	351	350	335	314	290	284	276	273
Odyssey Program								
Total	**351**	**350**	**335**	**314**	**290**	**284**	**276**	**273**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	17.20	15.75	15.50	15.60	13.80	13.60
		Counseling Services	1.00	1.50	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention			1.00	2.00	1.50	
		Other	0.50	1.00	1.00	0.60	1.00	1.50
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	2.00	1.50	1.50
		Ed. Assistant/ Paraeducator	0.30	1.25	1.35	1.55	0.50	0.65
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		2.00	2.00	2.00	2.00	1.00	1.00
School Total			**23.50**	**24.00**	**24.35**	**25.35**	**20.90**	**19.85**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.00	5.00	4.80	4.00	4.00	4.00
		ESL	0.50	0.25	0.50	1.00	1.00	0.50
		Other						
	Classified /Non-Rep	Special Education	8.44	8.44	6.57	6.57	7.50	6.57
		ESL						
		Nutrition Services	0.88	1.00	1.69	1.44	1.25	1.25
		Custodial	2.00	2.00	2.00	2.00	2.00	2.00
		Other						
CASR Total			**15.82**	**16.69**	**15.55**	**15.00**	**15.75**	**14.32**
Grand Total			**39.32**	**40.69**	**39.91**	**40.36**	**36.65**	**34.17**
Overall Students per FTE			8.9:1	8.6:1	8.4:1	7.8:1	7.9:1	8.3:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.70	15.50	16.50	15.60	15.00	14.40
		Gen Fund Equity			0.50	0.50	0.50	0.50
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	0.90	0.80
		Foundation				0.50		
		Title I						
		SIA/M98	4.50	2.00	0.50	2.00	1.50	1.00
		Other		0.25	0.50			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	1.50	2.00	2.15
		Gen Fund Equity	0.20	1.00	0.60			
		Foundation				1.50		
		Title I						
		SIA/M98						
		Other	0.10	0.25	0.75	0.55		
	Admin.	Gen Fund	1.00	1.00	1.50	2.00	1.00	1.00
		Gen Fund Equity	1.00		0.50			
		Title I						
		Other		1.00				
School Total			**23.50**	**24.00**	**24.35**	**25.35**	**20.90**	**19.85**

School and CASR	**Licensed**	23.70	24.00	24.30	24.80	22.90	21.20
	Classified/ Non-Rep	13.62	14.69	13.61	13.56	12.75	11.97
	Admin.	2.00	2.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Hayhurst

5037 SW Iowa St.
503-916-6300

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,811,296	$1,850,619	$2,139,397	$2,225,576	$1,964,544	$1,814,379
Associated Payroll Costs	$ 849,522	$ 875,185	$1,058,720	$1,065,939	$1,105,206	$1,077,825
Purchased Services	$ 5,349	$ 7,142	$ 6,581	$ 28,741	$ 1,421	$ 3,887
Supplies and Materials	$ 21,057	$ 20,869	$ 16,247	$ 24,666	$ 1,401	$ (1,451)
Capital						
Other Objects					$ 372	$ 372
Total	**$ 2,687,224**	**$ 2,753,814**	**$ 3,220,945**	**$ 3,344,922**	**$ 3,072,944**	**$ 2,895,012**
Dollars per Student	**$ 7,656 :1**	**$ 7,868 :1**	**$ 9,615 :1**	**$ 10,653 :1**	**$ 10,596 :1**	**$ 10,194 :1**

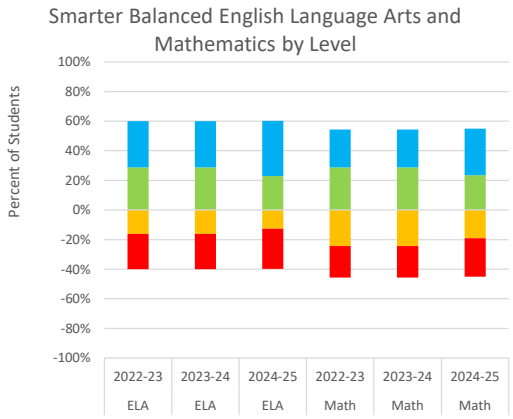
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	25%	31%	35%	40%	44%
*Students with Disabilities	14%	16%	19%	17%	24%
*English Language Learners	4%	6%	9%	10%	8%
*Free-Direct Certification	18%	21%	30%	31%	26%
Black	4%	7%	7%	5%	6%
Latino	9%	8%	11%	12%	13%
Native American	0%	1%	1%	1%	1%
Pacific Islander	1%			1%	1%
Multi-Race - Other Ancestry	7%	8%	8%	9%	9%
Multi-Race - Asian/White	5%	6%	6%	7%	8%
Asian	2%	1%	2%	3%	2%
White	72%	69%	66%	63%	62%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	31%	31%	37%
ELA	Level 3	29%	29%	23%
ELA	Level 2	16%	16%	13%
ELA	Level 1	24%	24%	27%
ELA Participation				

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	26%	26%	31%
Math	Level 3	29%	29%	23%
Math	Level 2	24%	24%	19%
Math	Level 1	21%	21%	26%
Math Participation				



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Hosford

2303 SE 28th Place
503-916-5640

6-8 Constructed 1925

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	513	470	517	537	528	524	476	439
Mandarin Immersion	116	96						
Total	**629**	**566**	**517**	**537**	**528**	**524**	**476**	**439**

2023-24, Removed Mandarin Immersion

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	30.25	24.00	23.50	24.00	23.50	22.95
		Counseling Services	3.00	3.00	2.00	2.00	2.00	1.60
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention			1.50	2.00	1.40	0.80
		Other	1.00	1.00	1.00	1.00	1.00	1.00
	Classified /Non-Rep	Clerical	3.00	3.00	2.50	1.70	1.70	1.50
		Ed. Assistant/ Paraeducator						0.40
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	
		Other	0.50	0.50	0.50	0.50	0.50	
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**40.75**	**34.50**	**34.00**	**34.20**	**33.10**	**30.75**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.50	4.80	4.30	3.50	4.00	3.00
		ESL	1.00	0.50	0.50	0.50	0.50	1.00
		Other						
	Classified /Non-Rep	Special Education	2.81	2.81	4.69	4.69	4.69	4.69
		ESL						
		Nutrition Services	1.50	2.13	2.19	1.63	1.63	1.63
		Custodial	3.00	4.00	4.00	4.00	3.73	3.73
		Other			1.00	1.00	1.00	1.00
CASR Total			**11.81**	**14.24**	**16.68**	**15.32**	**15.54**	**15.04**
Grand Total			**52.56**	**48.74**	**50.68**	**49.52**	**48.64**	**45.79**
Overall Students per FTE			12.0:1	11.6:1	10.2:1	10.8:1	10.9:1	11.4:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	30.25	25.00	25.50	26.00	25.40	24.25
		Gen Fund Equity	3.00	1.00	2.00	0.50	0.70	1.00
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	1.50	1.50	1.00	3.00	2.30	1.60
		Other		1.00				
	Classified/ Non-Rep	Gen Fund	4.00	4.00	3.50	2.50	2.10	1.90
		Gen Fund Equity				0.20	0.60	
		Foundation						
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**40.75**	**34.50**	**34.00**	**34.20**	**33.10**	**30.75**

School and CASR	**Licensed**	39.25	33.80	33.30	33.50	32.90	30.85
	Classified/ Non-Rep	11.31	12.94	15.38	14.02	13.74	12.94
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Hosford

2303 SE 28th Place
503-916-5640

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,210,526	$2,850,477	$3,061,257	$3,184,965	$3,210,950	$3,230,112
Associated Payroll Costs	$1,573,338	$1,447,747	$1,544,587	$1,593,822	$1,800,665	$1,855,145
Purchased Services	$ 12,274	$ 12,676	$ 24,950	$ 20,342	$ 19,764	$ 11,615
Supplies and Materials	$ 50,133	$ 65,570	$ 122,036	$ 82,675	$ 19,692	$ 19,536
Capital		$ 381				
Other Objects			$ 203		$ 600	$ 588
Total	**$4,846,272**	**$4,376,851**	**$4,753,034**	**$4,881,803**	**$5,051,671**	**$5,116,996**
Dollars per Student	**$ 7,705 :1**	**$ 7,733 :1**	**$ 9,193 :1**	**$ 9,091 :1**	**$ 9,568 :1**	**$ 9,765 :1**

Note: Foundation funding ended after the 2023-24 school year.

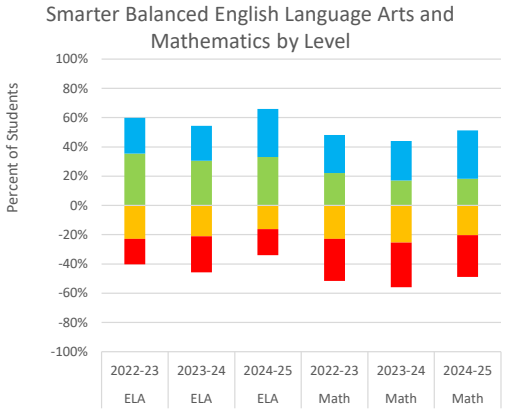
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	20%	22%	27%	30%	35%
*Students with Disabilities	14%	14%	14%	16%	15%
*English Language Learners	5%	4%	4%	5%	7%
*Free-Direct Certification	18%	18%	24%	26%	25%
Black	5%	3%	3%	4%	3%
Latino	8%	7%	10%	10%	11%
Native American	0%	1%	1%	1%	0%
Pacific Islander	1%		0%	1%	1%
Multi-Race - Other Ancestry	5%	6%	6%	6%	6%
Multi-Race - Asian/White	7%	8%	5%	6%	5%
Asian	12%	10%	5%	5%	5%
White	63%	65%	70%	68%	70%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: gaining neighborhood students from Kellogg. Mandarin Immersion moved to Harrison Park. Woodstock Neighborhood now feeds to Lane.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	24%	24%	33%
ELA	Level 3	35%	31%	33%
ELA	Level 2	23%	21%	16%
ELA	Level 1	17%	25%	18%
	ELA Participation	93%	96%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	26%	27%	33%
Math	Level 3	22%	17%	18%
Math	Level 2	23%	25%	20%
Math	Level 1	29%	31%	29%
	Math Participation	91%	93%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Ida B. Wells-Barnett

1151 SW Vermont St
503-916-5280

The Oregon Department of Education has identified this school as a a Targeted Supports for Improvement (TSI) school.

9-12 Constructed 1954

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	1597	1558	1652	1650	1574	1558	1532	1510
Total	**1597**	**1558**	**1652**	**1650**	**1574**	**1558**	**1532**	**1510**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	70.17	69.95	71.28	73.58	71.40	65.00
		Counseling Services	6.00	6.00	6.00	6.00	6.00	6.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	4.71	3.10	2.27	1.50	1.50	1.50
		Other	1.00	1.00	1.00	1.00	1.00	1.00
	Classified /Non-Rep	Clerical	7.20	8.00	8.00	8.00	8.00	6.75
		Ed. Assistant/ Paraeducator						
		Library/Media Services	0.50	0.70	0.70	0.70		
		Other	2.80	2.80	3.80	3.80	2.80	1.80
	Admin.		4.00	4.00	4.00	4.00	5.50	5.50
School Total			**97.38**	**96.55**	**98.05**	**99.58**	**97.20**	**88.55**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	8.50	9.40	10.60	9.00	9.50	9.50
		ESL	0.50	0.50	0.50	1.00	1.00	1.00
		Other	1.00					
	Classified /Non-Rep	Special Education	13.13	12.19	14.07	13.13	14.07	14.07
		ESL						
		Nutrition Services	1.31	1.44	1.44	2.19	2.81	2.81
		Custodial	8.00	13.00	14.18	8.45	11.73	11.73
		Other	2.00	2.50	4.00	3.00	3.00	3.00
CASR Total			**34.45**	**39.03**	**44.78**	**36.77**	**42.11**	**42.11**
Grand Total			**131.83**	**135.58**	**142.83**	**136.35**	**139.31**	**130.66**
Overall Students per FTE			12.1:1	11.5:1	11.6:1	12.1:1	11.3:1	11.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	77.55	75.65	76.71	72.98	73.27	66.00
		Gen Fund Equity				5.00	3.67	4.00
		Gen Fund K-5 Arts						
		Foundation	0.50	0.23		1.60		
		Title I						
		SIA/M98	4.50	4.67	4.84	3.50	3.50	4.50
		Other	0.33	0.50			0.46	
	Classified/ Non-Rep	Gen Fund	8.50	9.50	9.68	10.50	8.13	7.05
		Gen Fund Equity					0.67	
		Foundation						
		Title I						
		SIA/M98	2.00	2.00	2.00	2.00	2.00	1.00
		Other			0.82			0.50
	Admin.	Gen Fund	4.00	4.00	4.00	4.00	5.00	5.00
		Gen Fund Equity						
		Title I						
		Other					0.50	0.50
School Total			**97.38**	**96.55**	**98.05**	**99.58**	**97.20**	**88.55**

School and CASR	**Licensed**	92.88	90.95	92.65	93.08	91.40	85.00
	Classified/ Non-Rep	34.95	40.63	46.18	39.27	42.41	40.16
	Admin.	4.00	4.00	4.00	4.00	5.50	5.50

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Ida B. Wells-Barnett

1151 SW Vermont St
503-916-5280

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$8,124,715	$8,395,703	$9,204,184	$9,871,692	$9,868,907	$9,290,270
Associated Payroll Costs	$3,859,691	$3,923,325	$4,325,769	$4,568,856	$5,362,320	$5,239,692
Purchased Services	$ 62,323	$ 42,699	$ 45,749	$ 46,667	$ 81,087	$ 68,064
Supplies and Materials	$ 546,430	$ 649,570	$1,108,569	$ 875,126	$ 68,820	$ 105,633
Capital	$ 516					$ 125
Other Objects	$ 1,200	$ 5,200	$ 3,082	$ 1,200	$ 2,076	$ 2,052
Total	**$12,594,875**	**$13,016,496**	**$14,687,352**	**$15,363,542**	**$15,383,210**	**$14,705,836**
Dollars per Student	**$ 7,887 :1**	**$ 8,355 :1**	**$ 8,891 :1**	**$ 9,311 :1**	**$ 9,773 :1**	**$ 9,439 :1**

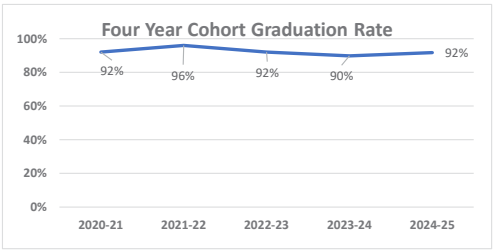
Note: Foundation funding ended after the 2023-24 school year.

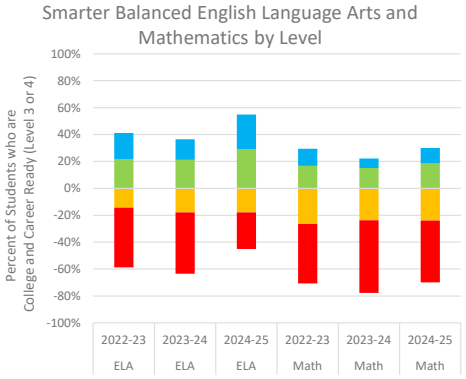
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*		5%	11%	15%	25%
*Students with Disabilities	11%	10%	11%	11%	12%
*English Language Learners	1%	2%	2%	3%	3%
*Free-Direct Certification	9%	10%	17%	16%	17%
Black	4%	4%	5%	4%	5%
Latino	8%	9%	10%	10%	9%
Native American	0%	0%	0%	0%	
Pacific Islander	0%	0%	0%	0%	1%
Multi-Race - Other Ancestry	5%	6%	5%	6%	6%
Multi-Race - Asian/White	5%	6%	6%	6%	6%
Asian	3%	3%	3%	4%	3%
White	74%	72%	71%	71%	71%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	19%	15%	26%
ELA	Level 3	22%	21%	29%
ELA	Level 2	14%	18%	18%
ELA	Level 1	45%	46%	27%
	ELA Participation	35%	73%	75%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	13%	7%	12%
Math	Level 3	17%	15%	19%
Math	Level 2	27%	24%	24%
Math	Level 1	44%	54%	46%
	Math Participation	30%	74%	67%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



Irvington

1320 NE Brazee St
503-916-6386

K-5 Constructed 1932

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	248	228	235	249	259	251	243	239
Total	**248**	**228**	**235**	**249**	**259**	**251**	**243**	**239**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.00	14.50	14.50	13.70	12.60	12.10
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	1.00	1.00	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention	1.00	1.00	1.00	1.50	1.50	1.30
		Other	1.50	1.50	1.50	1.00		1.00
	Classified /Non-Rep	Clerical	2.00	2.00	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator		0.88	0.88	0.88		0.40
		Library/Media Services	0.50					
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**21.50**	**22.88**	**22.38**	**21.18**	**18.20**	**18.70**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.00	1.80	1.60	1.00	1.00	1.00
		ESL	0.25	0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	3.75			0.94	0.94	0.94
		ESL						
		Nutrition Services	1.13	1.13	1.13	1.31	1.31	1.31
		Custodial	2.73	2.73	2.73	2.73	2.73	2.73
		Other				0.88	0.88	
CASR Total			**9.85**	**5.90**	**5.70**	**7.10**	**7.10**	**6.23**
Grand Total			**31.35**	**28.78**	**28.08**	**28.28**	**25.30**	**24.93**
Overall Students per FTE			7.9:1	7.9:1	8.4:1	8.8:1	10.2:1	10.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	15.30	14.45	13.75	14.40	13.40	13.50
		Gen Fund Equity	0.70	0.75	1.00	0.50		0.50
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	0.80	0.80
		Foundation		0.30		0.22		
		Title I						
		SIA/M98	1.50	3.00	3.70	1.50	1.50	1.00
		Other			0.05	0.38		
	Classified/ Non-Rep	Gen Fund	2.00	1.50	1.50	1.50	1.50	1.90
		Gen Fund Equity	0.50	0.50				
		Foundation				0.88		
		Title I						
		SIA/M98						
		Other		0.88	0.88			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**21.50**	**22.88**	**22.38**	**21.18**	**18.20**	**18.70**

School and CASR	**Licensed**	20.25	21.05	20.85	19.05	16.95	17.05
	Classified/ Non-Rep	10.10	6.73	6.23	8.23	7.35	6.88
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Irvington

1320 NE Brazee St
503-916-6386



Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,667,005	$1,819,011	$1,957,222	$1,970,290	$1,830,660	$1,850,117
Associated Payroll Costs	$ 786,449	$ 883,584	$ 953,141	$ 941,925	$1,001,321	$1,040,921
Purchased Services	$ 4,144	$ 4,210	$ 15,265	$ 6,701	$ 11,052	$ 11,292
Supplies and Materials	$ 12,156	$ 14,558	$ 20,862	$ 7,605	$ 11,016	$ 11,256
Capital						
Other Objects					$ 336	$ 336
Total	**$ 2,469,754**	**$ 2,721,363**	**$ 2,946,489**	**$ 2,926,521**	**$ 2,854,385**	**$ 2,913,922**
Dollars per Student	**$ 9,959 :1**	**$ 11,936 :1**	**$ 12,538 :1**	**$ 11,753 :1**	**$ 11,021 :1**	**$ 11,609 :1**

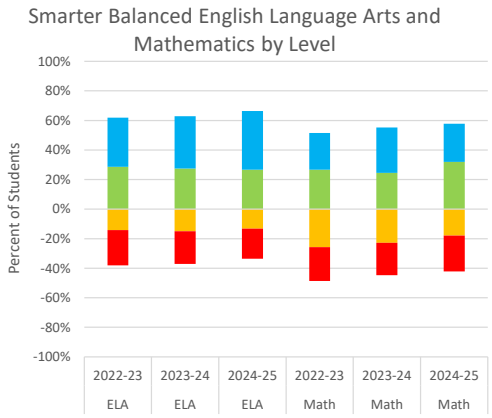
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	25%	29%	31%	35%	38%
*Students with Disabilities	16%	18%	16%	22%	22%
*English Language Learners	4%	3%	4%	5%	4%
*Free-Direct Certification	16%	16%	20%	18%	20%
Black	13%	7%	7%	7%	9%
Latino	10%	12%	11%	12%	13%
Native American					0%
Pacific Islander					
Multi-Race - Other Ancestry	7%	8%	9%	10%	10%
Multi-Race - Asian/White	9%	6%	6%	4%	5%
Asian	1%	1%			1%
White	61%	67%	67%	68%	62%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	33%	35%	40%
ELA	Level 3	29%	27%	27%
ELA	Level 2	14%	15%	13%
ELA	Level 1	24%	22%	20%
	ELA Participation	98%	95%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	25%	31%	26%
Math	Level 3	27%	25%	32%
Math	Level 2	26%	23%	18%
Math	Level 1	23%	22%	24%
	Math Participation	99%	96%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Jackson

10625 SW 35th Ave
503-916-5680

6-8 Constructed 1964

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	752	793	711	715	689	684	663	658
Total	**752**	**793**	**711**	**715**	**689**	**684**	**663**	**658**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	31.50	32.05	33.00	30.50	31.20	29.80
		Counseling Services	2.50	2.00	2.00	2.80	3.00	2.40
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention		1.00	1.00	2.50	0.80	1.30
		Other	2.00	1.00	2.20	1.00	1.00	
	Classified /Non-Rep	Clerical	2.00	2.00	3.00	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator		0.88	1.38	0.88	0.80	1.20
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Other						
	Admin.		3.00	3.00	3.00	2.00	2.00	2.00
School Total			**42.00**	**42.93**	**46.58**	**42.68**	**41.80**	**39.70**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	5.00	5.90	5.20	4.50	4.00	4.00
		ESL	0.50	0.50	0.50	0.50	0.50	1.00
		Other						
	Classified /Non-Rep	Special Education	7.50	7.50	4.69	4.69	2.81	2.81
		ESL						
		Nutrition Services	1.31	2.00	2.63	2.75	2.75	2.75
		Custodial	10.73	14.00	11.73	11.45	9.00	9.00
		Other	1.00	1.00	2.00	2.00	0.60	0.60
CASR Total			**26.04**	**30.90**	**26.74**	**25.89**	**19.66**	**20.16**
Grand Total			**68.04**	**73.83**	**73.32**	**68.57**	**61.46**	**59.86**
Overall Students per FTE			11.1:1	10.7:1	9.7:1	10.4:1	11.2:1	11.4:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	33.50	32.55	36.50	33.36	33.20	31.90
		Gen Fund Equity	1.00	1.50	1.00	0.94	1.00	0.10
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	2.00	2.50	1.20	3.00	2.30	2.00
		Other						
	Classified/ Non-Rep	Gen Fund	2.50	3.38	3.30	3.38	3.30	1.90
		Gen Fund Equity						1.80
		Foundation						
		Title I						
		SIA/M98						
		Other			1.58			
	Admin.	Gen Fund	3.00	2.00	3.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other		1.00				
School Total			**42.00**	**42.93**	**46.58**	**42.68**	**41.80**	**39.70**

School and CASR	**Licensed**	42.00	42.95	44.40	42.30	41.00	39.00
	Classified/ Non-Rep	23.04	27.88	25.92	24.27	18.46	18.86
	Admin.	3.00	3.00	3.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Jackson

10625 SW 35th Ave
503-916-5680

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,526,693	$3,778,996	$4,246,959	$4,228,729	$4,255,415	$4,133,519
Associated Payroll Costs	$1,692,879	$1,786,912	$2,081,755	$2,052,769	$2,316,491	$2,345,567
Purchased Services	$ 104,433	$ 22,006	$ 21,635	$ 24,374	$ 25,104	$ 24,984
Supplies and Materials	$ 61,119	$ 95,226	$ 104,885	$ 107,863	$ 25,032	$ 34,900
Capital		$ 2,321				
Other Objects					$ 756	$ 756
Total	**$ 5,385,125**	**$ 5,685,462**	**$ 6,455,234**	**$ 6,413,735**	**$ 6,622,798**	**$ 6,539,726**
Dollars per Student	**$ 7,161 :1**	**$ 7,170 :1**	**$ 9,079 :1**	**$ 8,970 :1**	**$ 9,612 :1**	**$ 9,561 :1**

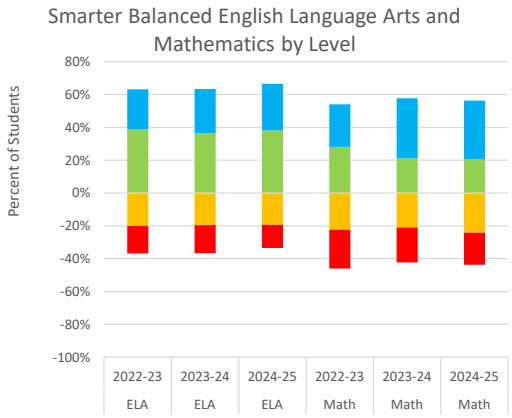
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	18%	20%	22%	26%	31%
*Students with Disabilities	14%	14%	14%	15%	14%
*English Language Learners	2%	3%	2%	5%	5%
*Free-Direct Certification	15%	16%	23%	22%	22%
Black	7%	7%	6%	7%	6%
Latino	9%	10%	11%	11%	11%
Native American	0%	0%			0%
Pacific Islander	1%	1%	1%	1%	1%
Multi-Race - Other Ancestry	6%	6%	6%	6%	8%
Multi-Race - Asian/White	4%	4%	5%	6%	7%
Asian	4%	3%	2%	2%	2%
White	69%	69%	69%	67%	66%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	25%	27%	28%
ELA	Level 3	39%	37%	38%
ELA	Level 2	20%	20%	19%
ELA	Level 1	17%	17%	14%
	ELA Participation	96%	93%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	26%	37%	36%
Math	Level 3	28%	21%	21%
Math	Level 2	22%	21%	24%
Math	Level 1	24%	21%	20%
	Math Participation	93%	93%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

James John

7439 N Charleston Ave
503-916-6266

Title I School for 2026-27

K-5 Constructed 1929

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	208	208	220	224	232	226	221	229
Spanish Immersion	124	129	128	143	133	135	137	140
Total	**332**	**337**	**348**	**367**	**365**	**361**	**358**	**369**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	21.15	20.90	21.15	18.40	18.40	18.40
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	0.80	1.00	0.80	0.80	0.80
		Instructional Spec/ Coach/ Intervention	1.91	2.50	2.95	3.20	3.20	2.00
		Other	1.50	1.50	2.00	1.00	2.00	2.20
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	3.37	3.80	3.50	0.88	1.95	3.67
		Library/Media Services	0.75	0.75				
		Other						
	Admin.		2.00	2.00	2.00	2.00	1.00	1.00
School Total			**34.68**	**35.25**	**35.60**	**29.28**	**30.35**	**31.07**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.50	4.00	3.50	4.00	3.50
		ESL	1.50	2.00	2.50	2.50	3.00	2.00
		Other	1.00	1.00	0.50			
	Classified /Non-Rep	Special Education	5.63	5.63	3.75	6.57	6.57	4.69
		ESL	0.44	0.87	0.88	0.88	0.88	0.44
		Nutrition Services	3.13	2.31	2.31	1.69	1.69	1.69
		Custodial	3.73	5.00	3.00	3.00	2.00	2.00
		Other	0.88	0.88	0.88			
CASR Total			**19.29**	**22.19**	**17.82**	**18.13**	**18.13**	**14.32**
Grand Total			**53.97**	**57.44**	**53.42**	**47.41**	**48.48**	**45.38**
Overall Students per FTE			6.2:1	5.9:1	6.5:1	7.7:1	7.5:1	8.0:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	17.15	20.15	18.15	19.00	19.00	19.00
		Gen Fund Equity	1.55	2.30	1.80		1.50	1.00
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation						
		Title I	0.86	0.25	1.03	0.20	0.20	0.20
		SIA/M98	6.00	3.00	5.50	3.50	3.00	2.75
		Other			0.63	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.50	1.50	1.50	1.90
		Gen Fund Equity	0.50					1.00
		Foundation						
		Title I	2.62	2.68	1.63	0.33	1.58	1.89
		SIA/M98			1.50	0.88	0.88	0.88
		Other	1.50	2.38	0.88	0.17		
	Admin.	Gen Fund	1.50	1.50	1.50	1.00	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50	0.70		
		Title I				0.30		
		Other						
School Total			**34.68**	**35.25**	**35.60**	**29.28**	**30.35**	**31.07**

School and CASR	**Licensed**	32.06	34.20	35.10	30.40	32.40	29.90
	Classified/ Non-Rep	19.91	21.24	16.32	15.01	15.08	14.48
	Admin.	2.00	2.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

James John

7439 N Charleston Ave
503-916-6266

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,442,390	$2,778,849	$3,029,265	$2,921,589	$2,907,181	$2,963,906
Associated Payroll Costs	$1,243,576	$1,390,560	$1,570,525	$1,457,122	$1,637,997	$1,734,770
Purchased Services	$ 16,538	$ 20,441	$ 25,934	$ 8,583	$ 14,784	$ 14,700
Supplies and Materials	$ 54,052	$ 85,276	$ 51,879	$ 38,294	$ 77,075	$ 18,055
Capital	$ 250					
Other Objects	$ 13		$ 1,505		$ 444	$ 444
Total	**$ 3,756,819**	**$ 4,275,126**	**$ 4,679,107**	**$ 4,425,588**	**$ 4,637,481**	**$ 4,731,875**
Dollars per Student	**$ 11,316 :1**	**$ 12,686 :1**	**$ 13,446 :1**	**$ 12,059 :1**	**$ 12,705 :1**	**$ 13,108 :1**

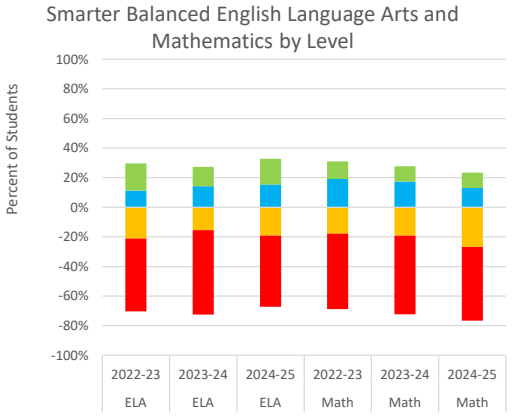
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	50%	52%	57%	62%	67%
*Students with Disabilities	21%	19%	20%	19%	19%
*English Language Learners	24%	26%	27%	30%	26%
*Free-Direct Certification	38%	38%	55%	55%	54%
Black	8%	9%	8%	8%	8%
Latino	41%	42%	43%	48%	48%
Native American	1%	0%	1%		1%
Pacific Islander	1%	1%		0%	0%
Multi-Race - Other Ancestry	8%	8%	9%	8%	7%
Multi-Race - Asian/White	1%	1%	2%	3%	3%
Asian	2%	1%	1%	1%	1%
White	39%	37%	37%	32%	32%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	18%	13%	18%
ELA	Level 3	11%	14%	15%
ELA	Level 2	21%	15%	19%
ELA	Level 1	49%	57%	48%
	ELA Participation	98%	95%	95%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	12%	10%	10%
Math	Level 3	19%	17%	13%
Math	Level 2	18%	19%	27%
Math	Level 1	51%	53%	50%
	Math Participation	97%	94%	94%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Jefferson

5210 N Kerby Ave
503-916-5180

The Oregon Department of Education has identified this school as a Comprehensive Supports for Improvement (CSI) school. Title I School for 2026-27

9-12 Constructed 1909

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	588	595	515	446	377	395	539	789
Mandarin Immersion		12	10	13	14	8	8	9
Total	**588**	**607**	**525**	**459**	**391**	**403**	**547**	**798**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	37.42	39.53	39.33	31.83	25.51	25.34
		Counseling Services	1.50	2.00	3.00	2.00	2.00	2.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	1.50	1.00	2.00	2.00	2.50	1.00
		Other	2.83	2.13	3.50	3.50	2.16	2.83
	Classified /Non-Rep	Clerical	5.80	5.80	5.80	5.05	8.01	4.63
		Ed. Assistant/ Paraeducator	0.40	0.40				
		Library/Media Services						
		Other	3.00	3.00	3.00	3.00	2.75	2.87
	Admin.		3.50	3.00	3.50	3.50	5.00	5.00
School Total			**56.95**	**57.86**	**61.13**	**51.88**	**48.93**	**44.67**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.60	3.60	3.00	2.50	2.00
		ESL	1.00	1.00	1.00	1.00	1.00	0.50
		Other	6.40	6.00	6.00			
	Classified /Non-Rep	Special Education	1.88	1.88	2.81	1.88	1.88	1.88
		ESL	0.44	0.44				
		Nutrition Services	1.50	1.50	1.25	1.25	1.25	1.25
		Custodial	8.00	13.45	10.00	13.00	10.00	10.00
		Other	7.80	7.46	8.80	7.80	6.80	6.80
CASR Total			**30.01**	**36.32**	**33.46**	**27.93**	**23.43**	**22.43**
Grand Total			**86.96**	**94.18**	**94.59**	**79.81**	**72.36**	**67.09**
Overall Students per FTE			6.8:1	6.4:1	5.6:1	5.8:1	5.4:1	6.0:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	34.41	34.49	36.16	30.00	25.39	25.17
		Gen Fund Equity	5.50	6.00	7.00	4.50	3.17	2.34
		Gen Fund K-5 Arts						
		Foundation						
		Title I				2.00	0.45	0.83
		SIA/M98	4.00	5.00	5.67	3.83	3.50	3.83
		Other	0.33	0.17			0.67	
	Classified/ Non-Rep	Gen Fund	6.75	6.26	6.54	6.75	7.36	4.00
		Gen Fund Equity					0.25	1.82
		Foundation						
		Title I				0.30	1.00	0.68
		SIA/M98	2.00	2.00	2.00	1.00	2.00	1.00
		Other	0.45	0.94	0.26		0.15	
	Admin.	Gen Fund	2.50	2.50	2.50	2.50	4.00	3.50
		Gen Fund Equity	0.50					
		Title I						
		Other	0.50	0.50	1.00	1.00	1.00	1.50
School Total			**56.95**	**57.86**	**61.13**	**51.88**	**48.93**	**44.67**

School and CASR	**Licensed**	54.65	57.26	59.43	44.33	36.67	34.67
	Classified/ Non-Rep	28.81	33.92	31.66	31.98	30.69	27.42
	Admin.	3.50	3.00	3.50	3.50	5.00	5.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Jefferson

5210 N Kerby Ave
503-916-5180

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$4,350,746	$4,723,133	$5,052,187	$4,892,942	$4,664,350	$4,366,078
Associated Payroll Costs	$2,158,427	$2,312,800	$2,459,490	$2,278,229	$2,570,846	$2,508,385
Purchased Services	$ 17,154	$ 30,056	$ 40,558	$ 48,808	$ 42,223	$ 30,492
Supplies and Materials	$ 159,428	$ 217,874	$ 246,679	$ 299,982	$ 118,423	$ 121,818
Capital	$ 258	$ 308		$ 943		
Other Objects	$ 1,675	$ 129	$ 2,700	$ 13,727	$ 948	$ 924
Total	**$ 6,687,688**	**$ 7,284,300**	**$ 7,801,615**	**$ 7,534,631**	**$ 7,396,790**	**$ 7,027,697**
Dollars per Student	**$ 11,374 :1**	**$ 12,000 :1**	**$ 14,860 :1**	**$ 16,415 :1**	**$ 18,918 :1**	**$ 17,438 :1**

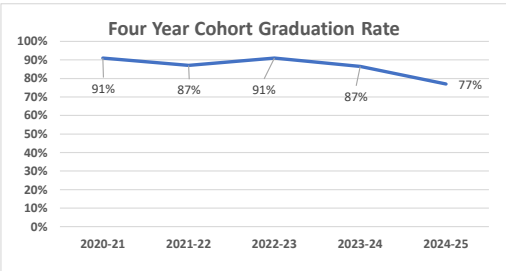
Note: Foundation funding ended after the 2023-24 school year.

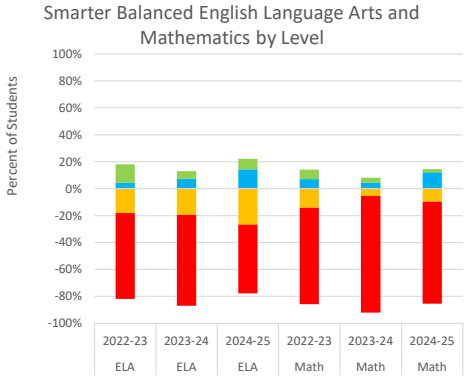
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	1%	11%	23%	39%	61%
*Students with Disabilities	15%	13%	16%	15%	14%
*English Language Learners	7%	8%	8%	10%	7%
*Free-Direct Certification	39%	43%	53%	56%	55%
Black	39%	42%	44%	47%	45%
Latino	21%	22%	22%	21%	20%
Native American	0%	0%	0%	0%	1%
Pacific Islander	1%	1%	1%	1%	1%
Multi-Race - Other Ancestry	12%	11%	11%	12%	12%
Multi-Race - Asian/White	2%	2%	1%	1%	2%
Asian	1%	1%	2%	1%	2%
White	24%	21%	20%	17%	18%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	14%	6%	8%
ELA	Level 3	5%	7%	14%
ELA	Level 2	18%	20%	27%
ELA	Level 1	64%	68%	51%
	ELA Participation	16%	78%	68%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	7%	4%	2%
Math	Level 3	7%	5%	12%
Math	Level 2	14%	5%	10%
Math	Level 1	71%	87%	76%
	Math Participation	20%	71%	61%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Kellogg

3330 SE 69TH AVE
503-916-5707

Title I School for 2026-27

6-8 Constructed 2021

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	533	502	449	373	330	299	271	241
Spanish Immersion	151	159	228	221	201	216	238	247
Total	**684**	**661**	**677**	**594**	**531**	**515**	**509**	**488**

2021-22 SY, Kellogg opened with a new building. 2023-24, gained Spanish Immersion

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	37.50	35.00	35.00	31.50	25.40	23.00
		Counseling Services	3.00	3.00	3.00	3.00	3.00	3.00
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention		1.00	1.50	4.00	2.60	3.00
		Other	1.00	2.50	1.00	3.00	1.50	1.00
	Classified /Non-Rep	Clerical	2.00	2.00	3.00	3.00	2.00	2.00
		Ed. Assistant/ Paraeducator	1.76	3.07				0.40
		Library/Media Services	1.00	1.00	0.60	0.50		
		Other	3.00	3.00	1.00			
	Admin.		3.00	3.00	3.00	3.00	3.00	2.00
School Total			**52.76**	**54.07**	**48.60**	**48.50**	**38.00**	**34.90**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	6.00	7.20	6.90	5.50	4.00	4.50
		ESL	1.50	1.50	2.50	2.50	2.50	2.00
		Other		1.50	1.00			
	Classified /Non-Rep	Special Education	5.63	9.38	9.38	11.26	7.50	6.57
		ESL	0.44	0.44	0.88	0.88	0.88	
		Nutrition Services	2.06	2.13	2.13	2.13	2.13	2.13
		Custodial	3.00	4.00	4.00	4.00	4.00	4.00
		Other		1.00	1.00	1.00	1.00	1.00
CASR Total			**18.63**	**27.14**	**27.78**	**27.26**	**22.01**	**20.19**
Grand Total			**71.39**	**81.21**	**76.38**	**75.76**	**60.01**	**55.09**
Overall Students per FTE			9.6:1	8.1:1	8.9:1	7.8:1	8.8:1	9.3:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	31.78	29.75	34.05	34.70	27.70	26.10
		Gen Fund Equity	6.50	5.00	3.80	0.30	0.10	1.40
		Gen Fund K-5 Arts						
		Foundation						
		Title I	0.22	0.75		1.00	0.60	0.20
		SIA/M98	3.00	6.00	2.75	6.00	4.60	2.80
		Other	0.50	0.50	0.40			
	Classified/ Non-Rep	Gen Fund	4.00	6.00	3.60	1.50	1.50	1.10
		Gen Fund Equity						0.20
		Foundation						
		Title I	3.76	3.07		2.00	0.50	1.10
		SIA/M98			1.00			
		Other						
	Admin.	Gen Fund	2.00	3.00	2.50	2.00	2.00	2.00
		Gen Fund Equity			0.50	1.00	1.00	
		Title I						
		Other	1.00					
School Total			**52.76**	**54.07**	**48.60**	**48.50**	**38.00**	**34.90**

School and CASR	**Licensed**	49.50	52.20	51.40	50.00	39.50	37.00
	Classified/ Non-Rep	18.89	26.01	21.98	22.76	17.51	16.09
	Admin.	3.00	3.00	3.00	3.00	3.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Kellogg

3330 SE 69TH AVE
503-916-5707

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,937,218	$4,230,976	$4,507,745	$4,778,723	$4,147,883	$3,862,342
Associated Payroll Costs	$1,950,507	$1,993,388	$2,116,631	$2,284,360	$2,258,353	$2,172,712
Purchased Services	$ 8,066	$ 24,785	$ 21,225	$ 59,589	$ 20,364	$ 19,476
Supplies and Materials	$ 100,898	$ 134,376	$ 64,497	$ 108,325	$ 86,082	$ 29,404
Capital	$ 1,705					
Other Objects	$ 48	$ 141		$ 2,859	$ 612	$ 588
Total	**$ 5,998,442**	**$ 6,383,666**	**$ 6,710,098**	**$ 7,233,856**	**$ 6,513,294**	**$ 6,084,522**
Dollars per Student	**$ 8,770 :1**	**$ 9,658 :1**	**$ 9,912 :1**	**$ 12,178 :1**	**$ 12,266 :1**	**$ 11,815 :1**

Note: Foundation funding ended after the 2023-24 school year.

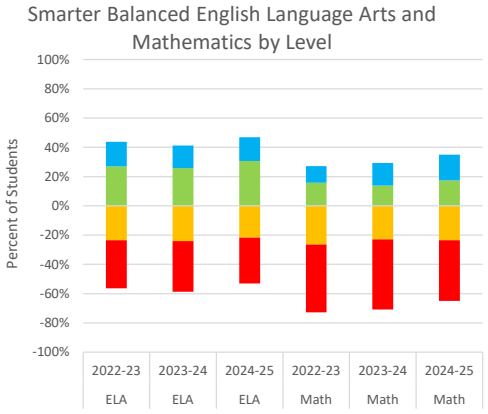
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	36%	37%	41%	46%	55%
*Students with Disabilities	18%	18%	18%	20%	18%
*English Language Learners	12%	15%	17%	16%	16%
*Free-Direct Certification	31%	32%	44%	46%	44%
Black	6%	4%	4%	4%	4%
Latino	30%	31%	34%	35%	35%
Native American	0%	1%	0%	1%	
Pacific Islander	2%	2%	1%	1%	2%
Multi-Race - Other Ancestry	5%	7%	6%	7%	7%
Multi-Race - Asian/White	4%	4%	4%	3%	3%
Asian	12%	9%	9%	7%	8%
White	41%	43%	41%	43%	42%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: losing neighborhood students to Hosford, Spanish Immersion moved from Mt. Tabor. Creston now feeds Hosford.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	17%	15%	16%
ELA	Level 3	27%	26%	31%
ELA	Level 2	24%	24%	22%
ELA	Level 1	33%	35%	31%
	ELA Participation	96%	95%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	12%	15%	18%
Math	Level 3	16%	14%	17%
Math	Level 2	27%	23%	24%
Math	Level 1	46%	48%	42%
	Math Participation	97%	95%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Kelly

9030 SE Cooper St
503-916-6350

Title I School for 2026-27

K-5 Constructed 1957

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	238	213	232	246	268	267	259	262
Russian Immersion	134	143	144	139	143	147	145	145
Total	**372**	**356**	**376**	**385**	**411**	**414**	**404**	**407**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	25.00	22.10	21.15	20.40	20.40	19.40
		Counseling Services	2.00	2.00	1.00	1.00	1.20	1.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	4.00	3.50	4.00	4.00	2.50	2.00
		Other			1.00	1.00	1.00	1.00
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	4.50	4.38	2.63	2.63	4.20	3.73
		Library/Media Services						
		Other	1.00	1.00	1.00	1.00	1.00	1.00
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**41.50**	**37.98**	**35.78**	**35.03**	**35.30**	**33.13**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.50	2.00	2.70	1.50	1.50	1.00
		ESL	3.50	4.00	4.50	4.00	4.50	4.00
		Other						
	Classified /Non-Rep	Special Education						
		ESL	2.19	1.62	1.75	1.75	1.75	0.88
		Nutrition Services	2.88	2.81	2.94	2.69	2.69	2.69
		Custodial	3.00	4.00	5.00	4.00	4.00	4.00
		Other						
CASR Total			**13.07**	**14.44**	**16.89**	**13.94**	**14.44**	**12.57**
Grand Total			**54.57**	**52.42**	**52.67**	**48.97**	**49.74**	**45.69**
Overall Students per FTE			6.8:1	6.8:1	7.1:1	7.9:1	8.3:1	9.1:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	25.40	21.40	20.20	21.00	21.35	20.00
		Gen Fund Equity	3.30	2.54	2.80	0.10	0.03	0.50
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation						
		Title I	0.30	0.66	0.90	1.00	0.01	0.50
		SIA/M98	2.00	2.00	3.25	3.50	3.00	1.95
		Other		1.00		0.60	0.51	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.50	1.50	1.50	1.90
		Gen Fund Equity		0.50			0.15	0.20
		Foundation						
		Title I	4.00	3.00	2.05	1.50	2.73	2.88
		SIA/M98			1.00	2.63	2.63	1.75
		Other	2.00	2.38	1.08		0.20	
	Admin.	Gen Fund	1.50	1.50	1.50	1.00	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50	1.00	1.00	1.00
		Title I						
		Other						
School Total			**41.50**	**37.98**	**35.78**	**35.03**	**35.30**	**33.13**

School and CASR	**Licensed**	37.00	34.60	35.35	32.90	32.10	29.40
	Classified/ Non-Rep	15.57	15.82	15.32	14.07	15.64	14.29
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Kelly

9030 SE Cooper St
503-916-6350

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,055,748	$2,967,011	$3,084,734	$3,126,027	$3,268,405	$3,192,277
Associated Payroll Costs	$1,500,679	$1,411,178	$1,465,234	$1,530,551	$1,832,548	$1,850,003
Purchased Services	$ 20,144	$ 40,774	$ 39,220	$ 49,245	$ 7,743	$ 16,284
Supplies and Materials	$ 84,038	$ 55,006	$ 39,310	$ 42,677	$ 64,385	$ 20,958
Capital	$ 3,669	$ 727				
Other Objects	$ 0	$ 1			$ 456	$ 492
Total	**$ 4,664,279**	**$ 4,474,696**	**$ 4,628,498**	**$ 4,748,500**	**$ 5,173,537**	**$ 5,080,014**
Dollars per Student	**$ 12,538 :1**	**$ 12,569 :1**	**$ 12,310 :1**	**$ 12,334 :1**	**$ 12,588 :1**	**$ 12,271 :1**

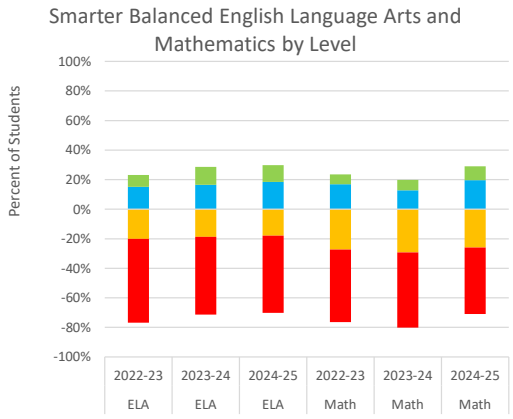
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	39%	46%	57%	71%	82%
*Students with Disabilities	16%	14%	18%	15%	13%
*English Language Learners	45%	46%	50%	48%	46%
*Free-Direct Certification	45%	47%	67%	67%	67%
Black	11%	9%	10%	13%	11%
Latino	18%	21%	22%	22%	23%
Native American	2%	0%			1%
Pacific Islander	3%	3%	4%	2%	2%
Multi-Race - Other Ancestry	8%	6%	7%	6%	6%
Multi-Race - Asian/White	1%	1%	1%	1%	1%
Asian	9%	8%	10%	9%	10%
White	50%	51%	47%	48%	47%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	8%	12%	11%
ELA	Level 3	15%	17%	19%
ELA	Level 2	20%	19%	18%
ELA	Level 1	57%	53%	52%
	ELA Participation	100%	97%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	7%	7%	9%
Math	Level 3	17%	13%	20%
Math	Level 2	27%	29%	26%
Math	Level 1	49%	51%	45%
	Math Participation	98%	96%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Lane

7200 SE 60th Ave
503-916-6355

Title I School for 2026-27

6-8 Constructed 1926

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	322	302	362	386	411	390	386	372
Russian Immersion	41	34	29	32	36	37	33	35
Total	**363**	**336**	**391**	**418**	**447**	**427**	**419**	**407**

Lane shared site with ACCESS 6-8 from 2018-19 to 2021-22 SY.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	22.75	22.00	24.00	25.00	21.90	21.40
		Counseling Services	2.00	2.50	2.00	2.50	2.20	2.40
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	1.25	1.00	1.00	3.00	2.60	2.10
		Other	1.50	3.00	2.50	2.00	2.00	
	Classified /Non-Rep	Clerical	3.25	2.00	3.00	2.00	2.50	2.50
		Ed. Assistant/ Paraeducator					0.40	0.40
		Library/Media Services						
		Other	2.00	2.00				
	Admin.		2.00	3.00	3.00	3.00	2.00	2.00
School Total			**35.75**	**36.50**	**36.50**	**38.50**	**34.60**	**31.80**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.50	4.80	6.50	5.50	6.00	5.50
		ESL	1.50	1.50	1.50	2.00	2.00	1.50
		Other	1.00	1.00	1.00			
	Classified /Non-Rep	Special Education	2.81	3.75	5.63	7.50	5.63	5.63
		ESL	0.44	0.44	0.44	0.44	0.44	
		Nutrition Services	2.19	2.19	2.06	2.06	2.31	2.31
		Custodial	5.00	4.00	5.00	4.00	4.00	4.00
		Other	1.00	2.00	3.00	2.00	1.00	1.00
CASR Total			**18.44**	**19.68**	**25.13**	**23.51**	**21.38**	**19.94**
Grand Total			**54.19**	**56.18**	**61.63**	**62.01**	**55.98**	**51.74**
Overall Students per FTE			6.7:1	6.0:1	6.3:1	6.7:1	8.0:1	8.3:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	19.75	19.25	20.45	26.30	23.30	21.50
		Gen Fund Equity	3.50	4.00	2.30	0.10	1.50	1.50
		Gen Fund K-5 Arts						
		Foundation						
		Title I	0.75	1.13	1.25	2.10	0.30	1.30
		SIA/M98	4.00	5.00	6.00	5.00	4.40	2.60
		Other	0.50	0.13	0.50		0.20	
	Classified/ Non-Rep	Gen Fund	3.00	3.00	2.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation						
		Title I	2.25	1.00		0.50	1.40	1.00
		SIA/M98			1.00			
		Other						
	Admin.	Gen Fund	2.00	2.00	2.50	2.00	2.00	2.00
		Gen Fund Equity			0.50	1.00		
		Title I						
		Other		1.00				
School Total			**35.75**	**36.50**	**36.50**	**38.50**	**34.60**	**31.80**

School and CASR	**Licensed**	35.50	36.80	39.50	41.00	37.70	33.90
	Classified/ Non-Rep	16.69	16.38	19.13	18.01	16.28	15.84
	Admin.	2.00	3.00	3.00	3.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Lane

7200 SE 60th Ave
503-916-6355

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,701,611	$2,732,141	$3,286,593	$3,771,305	$3,531,095	$3,296,346
Associated Payroll Costs	$1,330,157	$1,315,662	$1,601,580	$1,863,868	$1,953,223	$1,893,473
Purchased Services	$ 56,021	$ 37,473	$ 47,334	$ 30,098	$ 56,743	$ 16,740
Supplies and Materials	$ 107,570	$ 63,531	$ 106,679	$ 111,818	$ 77,444	$ 37,039
Capital	$ 480					
Other Objects		$ 1	$ 8,632		$ 504	$ 504
Total	**$ 4,195,839**	**$ 4,148,808**	**$ 5,050,818**	**$ 5,777,088**	**$ 5,619,009**	**$ 5,244,102**
Dollars per Student	**$ 11,559 :1**	**$ 12,348 :1**	**$ 12,918 :1**	**$ 13,821 :1**	**$ 12,570 :1**	**$ 12,281 :1**

Note: Foundation funding ended after the 2023-24 school year.

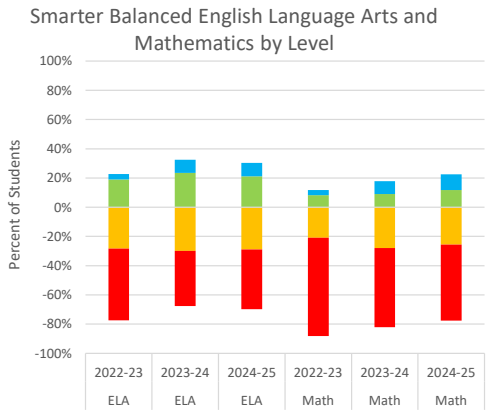
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	36%	41%	51%	60%	70%
*Students with Disabilities	21%	23%	24%	26%	25%
*English Language Learners	20%	19%	17%	20%	18%
*Free-Direct Certification	42%	41%	60%	59%	57%
Black	12%	10%	10%	9%	13%
Latino	25%	26%	26%	28%	24%
Native American	1%		1%	1%	1%
Pacific Islander	3%	2%	3%	2%	1%
Multi-Race - Other Ancestry	6%	6%	7%	6%	7%
Multi-Race - Asian/White	2%	2%	2%	2%	2%
Asian	15%	16%	13%	14%	11%
White	37%	39%	38%	39%	40%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: Woodstock now feeds Lane. Future increase in neighborhood students from other Elementary boundary changes.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	4%	9%	9%
ELA	Level 3	19%	23%	21%
ELA	Level 2	28%	30%	29%
ELA	Level 1	49%	38%	41%
	ELA Participation	92%	87%	87%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	4%	9%	11%
Math	Level 3	8%	9%	12%
Math	Level 2	21%	28%	26%
Math	Level 1	67%	54%	52%
	Math Participation	88%	86%	86%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Laurelhurst

840 NE 41st Ave
503-916-6210

K-8 Constructed 1923

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	649	674	659	656	610	574	585	569
Total	**649**	**674**	**659**	**656**	**610**	**574**	**585**	**569**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	30.50	30.00	30.70	31.03	29.13	27.08
		Counseling Services	2.60	2.00	2.00	2.00	1.80	2.00
		Library/Media Services	1.00	1.00	0.75	0.80	0.80	0.60
		Instructional Spec/ Coach/ Intervention	1.00	0.60	1.90	1.47	1.27	1.00
		Other						
	Classified /Non-Rep	Clerical	2.00	2.00	3.20	2.00	2.30	1.50
		Ed. Assistant/ Paraeducator	3.20	2.88	3.20	2.90		0.40
		Library/Media Services						
		Other						
	Admin.		2.00	2.00	2.00	2.00	2.00	1.80
School Total			**42.30**	**40.48**	**43.75**	**42.20**	**37.30**	**34.38**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.50	3.20	3.20	2.00	2.00	2.00
		ESL	0.25	0.25	0.25	0.25	0.25	
		Other						
	Classified /Non-Rep	Special Education	2.32	2.32	1.88	1.88	0.94	0.94
		ESL						
		Nutrition Services	1.63	1.56	1.56	1.69	1.69	1.69
		Custodial	3.00	4.00	3.00	3.00	3.00	3.00
		Other						
CASR Total			**8.69**	**11.33**	**9.89**	**8.81**	**7.88**	**7.63**
Grand Total			**50.99**	**51.81**	**53.64**	**51.01**	**45.18**	**42.01**
Overall Students per FTE			12.7:1	13.0:1	12.3:1	12.9:1	13.5:1	13.7:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	32.50	30.45	33.35	32.60	31.00	28.68
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.00	1.00	1.00
		Foundation	0.60	0.10		0.70		
		Title I						
		SIA/M98	1.00	1.00	1.00	1.00	1.00	1.00
		Other		1.05				
	Classified/ Non-Rep	Gen Fund	2.00	2.00	3.20	2.00	2.30	1.90
		Gen Fund Equity						
		Foundation	3.20	2.88	1.59	2.90		
		Title I						
		SIA/M98						
		Other			1.61			
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	1.80
		Gen Fund Equity						
		Title I						
		Other						
School Total			**42.30**	**40.48**	**43.75**	**42.20**	**37.30**	**34.38**

School and CASR	**Licensed**	36.85	37.05	38.80	37.55	35.25	32.68
	Classified/ Non-Rep	12.14	12.76	12.84	11.46	7.93	7.53
	Admin.	2.00	2.00	2.00	2.00	2.00	1.80

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Laurelhurst

840 NE 41st Ave
503-916-6210

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,279,822	$3,504,450	$3,952,899	$4,147,778	$3,904,728	$3,640,931
Associated Payroll Costs	$1,522,002	$1,617,783	$1,866,506	$1,952,585	$2,099,903	$2,058,863
Purchased Services	$ 8,877	$ 5,263	$ 18,393	$ 12,539	$ 23,088	$ 21,168
Supplies and Materials	$ 42,789	$ 90,034	$ 111,005	$ 105,891	$ 23,016	$ 31,108
Capital		$ 1,958		$ 137,538		
Other Objects					$ 696	$ 636
Total	**$ 4,853,489**	**$ 5,219,488**	**$ 5,948,802**	**$ 6,356,331**	**$ 6,051,431**	**$ 5,752,706**
Dollars per Student	**$ 7,478 :1**	**$ 7,744 :1**	**$ 9,027 :1**	**$ 9,690 :1**	**$ 9,920 :1**	**$ 10,022 :1**

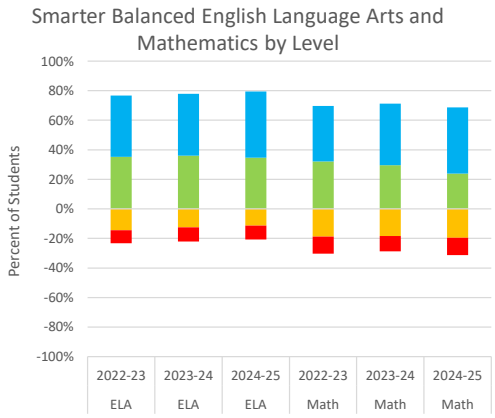
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	14%	16%	17%	21%	24%
*Students with Disabilities	10%	11%	13%	15%	15%
*English Language Learners				1%	1%
*Free-Direct Certification	6%	6%	8%	13%	12%
Black	1%	2%	2%	3%	2%
Latino	6%	6%	6%	6%	7%
Native American	0%	0%	0%	1%	0%
Pacific Islander					0%
Multi-Race - Other Ancestry	4%	5%	6%	6%	6%
Multi-Race - Asian/White	6%	7%	7%	6%	8%
Asian	3%	2%	2%	3%	3%
White	80%	78%	77%	75%	74%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	41%	42%	45%
ELA	Level 3	35%	36%	35%
ELA	Level 2	14%	13%	11%
ELA	Level 1	9%	10%	9%
	ELA Participation	99%	99%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	38%	42%	45%
Math	Level 3	32%	30%	24%
Math	Level 2	19%	18%	20%
Math	Level 1	12%	10%	12%
	Math Participation	98%	99%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Lee

2222 NE 92nd Ave
503-916-6144

Title I School for 2026-27

K-5 *Constructed 1952*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	236	276	288	257	251	255	248	251
Total	**236**	**276**	**288**	**257**	**251**	**255**	**248**	**251**

Converted from a K-8 to K-5 Feeding Roseway Heights MS, Boundary change with Rose City Park, both starting 2018-19 SY.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.00	14.00	14.00	14.00	12.80	12.60
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.40	0.40
		Instructional Spec/ Coach/ Intervention	1.50	2.50	2.50	2.00	1.80	1.80
		Other	0.50	0.50	1.25	1.00	2.00	1.00
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	1.00	1.00
		Ed. Assistant/ Paraeducator	2.25	2.63	2.63	3.13	0.88	2.15
		Library/Media Services	0.50	0.50				
		Other	0.50	0.50	1.50	1.50	0.50	0.88
	Admin.		2.00	2.00	2.00	2.00	1.00	1.00
School Total			**24.75**	**26.13**	**27.38**	**27.23**	**21.38**	**21.83**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.20	4.20	3.50	3.50	3.50
		ESL	1.50	1.50	1.00	1.00	1.00	1.00
		Other				3.00	3.00	3.00
	Classified /Non-Rep	Special Education	7.50	7.50	6.57	7.50	5.63	5.63
		ESL	0.44	0.44	0.44			
		Nutrition Services	1.81	2.13	2.13	1.69	1.69	1.69
		Custodial	3.00	3.00	4.00	3.00	3.00	3.00
		Other				6.13	6.75	5.13
CASR Total			**17.26**	**18.77**	**18.33**	**25.82**	**24.57**	**22.94**
Grand Total			**42.01**	**44.90**	**45.71**	**53.05**	**45.94**	**44.77**
Overall Students per FTE			5.6:1	6.1:1	6.3:1	4.8:1	5.5:1	5.7:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	11.60	12.50	14.50	14.40	13.15	12.20
		Gen Fund Equity	1.30	2.00	1.00	0.20	1.00	1.00
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I	0.20	0.50	0.50	0.20	0.55	0.30
		SIA/M98	3.90	3.00	2.13	2.50	2.00	2.25
		Other			0.63	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	2.00	2.00	1.50	1.50	1.00	1.90
		Gen Fund Equity			0.50	1.59		
		Foundation						
		Title I	2.00	1.25	2.13	1.79	0.50	0.38
		SIA/M98			1.00	1.75	0.88	1.75
		Other	1.25	2.38	1.00			
	Admin.	Gen Fund	1.50	1.50	1.50	2.00	1.00	1.00
		Gen Fund Equity	0.50		0.50			
		Title I						
		Other		0.50				
School Total			**24.75**	**26.13**	**27.38**	**27.23**	**21.38**	**21.83**

School and CASR	**Licensed**	22.00	24.20	24.45	26.10	25.50	24.30
	Classified/ Non-Rep	18.01	18.70	19.26	24.95	19.44	19.47
	Admin.	2.00	2.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Lee

2222 NE 92nd Ave
503-916-6144

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,796,218	$2,063,213	$2,356,338	$2,409,577	$2,106,601	$2,150,286
Associated Payroll Costs	$ 885,141	$ 931,903	$1,098,433	$1,108,083	$1,139,059	$1,246,643
Purchased Services	$ 9,648	$ 7,335	$ 11,388	$ 5,830	$ 10,932	$ 12,424
Supplies and Materials	$ 52,830	$ 43,581	$ 55,349	$ 21,496	$ 65,938	$ 24,636
Capital	$ 214					$ 1,000
Other Objects			$ 36		$ 324	$ 348
Total	**$ 2,744,051**	**$ 3,046,032**	**$ 3,521,544**	**$ 3,544,986**	**$ 3,322,853**	**$ 3,435,337**
Dollars per Student	**$ 11,627 :1**	**$ 11,036 :1**	**$ 12,228 :1**	**$ 13,794 :1**	**$ 13,238 :1**	**$ 13,472 :1**

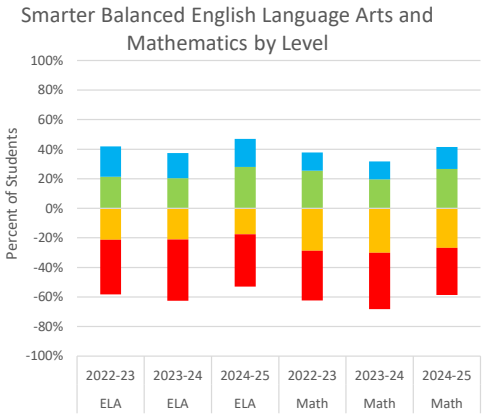
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	36%	42%	48%	54%	63%
*Students with Disabilities	15%	20%	24%	29%	33%
*English Language Learners	25%	22%	16%	14%	10%
*Free-Direct Certification	33%	38%	45%	47%	45%
Black	15%	12%	13%	14%	14%
Latino	20%	21%	19%	18%	19%
Native American	0%			0%	0%
Pacific Islander	2%	3%	4%	4%	4%
Multi-Race - Other Ancestry	9%	8%	8%	7%	8%
Multi-Race - Asian/White	2%	1%	3%	4%	3%
Asian	16%	16%	11%	10%	9%
White	38%	39%	42%	43%	43%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	21%	17%	19%
ELA	Level 3	21%	20%	28%
ELA	Level 2	21%	21%	18%
ELA	Level 1	37%	42%	35%
	ELA Participation	97%	91%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	12%	12%	15%
Math	Level 3	25%	20%	27%
Math	Level 2	29%	30%	27%
Math	Level 1	34%	38%	32%
	Math Participation	97%	90%	94%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Lent

5105 SE 97th Ave
503-916-6322

Title I School for 2026-27

K-5 *Constructed 1948*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	151	122						
Spanish Immersion	126	129	273	256	256	253	256	268
Total	**277**	**251**	**273**	**256**	**256**	**253**	**256**	**268**

2023-24, Gained Spanish immersion

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	19.70	19.75	16.00	13.70	13.96	12.60
		Counseling Services	1.00		1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention	1.00	3.25	3.00	3.90	1.90	2.60
		Other	1.50	3.00	2.00	1.00	1.50	1.00
	Classified /Non-Rep	Clerical	2.00	2.00	1.50	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	3.94	8.01	3.08	2.63	1.76	0.40
		Library/Media Services						
		Other		1.94			0.50	0.68
	Admin.		2.00	2.00	2.00	2.00	1.00	1.00
School Total			**32.14**	**40.94**	**29.58**	**26.83**	**24.22**	**21.68**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	2.00	1.80	1.00	1.00	1.00
		ESL	2.00	2.50	2.50	2.50	2.94	2.00
		Other	1.00	1.00	3.00	3.00	2.00	2.00
	Classified /Non-Rep	Special Education	2.81	0.94				
		ESL	0.44	0.87	0.88	0.88		0.44
		Nutrition Services	3.25	1.88	1.88	1.88	1.88	1.88
		Custodial	2.00	4.00	3.00	3.00	3.00	3.00
		Other			4.75	3.75	3.75	3.75
CASR Total			**12.50**	**13.19**	**17.80**	**16.00**	**14.57**	**14.06**
Grand Total			**44.64**	**54.13**	**47.38**	**42.83**	**38.78**	**35.74**
Overall Students per FTE			6.2:1	4.6:1	5.8:1	6.0:1	6.6:1	7.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	16.50	16.00	16.75	15.40	14.40	13.30
		Gen Fund Equity	1.50	2.18	1.25		1.00	1.00
		Gen Fund K-5 Arts	0.50	1.00	0.50	0.90	0.90	0.80
		Foundation						
		Title I		0.25	0.26	0.40	0.16	
		SIA/M98	5.70	5.50	3.50	3.00	2.00	2.25
		Other		2.07	0.74	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.50	4.19	1.50	1.50	2.38	1.90
		Gen Fund Equity	0.50	0.24	0.10			
		Foundation						
		Title I	2.44	2.89	1.28	0.50	1.00	1.18
		SIA/M98			1.50	1.75	0.88	
		Other	1.50	4.63	0.20	0.88		
	Admin.	Gen Fund	1.50	1.50	1.50	1.00	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50	0.70		
		Title I				0.30		
		Other						
School Total			**32.14**	**40.94**	**29.58**	**26.83**	**24.22**	**21.68**

School and CASR	**Licensed**	28.20	32.50	30.30	26.70	24.90	22.60
	Classified/ Non-Rep	14.44	19.63	15.08	14.13	12.88	12.14
	Admin.	2.00	2.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Lent

5105 SE 97th Ave
503-916-6322

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,185,686	$2,518,857	$2,536,065	$2,398,019	$2,151,184	$2,046,602
Associated Payroll Costs	$1,149,435	$1,245,606	$1,245,887	$1,122,604	$1,217,671	$1,188,851
Purchased Services	$ 8,234	$ 10,536	$ 7,309	$ 17,969	$ 11,832	$ 3,140
Supplies and Materials	$ 73,478	$ 43,328	$ 34,145	$ 85,404	$ 66,823	$ 2,407
Capital				$ 1,150		
Other Objects		$ 60			$ 360	$ 336
Total	**$ 3,416,833**	**$ 3,818,388**	**$ 3,823,405**	**$ 3,625,145**	**$ 3,447,869**	**$ 3,241,336**
Dollars per Student	**$ 12,335 :1**	**$ 15,213 :1**	**$ 14,005 :1**	**$ 14,161 :1**	**$ 13,468 :1**	**$ 12,812 :1**

Note: Foundation funding ended after the 2023-24 school year.

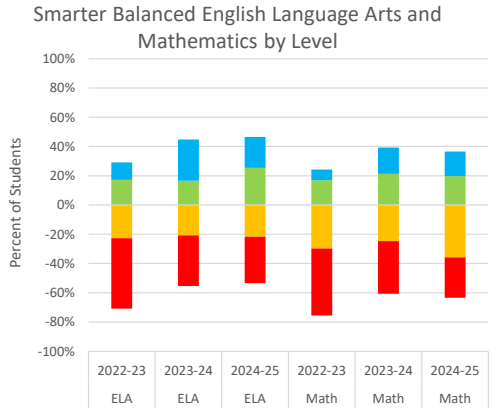
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	47%	52%	51%	62%	69%
*Students with Disabilities	15%	15%	14%	17%	20%
*English Language Learners	39%	29%	34%	44%	41%
*Free-Direct Certification	50%	50%	43%	49%	46%
Black	8%	10%	2%	2%	2%
Latino	47%	49%	65%	67%	68%
Native American	0%	0%			
Pacific Islander	1%	0%			
Multi-Race - Other Ancestry	4%	6%	3%	4%	2%
Multi-Race - Asian/White	2%	3%	3%	3%	4%
Asian	9%	7%	0%		
White	29%	24%	26%	24%	24%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: Bridger Spanish Immersion added to Lent.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	12%	28%	21%
ELA	Level 3	17%	17%	25%
ELA	Level 2	23%	21%	22%
ELA	Level 1	48%	35%	32%
	ELA Participation	97%	98%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	7%	18%	17%
Math	Level 3	17%	21%	20%
Math	Level 2	30%	25%	36%
Math	Level 1	46%	36%	28%
	Math Participation	97%	98%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Meriwether Lewis Elementary School

Lewis

4401 SE Evergreen St
503-916-6360

K-5 Constructed 1952

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	337	320	298	264	259	244	225	208
Total	**337**	**320**	**298**	**264**	**259**	**244**	**225**	**208**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	17.20	16.00	14.00	13.00	13.00	12.00
		Counseling Services	1.00	0.80	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.50
		Instructional Spec/ Coach/ Intervention	0.50	0.50	1.50	1.00	1.00	1.00
		Other	0.50	0.67	0.50			
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	0.50					0.40
		Library/Media Services		0.50	0.50			
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.70**	**21.47**	**20.50**	**18.10**	**18.10**	**17.40**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.50	3.70	3.50	2.00	2.00	2.00
		ESL	0.25	0.25	0.25	0.25	0.25	
		Other						
	Classified /Non-Rep	Special Education	4.69	3.75	3.75	2.81	2.81	2.81
		ESL						
		Nutrition Services	1.31	1.31	1.31	1.00	1.00	1.00
		Custodial	2.73	2.73	2.73	2.73	2.00	2.00
		Other						
CASR Total			**11.48**	**11.74**	**11.54**	**8.79**	**8.06**	**7.81**
Grand Total			**34.18**	**33.21**	**32.04**	**26.89**	**26.16**	**25.21**
Overall Students per FTE			9.9:1	9.6:1	9.3:1	9.8:1	9.9:1	9.7:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	17.70	16.47	15.50	13.40	13.40	12.20
		Gen Fund Equity	0.50	0.50		0.40	0.40	0.50
		Gen Fund K-5 Arts	1.00	1.00	0.50	0.80	0.80	0.80
		Foundation			0.25			
		Title I						
		SIA/M98	0.50	0.50	0.50	1.00	1.00	1.00
		Other			0.75			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation						
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.70**	**21.47**	**20.50**	**18.10**	**18.10**	**17.40**

School and CASR	**Licensed**	22.45	22.42	21.25	17.85	17.85	16.50
	Classified/ Non-Rep	10.73	9.79	9.79	8.04	7.31	7.71
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Lewis

4401 SE Evergreen St
503-916-6360

Meriwether Lewis Elementary School

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,934,014	$1,917,686	$1,982,470	$1,855,273	$1,861,955	$1,842,385
Associated Payroll Costs	$ 965,540	$ 933,447	$ 980,520	$ 910,099	$1,001,721	$1,023,397
Purchased Services	$ 6,303	$ 6,270	$ 6,235	$ 7,293	$ 11,400	$ 11,004
Supplies and Materials	$ 22,284	$ 57,128	$ 65,446	$ 45,062	$ 20,540	$ 10,944
Capital						
Other Objects		$ 250			$ 348	$ 336
Total	**$ 2,928,141**	**$ 2,914,781**	**$ 3,034,671**	**$ 2,817,727**	**$ 2,895,964**	**$ 2,888,066**
Dollars per Student	**$ 8,689 :1**	**$ 9,109 :1**	**$ 10,183 :1**	**$ 10,673 :1**	**$ 11,181 :1**	**$ 11,836 :1**

Note: Foundation funding ended after the 2023-24 school year.

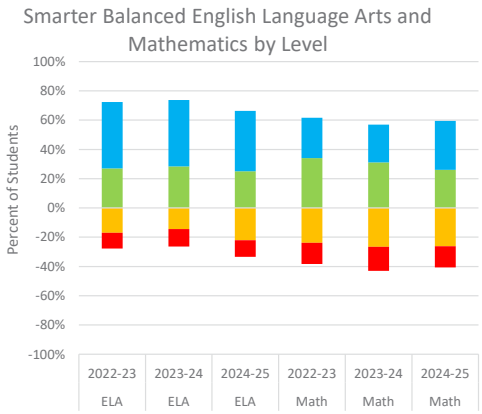
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	25%	28%	30%	32%	34%
*Students with Disabilities	18%	20%	23%	24%	23%
*English Language Learners	2%	2%	3%	3%	1%
*Free-Direct Certification	15%	13%	23%	22%	22%
Black	1%	1%	1%	2%	2%
Latino	9%	9%	11%	13%	12%
Native American					
Pacific Islander					
Multi-Race - Other Ancestry	6%	7%	7%	7%	8%
Multi-Race - Asian/White	5%	5%	5%	5%	8%
Asian	3%	3%	4%	5%	6%
White	76%	75%	73%	68%	65%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: losing neighborhood students to Whitman.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	45%	45%	41%
ELA	Level 3	27%	28%	25%
ELA	Level 2	17%	15%	22%
ELA	Level 1	11%	12%	11%
	ELA Participation	98%	96%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	28%	26%	33%
Math	Level 3	34%	31%	26%
Math	Level 2	24%	27%	26%
Math	Level 1	15%	17%	15%
	Math Participation	98%	96%	95%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Lincoln

1750 SW Salmon St
503-916-5200

9-12 Reconstructed 2022

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	1284	1342	1387	1430	1469	1471	1438	1427
Spanish Immersion	178	186	192	185	178	182	166	168
Total	**1462**	**1528**	**1579**	**1615**	**1647**	**1653**	**1604**	**1595**

New building opened 2022-23 SY. Boundary change with Ida. B. Wells-Barnett explains enrollment decline up to 2019-20.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	68.09	70.26	71.58	74.74	73.75	70.51
		Counseling Services	5.00	5.00	5.00	5.50	5.50	5.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	2.83	2.00	1.50	1.83	2.00	1.99
		Other	1.00	1.00	1.00	1.67	1.00	0.20
	Classified /Non-Rep	Clerical	6.90	7.30	7.05	6.45	5.40	4.40
		Ed. Assistant/ Paraeducator						
		Library/Media Services	0.60	0.75	0.60			
		Other	3.50	4.00	5.00	4.00	3.00	3.00
	Admin.		4.00	4.00	4.00	4.00	5.00	5.00
School Total			**92.92**	**95.31**	**96.73**	**99.19**	**96.65**	**91.10**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.50	5.60	7.30	6.50	6.50	7.50
		ESL	1.00	0.50	0.50	1.00	1.00	0.50
		Other	1.00					
	Classified /Non-Rep	Special Education	1.88	5.63	8.44	8.44	8.44	8.44
		ESL						
		Nutrition Services	1.69	2.06	2.06	3.00	3.63	3.63
		Custodial	13.73	15.00	14.00	14.00	14.00	14.00
		Other	3.00	3.00	4.00	4.00	4.00	4.00
CASR Total			**24.79**	**31.79**	**36.31**	**36.94**	**37.57**	**38.07**
Grand Total			**117.71**	**127.10**	**133.04**	**136.14**	**134.22**	**129.17**
Overall Students per FTE			12.4:1	12.0:1	11.9:1	11.9:1	12.3:1	12.8:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	71.95	71.22	73.68	74.70	77.42	74.20
		Gen Fund Equity				2.33	1.45	0.75
		Gen Fund K-5 Arts						
		Foundation	1.04	1.91	0.81	3.50		
		Title I						
		SIA/M98	3.83	4.50	4.17	3.50	3.00	3.33
		Other	1.10	1.63	1.42	0.72	1.38	0.42
	Classified/ Non-Rep	Gen Fund	8.40	9.05	9.65	6.62	4.85	3.60
		Gen Fund Equity				1.67	1.55	2.50
		Foundation	0.60			0.17		
		Title I						
		SIA/M98	2.00	2.00	2.00	2.00	2.00	1.00
		Other		1.00	1.00			0.30
	Admin.	Gen Fund	4.00	4.00	4.00	4.00	5.00	5.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**92.92**	**95.31**	**96.73**	**99.19**	**96.65**	**91.10**

School and CASR	**Licensed**	82.42	85.36	87.88	92.24	90.75	86.70
	Classified/ Non-Rep	31.29	37.74	41.16	39.90	38.47	37.47
	Admin.	4.00	4.00	4.00	4.00	5.00	5.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Lincoln

1750 SW Salmon St
503-916-5200

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$8,042,766	$8,673,079	$9,394,730	$10,252,759	$10,158,311	$9,794,157
Associated Payroll Costs	$3,791,347	$3,964,045	$4,431,448	$4,755,071	$5,455,615	$5,483,455
Purchased Services	$ 55,310	$ 43,009	$ 63,931	$ 48,785	$ 69,288	$ 46,208
Supplies and Materials	$ 549,350	$ 918,531	$ 910,638	$ 659,503	$ 264,568	$ 331,777
Capital		$ 6,585	$ 165			$ 3,800
Other Objects	$ 37,824	$ 90,879	$ 23,973	$ 28,381	$ 2,088	$ 28,698
Total	**$12,476,597**	**$13,696,128**	**$14,824,885**	**$15,744,498**	**$15,949,870**	**$15,688,095**
Dollars per Student	**$ 8,534 :1**	**$ 8,963 :1**	**$ 9,389 :1**	**$ 9,749 :1**	**$ 9,684 :1**	**$ 9,491 :1**

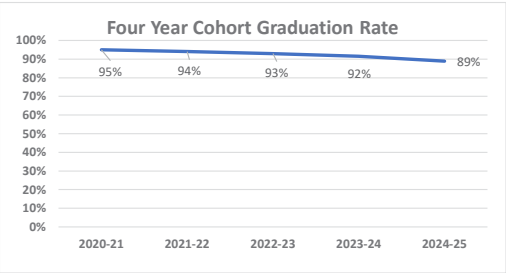
Note: Foundation funding ended after the 2023-24 school year.

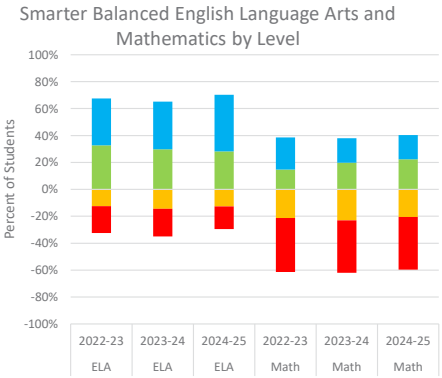
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*		3%	7%	13%	19%
*Students with Disabilities	5%	6%	8%	8%	9%
*English Language Learners	1%	1%	2%	3%	2%
*Free-Direct Certification	5%	7%	11%	12%	11%
Black	2%	3%	3%	4%	5%
Latino	12%	11%	10%	12%	11%
Native American	0%	0%	0%	0%	0%
Pacific Islander	0%	0%	0%	0%	
Multi-Race - Other Ancestry	4%	5%	5%	5%	5%
Multi-Race - Asian/White	7%	8%	8%	9%	9%
Asian	9%	10%	10%	9%	9%
White	65%	63%	64%	61%	60%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	35%	35%	42%
ELA	Level 3	33%	30%	28%
ELA	Level 2	12%	14%	13%
ELA	Level 1	20%	21%	17%
	ELA Participation	75%	78%	80%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	24%	18%	18%
Math	Level 3	15%	20%	22%
Math	Level 2	21%	23%	21%
Math	Level 1	40%	39%	39%
	Math Participation	54%	60%	59%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Llewellyn

6301 SE 14th Ave
503-916-6216

K-5 Constructed 1928

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	395	415	393	373	345	333	312	304
Total	**395**	**415**	**393**	**373**	**345**	**333**	**312**	**304**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	20.50	18.40	21.40	17.20	16.20	15.20
		Counseling Services	2.00	1.50	1.00	1.50	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention			1.00	2.00	2.00	0.90
		Other			0.50			0.60
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator		1.40		0.75		0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**26.00**	**24.80**	**27.40**	**24.55**	**22.30**	**21.20**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.50	4.40	4.30	3.50	3.50	3.50
		ESL	0.25	0.25	0.25	0.25		
		Other						
	Classified /Non-Rep	Special Education	7.50	5.63	7.50	8.44	8.44	7.50
		ESL						
		Nutrition Services	1.31	1.31	1.31	1.31	1.31	1.31
		Custodial	2.73	2.73	2.73	2.73	2.00	2.00
		Other	0.88	0.88	0.88	0.88	0.88	
CASR Total			**16.17**	**15.19**	**16.97**	**17.11**	**16.13**	**14.32**
Grand Total			**42.17**	**39.99**	**44.37**	**41.66**	**38.43**	**35.52**
Overall Students per FTE			9.4:1	10.4:1	8.9:1	9.0:1	9.0:1	9.4:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	21.00	18.70	20.90	17.80	16.60	15.60
		Gen Fund Equity				0.50	0.50	0.50
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	1.20
		Foundation	0.50	0.20	0.37	0.30		
		Title I						
		SIA/M98	0.50	0.50	1.50	1.50	1.50	1.00
		Other			0.63			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation		1.40		0.75		
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**26.00**	**24.80**	**27.40**	**24.55**	**22.30**	**21.20**

School and CASR	**Licensed**	26.75	25.05	28.95	25.05	23.30	21.80
	Classified/ Non-Rep	14.42	13.94	14.42	15.61	14.13	12.72
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Llewellyn

6301 SE 14th Ave
503-916-6216

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,163,021	$2,189,896	$2,633,850	$2,466,653	$2,364,802	$2,266,320
Associated Payroll Costs	$1,080,555	$1,050,043	$1,279,604	$1,178,225	$1,257,947	$1,265,363
Purchased Services	$ 7,097	$ 14,283	$ 9,686	$ 10,770	$ 14,232	$ 13,812
Supplies and Materials	$ 49,957	$ 26,310	$ 47,856	$ 32,266	$ 14,196	$ 13,764
Capital	$ 10,717	$ 266	$ 39	$ 870		
Other Objects					$ 432	$ 420
Total	**$ 3,311,347**	**$ 3,280,797**	**$ 3,971,035**	**$ 3,688,784**	**$ 3,651,609**	**$ 3,559,679**
Dollars per Student	**$ 8,383 :1**	**$ 7,906 :1**	**$ 10,104 :1**	**$ 9,890 :1**	**$ 10,584 :1**	**$ 10,690 :1**

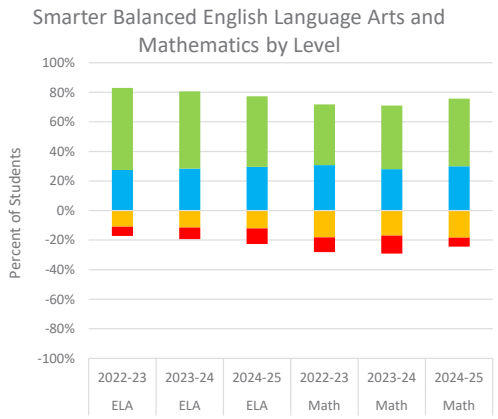
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	21%	23%	26%	30%	33%
*Students with Disabilities	17%	19%	22%	23%	25%
*English Language Learners	1%	1%	2%	1%	1%
*Free-Direct Certification	8%	9%	13%	13%	13%
Black	1%	1%	1%	1%	2%
Latino	12%	12%	12%	11%	10%
Native American		0%	0%	1%	1%
Pacific Islander					
Multi-Race - Other Ancestry	6%	4%	4%	3%	3%
Multi-Race - Asian/White	5%	7%	6%	5%	6%
Asian	2%	1%	2%	2%	2%
White	74%	75%	75%	77%	77%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	55%	52%	48%
ELA	Level 3	28%	28%	30%
ELA	Level 2	11%	11%	12%
ELA	Level 1	6%	8%	11%
	ELA Participation	99%	96%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	41%	43%	46%
Math	Level 3	31%	28%	30%
Math	Level 2	18%	17%	18%
Math	Level 1	10%	12%	6%
	Math Participation	99%	96%	93%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Maplewood

7452 SW 52nd Ave
503-916-6308

K-5 Constructed 1948

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	291	310	301	295	287	288	279	266
Total	**291**	**310**	**301**	**295**	**287**	**288**	**279**	**266**

Facility improvement to support more capacity starting 2019-20 SY.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	15.00	14.50	13.50	13.60	13.60	13.60
		Counseling Services	1.00	1.00	1.50	1.00	1.50	1.50
		Library/Media Services	1.00	0.80	0.75	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention	1.00	1.50	1.00	1.50	1.50	1.00
		Other	0.50	0.50				
	Classified /Non-Rep	Clerical	2.00	1.80	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	1.30	1.50	1.50	1.20		0.40
		Library/Media Services						
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.80**	**22.60**	**20.75**	**20.40**	**19.70**	**19.60**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.60	2.30	2.50	2.50	2.00
		ESL	0.25	0.25	0.50	0.50	0.50	0.25
		Other						
	Classified /Non-Rep	Special Education	0.94	2.81	3.75	5.63	6.57	5.63
		ESL						
		Nutrition Services	0.94	0.94	1.00	1.00	1.00	1.00
		Custodial	2.00	2.00	2.00	2.00	2.00	2.00
		Other						
CASR Total			**5.13**	**7.60**	**9.55**	**11.63**	**12.57**	**10.88**
Grand Total			**27.93**	**30.20**	**30.30**	**32.03**	**32.27**	**30.48**
Overall Students per FTE			10.4:1	10.3:1	9.9:1	9.2:1	8.9:1	9.4:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	16.00	15.10	14.55	14.40	14.40	14.90
		Gen Fund Equity					0.50	
		Gen Fund K-5 Arts	1.00	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I						
		SIA/M98	1.50	1.50	1.50	1.50	1.50	1.00
		Other		1.20	0.20			
	Classified/ Non-Rep	Gen Fund	2.40	1.80	1.50	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation	0.90	0.62	1.01	1.20		
		Title I						
		SIA/M98						
		Other		0.88	0.49			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.80**	**22.60**	**20.75**	**20.40**	**19.70**	**19.60**

School and CASR	**Licensed**	19.75	20.15	19.55	19.70	20.20	18.95
	Classified/ Non-Rep	7.18	9.05	9.75	11.33	11.07	10.53
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Maplewood

7452 SW 52nd Ave
503-916-6308

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,815,141	$1,864,938	$1,898,629	$1,977,406	$1,996,443	$2,065,632
Associated Payroll Costs	$ 874,968	$ 883,813	$ 938,628	$ 967,943	$1,086,172	$1,156,926
Purchased Services	$ 4,169	$ 16,028	$ 31,154	$ 16,357	$ 12,096	$ 12,804
Supplies and Materials	$ 58,401	$ 68,785	$ 77,594	$ 48,393	$ 12,060	$ 12,768
Capital						
Other Objects					$ 360	$ 384
Total	**$ 2,752,680**	**$ 2,833,565**	**$ 2,946,005**	**$ 3,010,098**	**$ 3,107,131**	**$ 3,248,514**
Dollars per Student	**$ 9,459 :1**	**$ 9,141 :1**	**$ 9,787 :1**	**$ 10,204 :1**	**$ 10,826 :1**	**$ 11,280 :1**

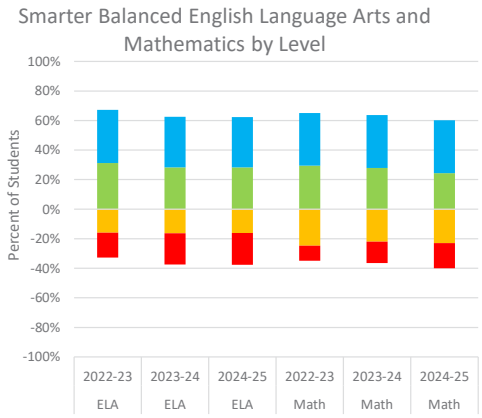
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	20%	23%	26%	30%	31%
*Students with Disabilities	9%	11%	15%	14%	16%
*English Language Learners	2%	3%	6%	5%	3%
*Free-Direct Certification	11%	13%	18%	22%	19%
Black	2%	1%	1%	1%	2%
Latino	9%	12%	11%	13%	11%
Native American			1%	1%	1%
Pacific Islander	0%				
Multi-Race - Other Ancestry	4%	3%	6%	5%	7%
Multi-Race - Asian/White	8%	8%	10%	10%	11%
Asian	2%	2%	1%	1%	1%
White	76%	74%	71%	69%	67%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	36%	34%	34%
ELA	Level 3	31%	28%	28%
ELA	Level 2	16%	16%	16%
ELA	Level 1	17%	21%	22%
	ELA Participation	96%	95%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	36%	36%	36%
Math	Level 3	30%	28%	24%
Math	Level 2	25%	22%	23%
Math	Level 1	10%	15%	17%
	Math Participation	95%	95%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Markham

10531 SW Capitol Hwy
503-916-5681

Title I School for 2026-27

K-5 Constructed 1950

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	424	426	402	341	339	327	315	325
Total	**424**	**426**	**402**	**341**	**339**	**327**	**315**	**325**

Building closed for repair spring and fall of 2024.

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	23.20	21.36	21.90	19.20	16.20	16.20
		Counseling Services	1.50	1.55	1.00	1.20	1.00	1.50
		Library/Media Services	1.00	0.80	1.00	0.80	0.60	0.60
		Instructional Spec/ Coach/ Intervention		0.50	1.00	2.00	1.50	2.00
		Other			1.00			
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	0.50		0.88			0.40
		Library/Media Services						
		Other						
	Admin.		1.00	2.00	1.00	1.00	1.00	1.00
School Total			**29.20**	**28.21**	**29.78**	**25.70**	**21.80**	**23.20**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.50	4.70	4.20	2.50	2.00	2.00
		ESL	1.50	2.00	2.00	1.50	1.50	1.00
		Other						
	Classified /Non-Rep	Special Education	7.50	5.63	7.50	5.63	5.63	6.57
		ESL	0.44	0.44	0.44	0.44	0.44	
		Nutrition Services	1.69	2.00	1.94	1.69	2.06	2.06
		Custodial	4.00	3.00	1.00	3.00	3.00	3.00
		Other						
CASR Total			**17.63**	**17.77**	**17.08**	**14.75**	**14.63**	**14.63**
Grand Total			**46.83**	**45.98**	**46.86**	**40.45**	**36.43**	**37.83**
Overall Students per FTE			9.1:1	9.3:1	8.6:1	8.4:1	9.3:1	8.6:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	21.53	18.95	20.15	19.00	15.60	16.10
		Gen Fund Equity	2.42	1.59	2.25	1.00	1.00	1.00
		Gen Fund K-5 Arts	1.00	0.96	1.00	1.20	1.20	1.20
		Foundation						
		Title I						0.50
		SIA/M98	0.75	1.50	2.00	2.00	1.50	1.50
		Other		1.21	0.50			
	Classified/ Non-Rep	Gen Fund	2.00	1.50	2.38	1.50	1.50	1.90
		Gen Fund Equity	0.16	0.50	0.50			
		Foundation	0.14					
		Title I						
		SIA/M98						
		Other	0.20					
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity		0.50				
		Title I						
		Other		0.50				
School Total			**29.20**	**28.21**	**29.78**	**25.70**	**21.80**	**23.20**

School and CASR	**Licensed**	29.70	30.91	32.10	27.20	22.80	23.30
	Classified/ Non-Rep	16.13	13.07	13.76	12.25	12.63	13.53
	Admin.	1.00	2.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Markham

10531 SW Capitol Hwy
503-916-5681

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,187,990	$2,345,284	$2,470,954	$2,339,374	$2,116,923	$2,272,167
Associated Payroll Costs	$1,104,800	$1,169,222	$1,255,223	$1,197,742	$1,182,264	$1,313,858
Purchased Services	$ 82,191	$ 19,191	$ 23,428	$ 11,272	$ 14,592	$ 13,992
Supplies and Materials	$ 50,879	$ 50,536	$ 81,619	$ 68,493	$ 71,683	$ 13,944
Capital	$ 100		$ 6,689			
Other Objects					$ 444	$ 420
Total	**$ 3,425,959**	**$ 3,584,233**	**$ 3,837,914**	**$ 3,616,882**	**$ 3,385,906**	**$ 3,614,381**
Dollars per Student	**$ 8,080 :1**	**$ 8,414 :1**	**$ 9,547 :1**	**$ 10,607 :1**	**$ 9,988 :1**	**$ 11,053 :1**

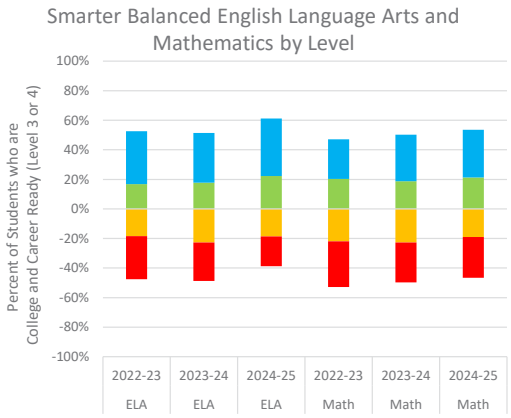
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	25%	27%	31%	40%	49%
*Students with Disabilities	15%	17%	17%	11%	13%
*English Language Learners	16%	17%	18%	15%	15%
*Free-Direct Certification	28%	26%	32%	33%	38%
Black	18%	16%	16%	16%	17%
Latino	9%	11%	13%	16%	15%
Native American	0%	1%	0%		
Pacific Islander	2%	2%	2%	2%	3%
Multi-Race - Other Ancestry	6%	8%	6%	4%	6%
Multi-Race - Asian/White	4%	4%	4%	4%	5%
Asian	5%	5%	5%	6%	6%
White	56%	56%	55%	51%	49%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	36%	34%	39%
ELA	Level 3	17%	18%	22%
ELA	Level 2	18%	23%	19%
ELA	Level 1	29%	26%	20%
	ELA Participation	97%	97%	93%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	27%	32%	32%
Math	Level 3	20%	19%	21%
Math	Level 2	22%	23%	19%
Math	Level 1	31%	27%	28%
	Math Participation	98%	97%	94%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



MLK Jr

4906 NE 6th Ave
503-916-6456

Title I School for 2026-27

K-5 Constructed 1925

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	128	116	124	133	126	125	133	143
Mandarin Immersion	169	186	183	179	193	189	201	201
Total	**297**	**302**	**307**	**312**	**319**	**314**	**334**	**344**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	18.50	21.16	18.65	17.40	17.45	16.45
		Counseling Services	1.50	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.80	0.80	0.60
		Instructional Spec/ Coach/ Intervention	4.40	3.50	2.00	2.10	1.50	2.00
		Other	1.00	1.50	2.00	2.00	2.00	1.00
	Classified /Non-Rep	Clerical	1.50	1.50	2.00	2.00	2.00	1.70
		Ed. Assistant/ Paraeducator	6.51	7.13	5.43	3.92	4.87	1.88
		Library/Media Services						
		Other	1.00	1.94	0.94	0.88		
	Admin.		2.00	1.00	1.00	1.00	1.00	1.00
School Total			**37.41**	**39.72**	**34.02**	**31.09**	**30.62**	**25.63**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.60	1.60	1.00	1.00	1.00
		ESL	1.00	1.00	1.00	1.00	0.50	0.50
		Other			2.00	5.00	5.00	5.00
	Classified /Non-Rep	Special Education			0.94	0.94	0.94	0.94
		ESL			0.44			
		Nutrition Services	2.13	2.31	2.31	2.31	2.31	2.31
		Custodial	4.00	4.00	4.00	4.00	4.00	4.00
		Other	0.88		4.19	15.13	15.75	14.75
CASR Total			**9.00**	**8.91**	**16.48**	**29.38**	**29.50**	**28.50**
Grand Total			**46.41**	**48.64**	**50.50**	**60.47**	**60.12**	**54.13**
Overall Students per FTE			6.4:1	6.2:1	6.1:1	5.2:1	5.3:1	5.8:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	18.45	19.31	18.90	18.30	18.00	16.75
		Gen Fund Equity	2.30	2.50	2.50	1.00	1.00	1.00
		Gen Fund K-5 Arts	1.00	1.00	0.50	1.20	1.20	1.20
		Foundation						
		Title I	1.65	0.35			0.05	0.10
		SIA/M98	2.00	3.00	2.50	2.30	2.00	1.75
		Other	1.00	2.00	0.25	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.88	2.00	1.50	4.13	1.90
		Gen Fund Equity						
		Foundation						
		Title I	4.63	5.06	4.43	2.18	1.87	0.80
		SIA/M98			1.00	2.63	0.88	0.88
		Other	2.88	3.63	0.94	0.49		
	Admin.	Gen Fund	1.50	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity	0.50					
		Title I						
		Other						
School Total			**37.41**	**39.72**	**34.02**	**31.09**	**30.62**	**25.63**

School and CASR	**Licensed**	28.40	30.76	29.25	30.30	29.25	27.55
	Classified/ Non-Rep	16.01	16.88	20.25	29.17	29.87	25.58
	Admin.	2.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

MLK Jr

4906 NE 6th Ave
503-916-6456



Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,643,303	$2,871,349	$2,761,787	$2,651,513	$2,741,140	$2,435,814
Associated Payroll Costs	$1,356,121	$1,506,005	$1,392,605	$1,327,352	$1,538,470	$1,407,771
Purchased Services	$ 40,696	$ 15,254	$ 35,149	$ 19,661	$ 12,924	$ 3,100
Supplies and Materials	$ 41,886	$ 56,285	$ 85,813	$ 50,982	$ 69,829	$ 4,228
Capital		$ 1,515	$ 50			
Other Objects				$ 160	$ 384	$ 300
Total	**$ 4,082,006**	**$ 4,450,406**	**$ 4,275,404**	**$ 4,049,668**	**$ 4,362,746**	**$ 3,851,213**
Dollars per Student	**$ 13,744 :1**	**$ 14,736 :1**	**$ 13,926 :1**	**$ 12,980 :1**	**$ 13,676 :1**	**$ 12,265 :1**

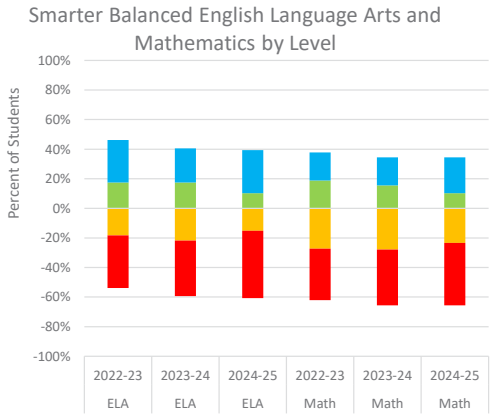
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	36%	36%	44%	50%	57%
*Students with Disabilities	9%	9%	10%	14%	18%
*English Language Learners	13%	12%	11%	12%	10%
*Free-Direct Certification	44%	41%	46%	51%	51%
Black	31%	25%	28%	31%	31%
Latino	18%	20%	19%	21%	19%
Native American	1%	0%			
Pacific Islander	2%	2%	1%	0%	1%
Multi-Race - Other Ancestry	9%	8%	9%	10%	12%
Multi-Race - Asian/White	6%	8%	8%	8%	8%
Asian	6%	6%	6%	3%	5%
White	28%	31%	30%	27%	24%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	29%	23%	29%
ELA	Level 3	17%	17%	10%
ELA	Level 2	18%	22%	15%
ELA	Level 1	36%	37%	46%
	ELA Participation	99%	100%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	19%	19%	24%
Math	Level 3	19%	16%	10%
Math	Level 2	27%	28%	23%
Math	Level 1	35%	38%	42%
	Math Participation	99%	99%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Marysville

7733 SE Raymond
503-916-6363

The Oregon Department of Education has identified this school as a Targeted Supports for Improvement (TSI) school. Title I School for 2026-27

K-5 Constructed 1921

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	248	286	359	320	307	299	297	304
Total	**248**	**286**	**359**	**320**	**307**	**299**	**297**	**304**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.25	16.00	20.80	18.45	13.60	15.20
		Counseling Services	1.00	1.00	1.50	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	1.50	2.00	4.50	3.25	2.00	2.00
		Other	0.50	1.00	1.10	1.50	1.20	1.00
	Classified /Non-Rep	Clerical	2.00	3.00	3.00	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	3.19	7.13	2.19	2.63	2.88	1.28
		Library/Media Services						
		Other		1.00	0.94			
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**25.44**	**34.13**	**37.03**	**31.83**	**25.68**	**25.48**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.00	4.80	3.30	3.00	3.00	3.00
		ESL	1.00	1.00	1.50	1.50	1.00	1.00
		Other			2.00	2.00	2.00	2.00
	Classified /Non-Rep	Special Education	7.50	6.57	6.57	6.57	5.63	3.75
		ESL			0.44	0.44		
		Nutrition Services	2.25	2.00	2.38	2.00	2.00	2.00
		Custodial	2.73	2.73	3.73	2.73	2.73	2.73
		Other			6.31	3.63	2.75	2.75
CASR Total			**17.48**	**17.09**	**26.22**	**21.86**	**19.10**	**17.23**
Grand Total			**42.92**	**51.22**	**63.25**	**53.68**	**44.78**	**42.70**
Overall Students per FTE			5.8:1	5.6:1	5.7:1	6.0:1	6.9:1	7.0:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.85	14.75	18.70	18.10	14.40	14.60
		Gen Fund Equity	0.68	1.68	2.80	1.90	0.30	0.60
		Gen Fund K-5 Arts	0.50	0.50	1.00	1.20	0.80	1.20
		Foundation						
		Title I	0.32	0.08	1.08		0.30	0.84
		SIA/M98	2.90	2.00	4.00	3.50	2.50	2.55
		Other		2.00	1.32	0.50	0.50	0.41
	Classified/ Non-Rep	Gen Fund	1.50	2.00	1.40	1.50	1.50	1.90
		Gen Fund Equity	0.24	0.25				
		Foundation						
		Title I	2.19	4.63	2.35	0.88	1.22	0.50
		SIA/M98			1.00	1.75	1.75	0.88
		Other	1.26	4.25	1.38	0.50	0.41	
	Admin.	Gen Fund	1.50	1.50	1.50	1.00	1.50	1.72
		Gen Fund Equity	0.50	0.50	0.50	0.07	0.50	0.28
		Title I				0.93		
		Other						
School Total			**25.44**	**34.13**	**37.03**	**31.83**	**25.68**	**25.48**

School and CASR	**Licensed**	23.25	26.80	35.70	31.70	24.80	26.20
	Classified/ Non-Rep	17.67	22.42	25.55	19.98	17.98	14.50
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Marysville

7733 SE Raymond
503-916-6363

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,994,926	$2,537,191	$3,247,817	$3,089,668	$2,483,761	$2,538,403
Associated Payroll Costs	$ 957,396	$1,202,703	$1,559,917	$1,489,752	$1,374,363	$1,449,768
Purchased Services	$ 10,198	$ 29,026	$ 43,003	$ 25,753	$ 17,821	$ 13,032
Supplies and Materials	$ 69,285	$ 59,609	$ 60,598	$ 40,675	$ 71,357	$ 34,688
Capital	$ 188	$ 1,946	$ 20,320			
Other Objects					$ 384	$ 396
Total	**$ 3,031,993**	**$ 3,830,474**	**$ 4,931,655**	**$ 4,645,848**	**$ 3,947,686**	**$ 4,036,287**
Dollars per Student	**$ 12,226 :1**	**$ 13,393 :1**	**$ 13,737 :1**	**$ 14,518 :1**	**$ 12,859 :1**	**$ 13,499 :1**

Note: Foundation funding ended after the 2023-24 school year.

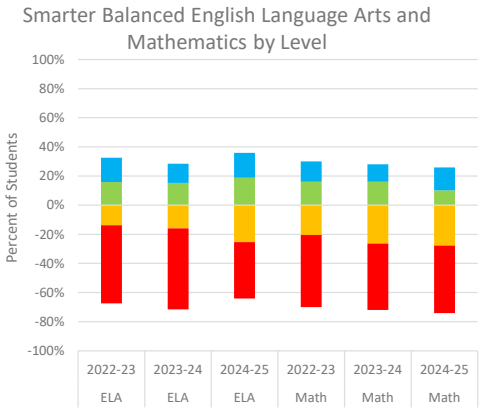
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	41%	44%	50%	57%	71%
*Students with Disabilities	19%	18%	14%	20%	22%
*English Language Learners	14%	12%	17%	12%	14%
*Free-Direct Certification	49%	45%	62%	60%	58%
Black	4%	7%	9%	12%	12%
Latino	23%	21%	20%	19%	21%
Native American	2%	2%	1%	2%	2%
Pacific Islander	2%	3%	5%	3%	5%
Multi-Race - Other Ancestry	10%	10%	13%	10%	11%
Multi-Race - Asian/White	3%	4%	3%	2%	2%
Asian	10%	9%	12%	10%	11%
White	47%	44%	38%	43%	36%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: gaining neighborhood students from Arleta. Losing neighborhood students to Whitman.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	17%	13%	17%
ELA	Level 3	16%	15%	19%
ELA	Level 2	14%	16%	25%
ELA	Level 1	54%	56%	39%
	ELA Participation	99%	94%	94%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	14%	12%	16%
Math	Level 3	16%	16%	10%
Math	Level 2	20%	26%	28%
Math	Level 1	50%	46%	46%
	Math Participation	99%	94%	92%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

McDaniel

2735 NE 82nd Ave
503-916-5220

9-12 Reconstructed 2021

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	1199	1228	1380	1375	1325	1267	1205	1142
Spanish Immersion	130	161	204	214	205	195	180	177
Vietnamese Immersion					34	51	62	78
PISA	40	54	66	97	65	74	78	77
Mandarin Immersion								
Total	**1369**	**1443**	**1650**	**1686**	**1629**	**1587**	**1525**	**1474**

Boundary change with Grant starting 2019-20 SY.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	67.39	73.86	82.03	78.74	75.44	73.51
		Counseling Services	5.00	5.00	5.00	5.00	5.50	5.50
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	2.75	2.30	2.50	3.50	3.50	3.00
		Other	4.20	4.00	5.00	4.00	4.00	4.00
	Classified /Non-Rep	Clerical	7.50	9.50	10.50	8.50	9.50	9.50
		Ed. Assistant/ Paraeducator	0.50					
		Library/Media Services		0.50	0.50			
		Other	6.50	7.44	7.44	6.44	5.94	3.44
	Admin.		4.00	3.00	3.00	4.00	5.00	5.00
School Total			**98.85**	**106.60**	**116.97**	**111.18**	**109.87**	**104.94**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	10.50	13.00	13.40	11.50	11.00	11.50
		ESL	5.50	9.09	8.72	9.44	7.81	6.88
		Other	1.00					
	Classified /Non-Rep	Special Education	13.13	14.07	15.01	15.01	17.82	16.88
		ESL	1.38	1.38	1.38	2.38	1.88	1.88
		Nutrition Services	3.56	4.06	4.13	4.13	4.19	4.19
		Custodial	10.73	11.73	10.73	11.73	10.73	10.73
		Other	4.50	4.00	5.00	4.00	4.00	4.00
CASR Total			**50.30**	**57.32**	**58.35**	**58.18**	**57.43**	**56.05**
Grand Total			**149.14**	**163.92**	**175.32**	**169.35**	**167.30**	**160.99**
Overall Students per FTE			9.2:1	8.8:1	9.4:1	10.0:1	9.7:1	9.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	64.42	67.31	78.18	79.51	75.42	69.24
		Gen Fund Equity	7.41	8.47	9.35	8.22	9.00	8.27
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	8.00	9.00	7.33	4.50	5.00	9.50
		Other	0.52	1.38	0.67		0.02	
	Classified/ Non-Rep	Gen Fund	10.00	12.19	12.92	8.50	11.44	9.94
		Gen Fund Equity	2.00	3.25	3.42	3.94	2.00	2.00
		Foundation						
		Title I						
		SIA/M98	2.00	2.00	2.00	2.00	2.00	1.00
		Other	0.50		0.10	0.50		
	Admin.	Gen Fund	3.00	3.00	3.00	4.00	5.00	5.00
		Title I						
		Gen Fund Equity	1.00					
		Other						
School Total			**98.85**	**106.60**	**116.97**	**111.18**	**109.87**	**104.94**

School and CASR	**Licensed**	97.35	108.25	117.65	113.18	108.25	105.38
	Classified/ Non-Rep	47.80	52.67	54.67	52.17	54.05	50.61
	Admin.	4.00	3.00	3.00	4.00	5.00	5.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

McDaniel

2735 NE 82nd Ave
503-916-5220

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$8,088,257	$9,412,218	$11,243,229	$11,597,990	$11,558,586	$11,377,274
Associated Payroll Costs	$3,910,032	$4,639,659	$5,522,759	$5,662,720	$6,378,462	$6,542,406
Purchased Services	$ 84,495	$ 147,236	$ 101,350	$ 272,058	$ 135,449	$ 69,264
Supplies and Materials	$ 319,780	$ 368,985	$ 469,823	$ 434,933	$ 80,860	$ 180,850
Capital	$ 51,410			$ 1,567		
Other Objects	$ 11,970	$ 9,361	$ 6,300	$ 1,360	$ 2,136	$ 2,088
Total	**$12,465,943**	**$14,577,459**	**$17,343,461**	**$17,970,629**	**$18,155,493**	**$18,171,882**
Dollars per Student	**$ 9,106 :1**	**$ 10,102 :1**	**$ 10,511 :1**	**$ 10,659 :1**	**$ 11,145 :1**	**$ 11,450 :1**

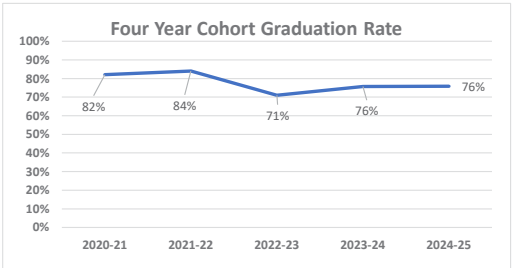
Note: Foundation funding ended after the 2023-24 school year.

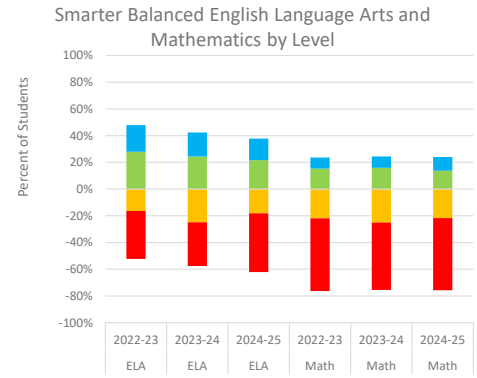
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	1%	12%	22%	34%	52%
*Students with Disabilities	14%	14%	14%	14%	13%
*English Language Learners	14%	16%	16%	19%	20%
*Free-Direct Certification	29%	28%	41%	44%	41%
Black	14%	12%	13%	12%	13%
Latino	24%	26%	26%	28%	28%
Native American	1%	1%	1%	1%	1%
Pacific Islander	2%	2%	1%	1%	2%
Multi-Race - Other Ancestry	9%	8%	7%	6%	6%
Multi-Race - Asian/White	2%	2%	2%	2%	2%
Asian	12%	12%	11%	12%	11%
White	37%	37%	39%	38%	38%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	20%	18%	16%
ELA	Level 3	28%	24%	22%
ELA	Level 2	16%	25%	18%
ELA	Level 1	36%	33%	44%
	ELA Participation	54%	62%	54%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	8%	9%	10%
Math	Level 3	15%	16%	14%
Math	Level 2	22%	25%	22%
Math	Level 1	54%	51%	54%
	Math Participation	54%	38%	41%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Metro. Learning Center

2033 NW Glisan St
503-916-5737

K-12 *Constructed 1915*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	341	348	336	319	275	266	245	232
Total	**341**	**348**	**336**	**319**	**275**	**266**	**245**	**232**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	21.36	21.67	21.50	21.50	19.20	19.20
		Counseling Services	1.50	1.50	1.50	2.00	2.00	2.00
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention	0.75	1.19	1.50	1.00	2.00	1.00
		Other	1.00	1.00	1.00	1.00	0.50	0.50
	Classified /Non-Rep	Clerical	2.50	2.75	3.00	2.70	3.00	2.50
		Ed. Assistant/ Paraeducator	0.50	0.50	0.50	0.50	1.38	0.40
		Library/Media Services	0.50	0.50	0.50			
		Other	1.90	1.40	1.40	1.40		
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**32.51**	**33.01**	**33.40**	**32.60**	**30.58**	**28.10**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.00	4.00	3.00	3.00	2.00
		ESL						
		Other						
	Classified /Non-Rep	Special Education	1.88	1.88	1.88	1.88	1.88	1.88
		ESL						
		Nutrition Services	0.81	0.81	0.75	0.88	0.88	0.88
		Custodial	2.00	2.00	2.00	2.00	2.00	2.00
		Other		1.00	1.00	1.00	1.00	1.00
CASR Total			**7.69**	**9.69**	**9.63**	**8.75**	**8.75**	**7.75**
Grand Total			**40.20**	**42.70**	**43.03**	**41.35**	**39.33**	**35.85**
Overall Students per FTE			8.5:1	8.2:1	7.8:1	7.7:1	7.0:1	7.4:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	19.88	20.11	21.25	21.85	21.05	20.30
		Gen Fund Equity	1.00	1.00	0.50	0.50	0.50	
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.40	0.40	0.40
		Foundation						
		Title I						
		SIA/M98	3.74	4.00	3.25	3.25	2.25	2.50
		Other		0.25	0.50			
	Classified/ Non-Rep	Gen Fund	4.15	4.15	3.50	4.10	4.13	2.90
		Gen Fund Equity			0.50			
		Foundation						
		Title I						
		SIA/M98	0.75	0.50	0.50	0.50	0.25	
		Other	0.50	0.50	0.90			
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**32.51**	**33.01**	**33.40**	**32.60**	**30.58**	**28.10**

School and CASR	**Licensed**	28.11	29.86	30.00	29.00	27.20	25.20
	Classified/ Non-Rep	10.09	10.84	11.03	10.35	10.13	8.65
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Metro. Learning Center

2033 NW Glisan St
503-916-5737

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,485,332	$2,716,460	$2,947,531	$3,051,909	$2,938,340	$2,895,568
Associated Payroll Costs	$1,182,696	$1,258,686	$1,365,757	$1,429,587	$1,621,340	$1,636,142
Purchased Services	$ 29,045	$ 6,920	$ 5,719	$ 6,635	$ 12,972	$ 11,712
Supplies and Materials	$ 41,667	$ 122,701	$ 83,048	$ 52,025	$ 18,628	$ 21,688
Capital		$ 108				
Other Objects		$ 85			$ 396	$ 348
Total	**$ 3,738,740**	**$ 4,104,961**	**$ 4,402,055**	**$ 4,540,156**	**$ 4,591,676**	**$ 4,565,458**
Dollars per Student	**$ 10,964 :1**	**$ 11,796 :1**	**$ 13,101 :1**	**$ 14,232 :1**	**$ 16,697 :1**	**$ 17,163 :1**

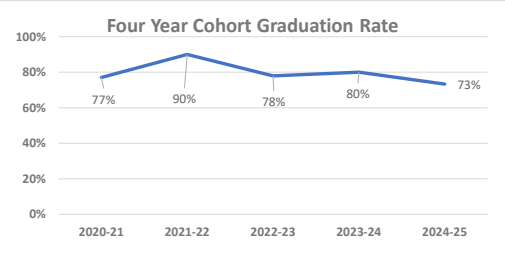
Note: Foundation funding ended after the 2023-24 school year.

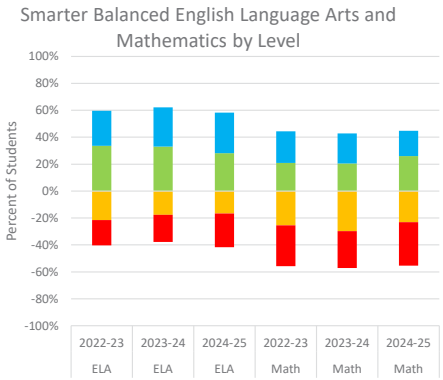
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	20%	24%	29%	33%	44%
*Students with Disabilities	27%	25%	27%	31%	30%
*English Language Learners					1%
*Free-Direct Certification	9%	11%	21%	18%	21%
Black	1%	3%	3%	1%	2%
Latino	11%	11%	11%	12%	11%
Native American	0%	0%	0%		
Pacific Islander					
Multi-Race - Other Ancestry	8%	7%	7%	7%	9%
Multi-Race - Asian/White	7%	6%	6%	5%	4%
Asian	2%	2%	2%	1%	1%
White	71%	71%	71%	74%	74%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	26%	29%	30%
ELA	Level 3	34%	33%	28%
ELA	Level 2	22%	18%	17%
ELA	Level 1	19%	20%	25%
	ELA Participation	90%	90%	92%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	23%	22%	19%
Math	Level 3	21%	21%	26%
Math	Level 2	25%	30%	23%
Math	Level 1	30%	27%	32%
	Math Participation	86%	88%	91%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Mt Tabor

5800 SE Ash St
503-916-5646

6-8 Constructed 1952

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	327	302	259	229	208	199	193	201
Japanese Immersion	249	240	244	238	222	216	213	210
Spanish Immersion	69	65						
Total	**645**	**607**	**503**	**467**	**430**	**415**	**406**	**411**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	28.65	27.85	24.75	22.35	19.25	18.49
		Counseling Services	3.00	3.00	2.00	1.60	1.60	1.80
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention	0.50	1.00	1.50	1.40	0.50	0.40
		Other	1.50	1.50	2.00			0.36
	Classified /Non-Rep	Clerical	2.00	3.00	2.80	2.60	2.60	1.60
		Ed. Assistant/ Paraeducator						0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**38.65**	**39.35**	**36.05**	**30.45**	**26.45**	**25.55**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.50	4.50	3.80	2.50	2.00	2.00
		ESL	0.50	0.50	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	3.75	3.75	3.75	2.81	3.75	3.75
		ESL						
		Nutrition Services	1.50	1.50	1.50	1.63	1.63	1.63
		Custodial	4.00	4.00	4.00	4.00	3.00	3.00
		Other			1.00			
CASR Total			**13.25**	**14.25**	**14.30**	**11.19**	**10.63**	**10.63**
Grand Total			**51.90**	**53.60**	**50.35**	**41.64**	**37.08**	**36.18**
Overall Students per FTE			12.4:1	11.3:1	10.0:1	11.2:1	11.6:1	11.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	32.00	28.95	26.95	23.95	20.85	19.85
		Gen Fund Equity						
		Gen Fund K-5 Arts						
		Foundation						
		Title I						
		SIA/M98	1.50	4.70	2.40	1.40	0.50	1.20
		Other	0.65	0.21	1.40	0.50	0.50	0.50
	Classified/ Non-Rep	Gen Fund	2.50	3.50	2.30	1.60	1.60	2.00
		Gen Fund Equity						
		Foundation						
		Title I						
		SIA/M98			1.00	1.00	1.00	
		Other						
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**38.65**	**39.35**	**36.05**	**30.45**	**26.45**	**25.55**

School and CASR	**Licensed**	38.15	38.85	34.80	28.60	24.10	23.80
	Classified/ Non-Rep	11.75	12.75	13.55	11.04	10.98	10.38
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Mt Tabor

5800 SE Ash St
503-916-5646

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,337,835	$3,429,464	$3,432,761	$3,147,902	$2,809,685	$2,754,888
Associated Payroll Costs	$1,628,823	$1,604,774	$1,639,577	$1,437,926	$1,495,598	$1,530,654
Purchased Services	$ 13,433	$ 12,354	$ 14,340	$ 12,718	$ 16,488	$ 20,059
Supplies and Materials	$ 51,295	$ 65,991	$ 88,760	$ 93,402	$ 16,440	$ 26,320
Capital	$ 122	$ 195	$ 175	$ 629		
Other Objects	$ 150			$ 336	$ 492	$ 492
Total	**$ 5,031,658**	**$ 5,112,778**	**$ 5,175,613**	**$ 4,692,912**	**$ 4,338,703**	**$ 4,332,413**
Dollars per Student	**$ 7,801 :1**	**$ 8,423 :1**	**$ 10,289 :1**	**$ 10,049 :1**	**$ 10,090 :1**	**$ 10,440 :1**

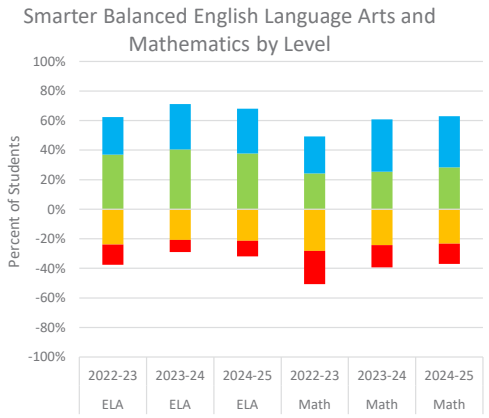
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	15%	17%	19%	22%	23%
*Students with Disabilities	15%	15%	14%	14%	12%
*English Language Learners	4%	3%	1%	1%	2%
*Free-Direct Certification	9%	8%	14%	15%	16%
Black	1%	2%	2%	2%	2%
Latino	12%	11%	8%	9%	11%
Native American					
Pacific Islander	1%	1%	0%	0%	
Multi-Race - Other Ancestry	5%	6%	5%	3%	3%
Multi-Race - Asian/White	14%	16%	22%	23%	23%
Asian	5%	4%	4%	5%	5%
White	63%	61%	59%	59%	56%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	25%	31%	30%
ELA	Level 3	37%	41%	38%
ELA	Level 2	24%	21%	21%
ELA	Level 1	14%	8%	11%
	ELA Participation	97%	97%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	25%	35%	35%
Math	Level 3	24%	25%	28%
Math	Level 2	28%	24%	23%
Math	Level 1	22%	15%	14%
	Math Participation	97%	97%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Ockley Green

6031 N Montana Ave
503-916-5660

The Oregon Department of Education has identified this school as a Comprehensive Supports for Improvement (CSI) school. Title I School for 2026-27

6-8 Constructed 1925

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	381	384	350	341	397	372	378	352
Spanish Immersion	104	99	78	69	63	64	65	55
Total	**485**	**483**	**428**	**410**	**460**	**436**	**443**	**407**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	25.25	24.90	22.50	21.90	21.40	19.90
		Counseling Services	2.00	2.80	2.00	1.60	1.80	1.80
		Library/Media Services	1.00	1.00	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention		1.00	1.00	3.00	2.60	1.00
		Other	1.50	2.00	2.00	2.00	2.50	2.80
	Classified /Non-Rep	Clerical	3.25	4.50	4.00	4.50	3.00	2.60
		Ed. Assistant/ Paraeducator		0.50	0.50			0.40
		Library/Media Services	0.25	1.00				
		Other						
	Admin.		2.50	3.00	3.00	3.00	2.00	2.00
School Total			**35.75**	**40.70**	**35.50**	**36.50**	**33.80**	**31.00**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.50	3.80	3.80	3.00	3.00	2.00
		ESL	0.50	1.00	1.00	1.00	1.00	1.00
		Other	1.00	1.50	1.00	1.00		
	Classified /Non-Rep	Special Education	5.63	3.55	2.81	2.81	1.88	0.94
		ESL						
		Nutrition Services	1.38	2.69	2.88	1.38	1.38	1.38
		Custodial	4.00	3.00	3.00	3.00	3.00	3.00
		Other	1.00	1.00	1.00	1.00	1.00	1.00
CASR Total			**17.00**	**16.54**	**15.49**	**13.19**	**11.25**	**9.31**
Grand Total			**52.75**	**57.24**	**50.99**	**49.69**	**45.05**	**40.31**
Overall Students per FTE			9.2:1	8.4:1	8.4:1	8.3:1	10.2:1	10.8:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	22.88	19.70	22.15	23.00	23.80	21.90
		Gen Fund Equity	2.38	3.50	1.50		0.60	1.00
		Gen Fund K-5 Arts						
		Foundation						
		Title I				1.00	0.90	0.20
		SIA/M98	4.00	6.50	4.35	5.00	3.40	2.60
		Other	0.50	2.00			0.10	0.30
	Classified/ Non-Rep	Gen Fund	2.75	6.00	1.50	1.95	2.10	1.90
		Gen Fund Equity			0.80	1.00	0.40	
		Foundation	0.50					
		Title I				0.85	0.30	1.10
		SIA/M98			1.00			
		Other	0.25		1.20	0.70	0.20	
	Admin.	Gen Fund	2.00	2.00	2.50	3.00	2.00	2.00
		Gen Fund Equity			0.50			
		Title I						
		Other	0.50	1.00				
School Total			**35.75**	**40.70**	**35.50**	**36.50**	**33.80**	**31.00**

School and CASR	**Licensed**	34.75	38.00	33.80	34.00	32.80	29.00
	Classified/ Non-Rep	15.50	16.24	14.19	12.69	10.25	9.31
	Admin.	2.50	3.00	3.00	3.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Ockley Green

6031 N Montana Ave
503-916-5660

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,716,440	$2,980,525	$2,921,273	$3,298,017	$3,118,049	$3,059,919
Associated Payroll Costs	$1,287,610	$1,419,106	$1,470,192	$1,575,819	$1,785,760	$1,795,916
Purchased Services	$ 31,008	$ 14,010	$ 7,553	$ 25,353	$ 17,640	$ 17,028
Supplies and Materials	$ 70,166	$ 46,207	$ 28,652	$ 68,311	$ 93,106	$ 61,162
Capital						
Other Objects			$ 195	$ 4,590	$ 528	$ 516
Total	**$ 4,105,224**	**$ 4,459,848**	**$ 4,427,865**	**$ 4,972,090**	**$ 5,015,083**	**$ 4,934,541**
Dollars per Student	**$ 8,464 :1**	**$ 9,234 :1**	**$ 10,345 :1**	**$ 12,127 :1**	**$ 10,902 :1**	**$ 11,318 :1**

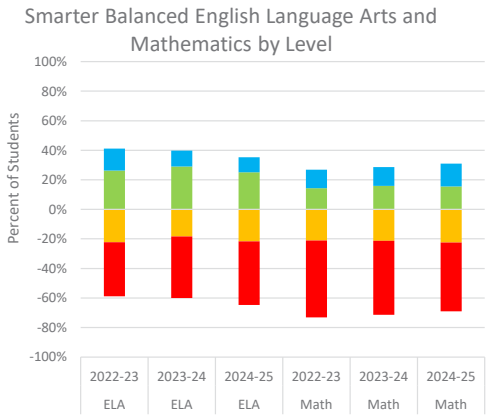
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	32%	35%	39%	39%	46%
*Students with Disabilities	15%	12%	15%	15%	15%
*English Language Learners	7%	7%	7%	7%	7%
*Free-Direct Certification	30%	29%	39%	34%	35%
Black	21%	20%	17%	15%	17%
Latino	24%	22%	21%	19%	18%
Native American	0%	0%	0%	0%	1%
Pacific Islander	2%	1%	1%	1%	1%
Multi-Race - Other Ancestry	9%	8%	10%	11%	11%
Multi-Race - Asian/White	4%	4%	4%	4%	3%
Asian	2%	1%	2%	1%	2%
White	38%	42%	45%	49%	47%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	15%	11%	10%
ELA	Level 3	26%	29%	25%
ELA	Level 2	22%	18%	22%
ELA	Level 1	37%	42%	43%
	ELA Participation	94%	96%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	13%	13%	16%
Math	Level 3	14%	16%	15%
Math	Level 2	21%	21%	23%
Math	Level 1	52%	50%	47%
	Math Participation	92%	95%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Odyssey

1849 SW 58th Ave.
503-916-5560

K-8 *East Sylvan constructed 1933*

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	219	225	227	211	217	222	221	224
Total	**219**	**225**	**227**	**211**	**217**	**222**	**221**	**224**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	10.90	11.50	11.50	11.60	11.66	11.20
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	1.00	0.40	0.40	0.40
		Instructional Spec/ Coach/ Intervention			2.00	1.10	1.00	1.00
		Other	0.50	0.50	0.50			
	Classified /Non-Rep	Clerical	1.00	1.00	2.00	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	0.50	0.50	0.50			0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**15.90**	**16.50**	**20.00**	**16.60**	**16.56**	**16.50**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	0.50	0.90	1.40	1.00	1.00	1.00
		ESL	0.25	0.25	0.25			
		Other						
	Classified /Non-Rep	Special Education	0.94	0.94	1.88	0.94	0.94	0.94
		ESL						
		Nutrition Services	0.69	0.75	0.75	0.75	0.75	0.75
		Custodial	2.00	2.00	2.00	2.00	1.00	1.00
		Other		0.88	0.88	0.88	0.88	
CASR Total			**4.38**	**5.71**	**7.15**	**5.56**	**4.56**	**3.69**
Grand Total			**20.28**	**22.21**	**27.15**	**22.16**	**21.12**	**20.19**
Overall Students per FTE			10.8:1	10.1:1	8.4:1	9.5:1	10.3:1	11.0:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	11.80	12.00	13.50	12.70	12.66	12.20
		Gen Fund Equity						
		Gen Fund K-5 Arts	0.60	0.50	0.50	0.40	0.40	0.40
		Foundation						
		Title I						
		SIA/M98	0.50	1.00	1.00	1.00	1.00	1.00
		Other			1.00			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	3.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation						
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**15.90**	**16.50**	**20.00**	**16.60**	**16.56**	**16.50**

School and CASR	**Licensed**	13.65	14.65	17.65	15.10	15.06	14.60
	Classified/ Non-Rep	5.63	6.56	8.50	6.06	5.06	4.59
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Odyssey

1849 SW 58th Ave.
503-916-5560

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,246,898	$1,404,387	$1,655,427	$1,527,989	$1,571,316	$1,561,420
Associated Payroll Costs	$ 641,352	$ 696,183	$ 848,153	$ 762,169	$ 874,451	$ 893,605
Purchased Services	$ 2,618	$ 11,275	$ 17,883	$ 3,500	$ 10,272	$ 10,332
Supplies and Materials	$ 20,763	$ 34,154	$ 41,347	$ 33,678	$ 10,236	$ 20,296
Capital	$ 1,550			$ 211		
Other Objects					$ 312	$ 312
Total	**$ 1,913,181**	**$ 2,145,999**	**$ 2,562,809**	**$ 2,327,547**	**$ 2,466,586**	**$ 2,485,965**
Dollars per Student	**$ 8,736 :1**	**$ 9,538 :1**	**$ 11,290 :1**	**$ 11,031 :1**	**$ 11,367 :1**	**$ 11,198 :1**

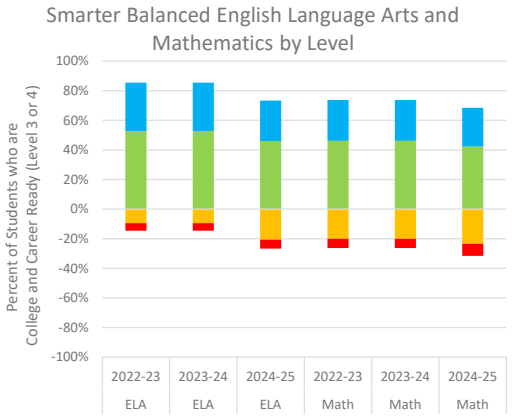
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	14%	15%	20%	23%	25%
*Students with Disabilities	10%	12%	15%	19%	17%
*English Language Learners					1%
*Free-Direct Certification	1%	2%	4%	4%	7%
Black	1%	1%	1%	2%	1%
Latino	5%	5%	4%	4%	6%
Native American					1%
Pacific Islander					
Multi-Race - Other Ancestry	4%	3%	4%	6%	5%
Multi-Race - Asian/White	12%	12%	12%	10%	10%
Asian	3%	3%	3%	3%	4%
White	76%	76%	76%	75%	74%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	53%	53%	46%
ELA	Level 3	32%	32%	27%
ELA	Level 2	10%	10%	21%
ELA	Level 1	5%	5%	6%
ELA Participation				

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	46%	46%	42%
Math	Level 3	28%	28%	26%
Math	Level 2	20%	20%	23%
Math	Level 1	6%	6%	8%
Math Participation				



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Peninsula

8125 N Emerald St
503-916-6275

Title I School for 2026-27

K-5 Constructed 1952

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	201	225	234	235	239	255	252	253
Total	**201**	**225**	**234**	**235**	**239**	**255**	**252**	**253**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	16.00	14.50	12.00	12.60	12.70	11.80
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.40	0.60	0.40
		Instructional Spec/ Coach/ Intervention	1.00	1.00	1.50	1.50	1.50	1.50
		Other	0.50	1.25	1.50	0.50	0.50	0.60
	Classified /Non-Rep	Clerical	1.50	1.75	1.75	1.75	1.75	1.75
		Ed. Assistant/ Paraeducator	1.00	2.25	2.88	4.13	1.75	0.40
		Library/Media Services						
		Other		0.94	0.94			0.94
	Admin.		1.00	1.00	1.00	2.00	2.00	1.00
School Total			**23.00**	**24.69**	**23.57**	**23.88**	**21.80**	**19.39**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.50	4.50	4.50	4.00	4.00	4.00
		ESL	0.50	0.25	0.50	0.50	0.50	0.50
		Other						
	Classified /Non-Rep	Special Education	8.44	7.50	8.44	11.26	11.26	11.26
		ESL						
		Nutrition Services	1.56	1.38	1.31	1.31	1.31	1.31
		Custodial	3.00	4.00	3.00	2.00	2.00	2.00
		Other					0.88	
CASR Total			**17.01**	**17.63**	**17.76**	**19.07**	**19.94**	**19.07**
Grand Total			**40.01**	**42.32**	**41.32**	**42.95**	**41.75**	**38.46**
Overall Students per FTE			5.0:1	5.3:1	5.7:1	5.5:1	5.7:1	6.6:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	15.75	14.45	13.25	13.20	13.40	13.00
		Gen Fund Equity	1.50	0.80	1.25			
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	0.90	0.80
		Foundation	0.05					
		Title I						
		SIA/M98	1.70	2.00	2.00	2.00	2.00	1.50
		Other		1.00				
	Classified/ Non-Rep	Gen Fund	1.50	1.50	2.38	1.50	1.50	1.90
		Gen Fund Equity		1.40	0.50	0.94		1.00
		Foundation						
		Title I				1.51	0.25	0.19
		SIA/M98			1.00	1.75	1.75	
		Other	1.00	2.04	1.69	0.18		
	Admin.	Gen Fund	1.00	1.00	1.00	2.00	1.50	1.00
		Gen Fund Equity					0.35	
		Title I					0.15	
		Other						
School Total			**23.00**	**24.69**	**23.57**	**23.88**	**21.80**	**19.39**

School and CASR	**Licensed**	23.50	23.50	22.00	20.50	20.80	19.80
	Classified/ Non-Rep	15.51	17.82	18.32	20.45	18.95	17.66
	Admin.	1.00	1.00	1.00	2.00	2.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Peninsula

8125 N Emerald St
503-916-6275

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,776,582	$1,852,211	$1,907,402	$2,062,404	$2,063,335	$1,898,285
Associated Payroll Costs	$ 876,145	$ 984,150	$1,033,140	$1,080,149	$1,152,961	$1,103,779
Purchased Services	$ 5,112	$ 7,410	$ 9,265	$ 44,874	$ 10,932	$ 11,340
Supplies and Materials	$ 28,684	$ 30,281	$ 28,886	$ 23,099	$ 64,902	$ 11,316
Capital				$ 2,992		
Other Objects					$ 324	$ 35,746
Total	**$ 2,686,523**	**$ 2,874,052**	**$ 2,978,693**	**$ 3,213,517**	**$ 3,292,453**	**$ 3,060,466**
Dollars per Student	**$ 13,366 :1**	**$ 12,774 :1**	**$ 12,729 :1**	**$ 13,675 :1**	**$ 13,776 :1**	**$ 12,002 :1**

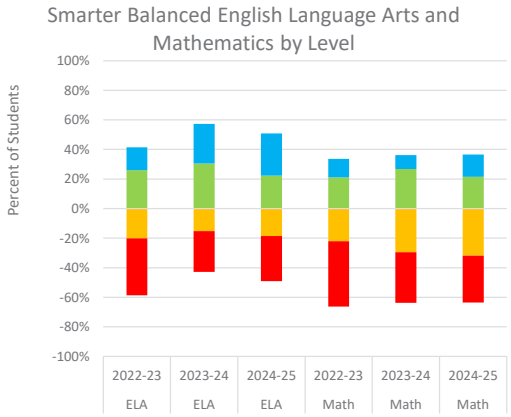
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	35%	41%	46%	47%	52%
*Students with Disabilities	26%	27%	29%	23%	30%
*English Language Learners	5%	7%	5%	5%	5%
*Free-Direct Certification	26%	31%	35%	35%	38%
Black	11%	11%	12%	14%	13%
Latino	16%	17%	19%	20%	20%
Native American	1%	1%	1%	2%	2%
Pacific Islander	1%				0%
Multi-Race - Other Ancestry	10%	13%	12%	11%	13%
Multi-Race - Asian/White	4%	4%	3%	3%	4%
Asian	4%	3%	2%	2%	3%
White	54%	52%	51%	49%	45%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	15%	27%	29%
ELA	Level 3	26%	31%	22%
ELA	Level 2	20%	15%	19%
ELA	Level 1	39%	28%	31%
	ELA Participation	95%	92%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	13%	10%	15%
Math	Level 3	21%	27%	22%
Math	Level 2	22%	30%	32%
Math	Level 1	44%	34%	32%
	Math Participation	95%	92%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Richmond

2276 SE 41st Ave
503-916-6220

K-5 Constructed 1908

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Japanese Immersion	551	539	537	530	512	505	504	502
Total	**551**	**539**	**537**	**530**	**512**	**505**	**504**	**502**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	25.25	24.75	22.40	22.70	22.80	21.40
		Counseling Services	1.50	2.00	2.00	1.60	1.60	1.60
		Library/Media Services	0.50	0.50	0.50	0.80	0.80	0.80
		Instructional Spec/ Coach/ Intervention			1.50	1.00	1.00	0.50
		Other	0.50					
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	1.50	1.50
		Ed. Assistant/ Paraeducator	1.00	0.50	0.44	0.38	1.00	0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		2.00	2.00	1.00	1.00	1.00	1.00
School Total			**33.25**	**32.25**	**30.34**	**29.48**	**29.70**	**27.20**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.80	2.00	1.00	1.00	1.00
		ESL	0.50	1.00	1.50	0.50	1.00	1.00
		Other						
	Classified /Non-Rep	Special Education						
		ESL			0.44			
		Nutrition Services	1.56	1.25	1.25	1.75	1.75	1.75
		Custodial	3.00	5.00	4.00	4.00	3.00	3.00
		Other						
CASR Total			**6.06**	**9.05**	**9.19**	**7.25**	**6.75**	**6.75**
Grand Total			**39.31**	**41.30**	**39.53**	**36.73**	**36.45**	**33.95**
Overall Students per FTE			14.0:1	13.1:1	13.6:1	14.4:1	14.0:1	14.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	24.25	23.25	24.40	23.80	23.80	21.60
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.50	1.50	1.00	1.20	1.40	1.20
		Foundation	1.00	1.00		0.10		
		Title I						
		SIA/M98	0.50	1.50	0.50	1.00	1.00	1.50
		Other	0.50		0.50			
	Classified/ Non-Rep	Gen Fund	3.00	2.30	2.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation	0.50	0.70	0.94	0.88		
		Title I						
		SIA/M98					1.00	
		Other						
	Admin.	Gen Fund	2.00	2.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**33.25**	**32.25**	**30.34**	**29.48**	**29.70**	**27.20**

School and CASR	**Licensed**	29.25	30.05	29.90	27.60	28.20	26.30
	Classified/ Non-Rep	8.06	9.25	8.63	8.13	7.25	6.65
	Admin.	2.00	2.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Richmond

2276 SE 41st Ave
503-916-6220

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,555,685	$2,765,063	$2,776,250	$2,850,435	$2,916,021	$2,764,148
Associated Payroll Costs	$1,257,524	$1,325,158	$1,346,359	$1,378,186	$1,601,596	$1,578,171
Purchased Services	$ 7,152	$ 8,894	$ 11,896	$ 21,850	$ 20,244	$ 21,253
Supplies and Materials	$ 53,887	$ 44,597	$ 45,966	$ 66,702	$ 53,607	$ 57,336
Capital		$ 239				
Other Objects	$ 239		$ 1,000		$ 612	$ 300
Total	**$ 3,874,488**	**$ 4,143,950**	**$ 4,181,472**	**$ 4,317,173**	**$ 4,592,080**	**$ 4,421,208**
Dollars per Student	**$ 7,032 :1**	**$ 7,688 :1**	**$ 7,787 :1**	**$ 8,146 :1**	**$ 8,969 :1**	**$ 8,755 :1**

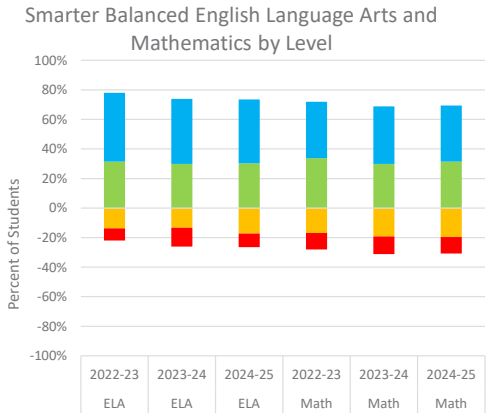
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	16%	18%	18%	20%	22%
*Students with Disabilities	7%	7%	10%	10%	10%
*English Language Learners	9%	10%	7%	8%	7%
*Free-Direct Certification	3%	3%	10%	10%	6%
Black	1%	1%	1%	1%	1%
Latino	5%	5%	6%	6%	7%
Native American					
Pacific Islander					
Multi-Race - Other Ancestry	4%	4%	4%	4%	3%
Multi-Race - Asian/White	35%	36%	36%	39%	38%
Asian	10%	9%	10%	9%	10%
White	45%	44%	44%	41%	42%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	47%	44%	43%
ELA	Level 3	32%	30%	30%
ELA	Level 2	14%	13%	17%
ELA	Level 1	8%	13%	9%
	ELA Participation	99%	97%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	38%	39%	38%
Math	Level 3	34%	30%	32%
Math	Level 2	17%	19%	20%
Math	Level 1	11%	12%	11%
	Math Participation	99%	97%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Rieke

1405 SW Vermont St
503-916-5768

K-5 Constructed 1959

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	313	300	288	278	264	255	252	272
Total	**313**	**300**	**288**	**278**	**264**	**255**	**252**	**272**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	16.00	13.80	13.80	13.60	13.60	12.60
		Counseling Services	1.50	1.50	1.50	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention		0.30	1.50	1.40	1.00	1.00
		Other						
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	0.60	0.95				0.40
		Library/Media Services	0.50	0.50	0.50			
		Other	0.40	0.40	0.30	0.60		
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.00**	**20.45**	**20.60**	**19.70**	**18.70**	**17.90**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.40	1.40	1.00	1.00	1.00
		ESL	0.25	0.25	0.25	0.25	0.25	
		Other						
	Classified /Non-Rep	Special Education						
		ESL						
		Nutrition Services	0.81	0.81	0.94	1.00	1.00	1.00
		Custodial	2.00	3.00	3.00	2.00	2.00	2.00
		Other						
CASR Total			**4.06**	**5.46**	**5.59**	**4.25**	**4.25**	**4.00**
Grand Total			**26.06**	**25.92**	**26.19**	**23.95**	**22.95**	**21.90**
Overall Students per FTE			12.0:1	11.6:1	11.0:1	11.6:1	11.5:1	11.6:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	16.50	14.30	15.30	14.40	14.40	13.20
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	0.50	0.50	0.80	0.80	0.80
		Foundation		0.30	0.50	0.40		
		Title I						
		SIA/M98	0.50	0.50	0.50	1.00	1.00	1.00
		Other		0.50	0.50			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	1.50	1.50	1.90
		Gen Fund Equity						
		Foundation	1.00	1.35	0.10	0.60		
		Title I						
		SIA/M98						
		Other			0.20			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.00**	**20.45**	**20.60**	**19.70**	**18.70**	**17.90**

School and CASR	**Licensed**	19.25	17.75	18.95	17.85	17.45	16.00
	Classified/ Non-Rep	5.81	7.17	6.24	5.10	4.50	4.90
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Rieke

1405 SW Vermont St
503-916-5768

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,781,677	$1,736,026	$1,937,984	$2,002,439	$1,928,470	$1,892,029
Associated Payroll Costs	$ 885,040	$ 866,395	$ 987,973	$ 983,390	$1,046,061	$1,047,216
Purchased Services	$ 4,714	$ 6,537	$ 6,338	$ 8,722	$ 11,712	$ 11,424
Supplies and Materials	$ 21,656	$ 20,814	$ 22,443	$ 19,956	$ 11,688	$ 11,388
Capital						
Other Objects			$ 4,938		$ 348	$ 348
Total	**$ 2,693,087**	**$ 2,629,772**	**$ 2,959,676**	**$ 3,014,507**	**$ 2,998,279**	**$ 2,962,405**
Dollars per Student	**$ 8,604 :1**	**$ 8,766 :1**	**$ 10,277 :1**	**$ 10,844 :1**	**$ 11,357 :1**	**$ 11,617 :1**

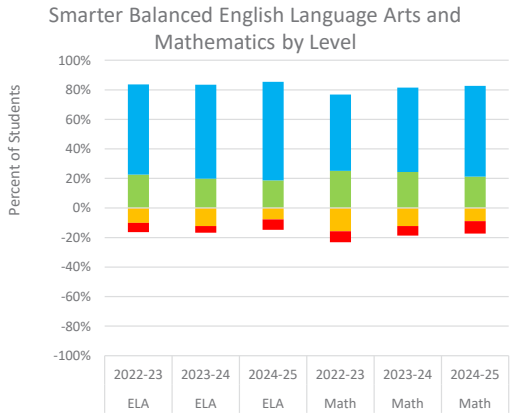
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	17%	19%	21%	26%	26%
*Students with Disabilities	11%	9%	13%	13%	14%
*English Language Learners	1%	1%	1%	3%	2%
*Free-Direct Certification	7%	10%	16%	17%	15%
Black	4%	4%	5%	4%	3%
Latino	8%	10%	10%	9%	9%
Native American	0%	0%			
Pacific Islander				0%	1%
Multi-Race - Other Ancestry	4%	3%	4%	5%	6%
Multi-Race - Asian/White	5%	5%	6%	6%	6%
Asian	1%	1%	1%	3%	3%
White	78%	78%	74%	73%	72%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	61%	64%	67%
ELA	Level 3	23%	20%	19%
ELA	Level 2	10%	12%	8%
ELA	Level 1	6%	5%	7%
	ELA Participation	99%	99%	100%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	52%	57%	62%
Math	Level 3	25%	24%	21%
Math	Level 2	16%	12%	9%
Math	Level 1	8%	6%	8%
	Math Participation	99%	99%	100%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Rigler

5401 NE Prescott St
503-916-6451

Title I School for 2026-27

K-5 Constructed 1931

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Spanish Immersion	237	223	255	301	289	302	307	330
Total	**237**	**223**	**255**	**301**	**289**	**302**	**307**	**330**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.50	14.50	15.50	16.50	16.40	15.10
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	0.75	0.75	0.80	0.60	0.60
		Instructional Spec/ Coach/ Intervention	3.00	3.00	2.60	3.00	2.00	1.50
		Other	0.50	0.50	0.50	1.00	2.00	1.50
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	2.00	1.80
		Ed. Assistant/ Paraeducator	2.63	2.63	2.63	3.50	2.39	2.59
		Library/Media Services						
		Other						
	Admin.		2.00	2.00	2.00	1.00	1.00	1.00
School Total			**26.63**	**26.38**	**26.98**	**28.80**	**27.39**	**25.09**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.80	1.60	1.00	1.00	1.00
		ESL	3.00	2.50	2.50	3.70	4.00	3.00
		Other	1.00	1.00	1.00			
	Classified /Non-Rep	Special Education	0.94	0.94	0.94			
		ESL		0.88	0.88	0.88	1.32	0.44
		Nutrition Services	1.88	2.13	2.13	1.63	1.94	1.94
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other	0.50	0.50				
CASR Total			**11.31**	**12.74**	**12.04**	**10.20**	**11.25**	**9.38**
Grand Total			**37.94**	**39.12**	**39.02**	**39.01**	**38.64**	**34.47**
Overall Students per FTE			6.2:1	5.7:1	6.5:1	7.7:1	7.5:1	8.8:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	14.90	13.55	14.55	16.40	16.60	14.40
		Gen Fund Equity	1.65	1.30	0.80	1.00	1.00	1.00
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	1.20	0.80
		Foundation						
		Title I	0.55	0.66	0.65		0.20	0.70
		SIA/M98	2.40	3.50	3.00	3.50	2.50	2.55
		Other		0.24	0.85	0.60	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.50	1.50	1.50	1.90
		Gen Fund Equity	0.30					
		Foundation						
		Title I	1.63	1.25	1.31	1.38	1.14	0.74
		SIA/M98			1.50	2.63	1.75	1.75
		Other	1.20	1.88	0.32			
	Admin.	Gen Fund	1.50	1.50	1.50	1.00	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50			
		Title I						
		Other						
School Total			**26.63**	**26.38**	**26.98**	**28.80**	**27.39**	**25.09**

School and CASR	**Licensed**	25.00	25.05	25.45	27.00	27.00	23.70
	Classified/ Non-Rep	10.94	12.07	11.57	11.01	10.64	9.77
	Admin.	2.00	2.00	2.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Rigler

5401 NE Prescott St
503-916-6451

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,898,070	$2,121,134	$2,331,041	$2,555,381	$2,485,479	$2,215,458
Associated Payroll Costs	$ 912,373	$1,008,252	$1,106,406	$1,121,254	$1,415,018	$1,326,271
Purchased Services	$ 8,475	$ 15,645	$ 6,333	$ 17,974	$ 12,900	$ 13,140
Supplies and Materials	$ 45,207	$ 30,359	$ 24,312	$ 49,861	$ 69,489	$ 14,347
Capital	$ 463	$ 97	$ 20,562	$ 1,495		
Other Objects	$ 499				$ 384	$ 396
Total	**$ 2,865,086**	**$ 3,175,487**	**$ 3,488,654**	**$ 3,745,965**	**$ 3,983,270**	**$ 3,569,612**
Dollars per Student	**$ 12,089 :1**	**$ 14,240 :1**	**$ 13,681 :1**	**$ 12,445 :1**	**$ 13,783 :1**	**$ 11,820 :1**

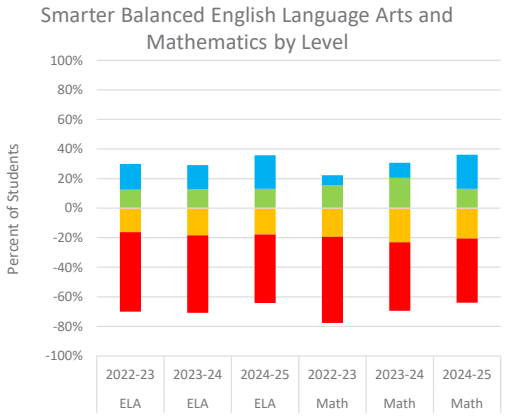
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	48%	48%	53%	56%	69%
*Students with Disabilities	11%	12%	16%	13%	14%
*English Language Learners	46%	42%	40%	48%	49%
*Free-Direct Certification	40%	37%	49%	52%	53%
Black	4%	2%	3%	4%	3%
Latino	68%	62%	62%	64%	62%
Native American					
Pacific Islander	1%	0%			
Multi-Race - Other Ancestry	3%	3%	2%	1%	2%
Multi-Race - Asian/White	0%	1%	0%	0%	1%
Asian	1%	1%	1%	1%	1%
White	23%	31%	31%	30%	31%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	17%	17%	23%
ELA	Level 3	13%	13%	13%
ELA	Level 2	16%	18%	18%
ELA	Level 1	54%	52%	46%
	ELA Participation	99%	94%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	7%	10%	23%
Math	Level 3	16%	20%	13%
Math	Level 2	19%	23%	21%
Math	Level 1	58%	46%	43%
	Math Participation	98%	99%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Roosevelt

6941 N Central St
503-916-5260

The Oregon Department of Education has identified this school as a Comprehensive Supports for Improvement (CSI) school. Title I School for 2026-27

9-12 Reconstructed 2016

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	1137	1208	1130	1110	1082	1001	970	919
Spanish Immersion	200	226	256	295	299	289	289	280
PISA	39	54	71	47	38	49	53	53
Total	**1376**	**1488**	**1457**	**1452**	**1419**	**1339**	**1312**	**1252**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	69.88	74.23	72.17	72.66	73.57	63.18
		Counseling Services	5.00	5.00	5.00	5.50	5.09	4.50
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	3.68	3.00	3.00	3.00	2.35	3.17
		Other	6.50	6.00	6.00	4.00	4.00	4.00
	Classified /Non-Rep	Clerical	8.00	10.00	10.50	10.50	10.50	10.50
		Ed. Assistant/ Paraeducator						
		Library/Media Services		0.50	0.50			
		Other	4.00	6.00	6.00	4.00	4.00	3.00
	Admin.		4.00	4.00	3.00	3.50	5.00	5.00
School Total			**102.06**	**109.73**	**107.17**	**104.17**	**105.50**	**94.35**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	12.00	13.50	13.50	11.50	11.00	12.00
		ESL	6.94	9.77	9.00	9.50	7.16	6.65
		Other	2.00	1.00				
	Classified /Non-Rep	Special Education	15.01	14.07	15.95	15.01	14.07	15.01
		ESL	1.38	2.25	2.25	1.75	1.75	0.88
		Nutrition Services	2.63	3.00	3.31	3.69	3.31	3.31
		Custodial	8.00	9.45	11.18	10.73	10.73	10.75
		Other	3.00	3.00	4.00	4.00	4.00	4.00
CASR Total			**50.95**	**56.04**	**59.19**	**56.17**	**52.02**	**52.60**
Grand Total			**153.01**	**165.77**	**166.35**	**160.34**	**157.52**	**146.95**
Overall Students per FTE			9.0:1	9.0:1	8.8:1	9.1:1	9.0:1	9.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	68.46	70.35	71.42	69.93	72.83	63.33
		Gen Fund Equity	11.00	11.31	9.24	8.80	6.26	4.85
		Gen Fund K-5 Arts						
		Foundation						
		Title I				2.43	1.86	
		SIA/M98	5.50	6.50	6.50	5.00	5.00	7.67
		Other	1.10	1.07			0.05	
	Classified/ Non-Rep	Gen Fund	8.00	10.50	9.67	6.50	5.50	5.67
		Gen Fund Equity	2.00	3.00	4.33	1.50	2.00	3.50
		Foundation						
		Title I				3.50	2.50	2.33
		SIA/M98	2.00	3.00	3.00	3.00	4.00	2.00
		Other					0.50	
	Admin.	Gen Fund	3.29	3.00	3.00	3.00	4.00	4.00
		Gen Fund Equity	0.72			0.50	1.00	1.00
		Title I						
		Other		1.00				
School Total			**102.06**	**109.73**	**107.17**	**104.17**	**105.50**	**94.35**

School and CASR	**Licensed**	107.00	113.50	109.67	107.17	104.16	94.50
	Classified/ Non-Rep	42.01	48.27	53.69	49.67	48.36	47.45
	Admin.	4.00	4.00	3.00	3.50	5.00	5.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Roosevelt

6941 N Central St
503-916-5260

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$8,091,610	$9,735,101	$10,092,186	$10,618,925	$10,928,065	$10,143,972
Associated Payroll Costs	$3,980,363	$4,670,139	$4,908,462	$5,167,409	$6,060,379	$5,825,447
Purchased Services	$ 40,161	$ 106,042	$ 97,014	$ 145,272	$ 77,787	$ 60,708
Supplies and Materials	$ 268,073	$ 327,310	$ 399,166	$ 559,808	$ 160,244	$ 182,950
Capital				$ 5,179		
Other Objects	$ 2,200	$ 3,542	$ 3,267	$ 2,191	$ 2,016	$ 1,824
Total	**$12,382,407**	**$14,842,133**	**$15,500,094**	**$16,498,784**	**$17,228,492**	**$16,214,901**
Dollars per Student	**$ 8,999 :1**	**$ 9,975 :1**	**$10,638 :1**	**$11,363 :1**	**$12,141 :1**	**$12,110 :1**

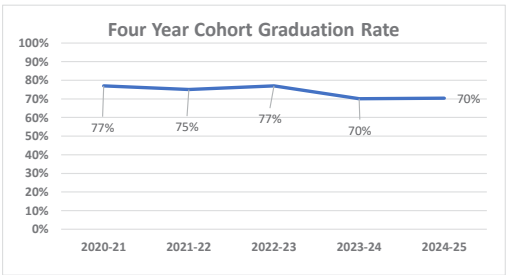
Note: Foundation funding ended after the 2023-24 school year.

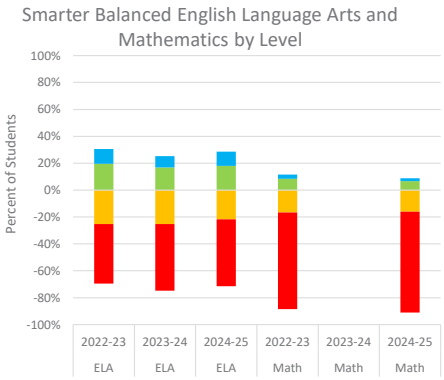
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	2%	14%	26%	38%	55%
*Students with Disabilities	17%	16%	16%	15%	16%
*English Language Learners	18%	17%	19%	17%	17%
*Free-Direct Certification	34%	31%	47%	47%	44%
Black	14%	12%	13%	13%	12%
Latino	38%	38%	40%	37%	36%
Native American	1%	1%	1%	1%	1%
Pacific Islander	2%	2%	2%	2%	1%
Multi-Race - Other Ancestry	8%	9%	9%	9%	8%
Multi-Race - Asian/White	1%	2%	2%	2%	3%
Asian	4%	3%	2%	2%	2%
White	32%	34%	32%	35%	38%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	11%	8%	11%
ELA	Level 3	20%	17%	18%
ELA	Level 2	25%	25%	22%
ELA	Level 1	44%	50%	50%
	ELA Participation	85%	77%	74%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	3%		2%
Math	Level 3	8%		7%
Math	Level 2	17%		16%
Math	Level 1	72%		75%
	Math Participation	77%		65%





Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



Rosa Parks

8960 N Woolsey Ave
503-916-6250

Title I School for 2026-27

K-5 Constructed 2006

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	214	197	177	172	160	161	160	167
Total	**214**	**197**	**177**	**172**	**160**	**161**	**160**	**167**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.00	14.00	12.00	12.00	8.40	8.40
		Counseling Services	1.00	1.00	1.50	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.40	0.40	0.40
		Instructional Spec/ Coach/ Intervention	2.00	3.00	3.20	3.00	2.00	1.80
		Other	1.50	1.50	1.00	1.00	1.00	2.00
	Classified /Non-Rep	Clerical	2.38	2.38	2.38	2.38	2.38	2.15
		Ed. Assistant/ Paraeducator	1.75	3.94	2.19	2.19	2.19	2.15
		Library/Media Services						
		Other	0.38					
	Admin.		2.50	2.00	2.00	2.00	2.00	1.00
School Total			**26.51**	**28.82**	**25.27**	**23.97**	**19.37**	**18.90**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.50	2.10	2.30	2.00	2.50	2.50
		ESL	1.50	1.50	1.50	1.50	1.50	1.00
		Other	1.00	1.00	3.00	3.00	2.00	1.00
	Classified /Non-Rep	Special Education			0.94	2.81	5.63	2.81
		ESL	0.88	0.44	0.44	0.44	0.44	
		Nutrition Services	1.50	1.50	1.50	1.50	1.50	1.50
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other		1.00	5.63	5.63	4.75	4.75
CASR Total			**9.38**	**10.54**	**18.30**	**19.88**	**21.32**	**16.56**
Grand Total			**35.88**	**39.36**	**43.57**	**43.84**	**40.68**	**35.47**
Overall Students per FTE			6.0:1	5.0:1	4.1:1	3.9:1	3.9:1	4.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.90	13.80	10.80	12.00	9.00	9.00
		Gen Fund Equity	2.05	2.30	1.80	1.00		0.80
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I	0.65	0.40	0.28			0.50
		SIA/M98	2.40	3.50	4.50	3.00	2.50	2.25
		Other			0.82	0.60	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.50	1.50	1.50	1.90
		Gen Fund Equity	0.50				0.30	0.20
		Foundation						
		Title I	1.51	2.94	2.80	2.19	1.81	1.33
		SIA/M98					0.88	0.88
		Other	1.00	1.88	0.27	0.88	0.08	
	Admin.	Gen Fund	1.50	1.50	1.50	2.00	1.50	1.00
		Gen Fund Equity	0.50	0.50	0.50		0.50	
		Title I						
		Other	0.50					
School Total			**26.51**	**28.82**	**25.27**	**23.97**	**19.37**	**18.90**

School and CASR	**Licensed**	23.50	25.10	25.50	23.90	18.80	18.10
	Classified/ Non-Rep	9.88	12.26	16.07	17.94	19.88	16.37
	Admin.	2.50	2.00	2.00	2.00	2.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Rosa Parks

8960 N Woolsey Ave
503-916-6250



Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,103,687	$2,183,191	$2,151,503	$2,046,079	$1,838,855	$1,686,413
Associated Payroll Costs	$1,012,468	$1,077,837	$1,077,583	$1,033,282	$1,012,904	$ 991,123
Purchased Services	$ 33,251	$ 17,206	$ 13,459	$ 14,690	$ 17,335	$ 8,496
Supplies and Materials	$ 31,335	$ 48,188	$ 13,870	$ 21,365	$ 62,976	$ 19,314
Capital	$ 14,847					
Other Objects			$ 843		$ 264	$ 252
Total	**$ 3,195,588**	**$ 3,326,422**	**$ 3,257,257**	**$ 3,115,417**	**$ 2,932,334**	**$ 2,705,598**
Dollars per Student	**$ 14,933 :1**	**$ 16,885 :1**	**$ 18,403 :1**	**$ 18,113 :1**	**$ 18,327 :1**	**$ 16,805 :1**

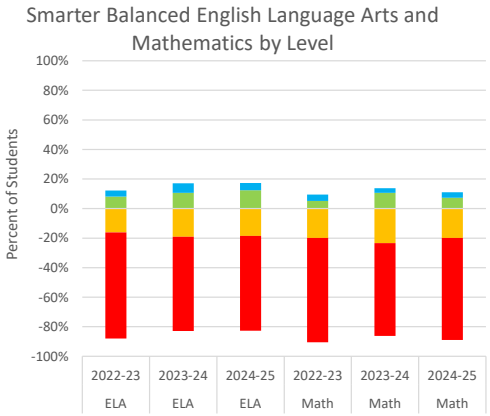
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	58%	61%	66%	75%	88%
*Students with Disabilities	13%	19%	23%	26%	28%
*English Language Learners	33%	37%	30%	32%	35%
*Free-Direct Certification	71%	75%	81%	84%	79%
Black	38%	34%	32%	37%	36%
Latino	33%	39%	40%	37%	36%
Native American	1%	1%	1%	1%	
Pacific Islander	2%	3%	3%	3%	1%
Multi-Race - Other Ancestry	13%	13%	13%	8%	9%
Multi-Race - Asian/White		1%	1%	1%	1%
Asian	1%	1%	1%	2%	3%
White	12%	9%	10%	13%	14%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	4%	6%	5%
ELA	Level 3	8%	11%	12%
ELA	Level 2	16%	19%	19%
ELA	Level 1	72%	64%	64%
	ELA Participation	99%	100%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	4%	3%	4%
Math	Level 3	5%	11%	7%
Math	Level 2	20%	23%	20%
Math	Level 1	71%	63%	69%
	Math Participation	96%	100%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Rose City Park

2334 NE 57th Ave
503-916-6765

K-5 Constructed 1921

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	285	285	248	237	210	196	184	160
Vietnamese Immersion	179	183	216	209	207	202	208	209
Total	**464**	**468**	**464**	**446**	**417**	**398**	**392**	**369**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	26.10	27.60	26.00	24.00	22.00	20.40
		Counseling Services	2.00	1.50	2.00	1.40	1.20	1.00
		Library/Media Services	1.00	1.00	1.00	0.80	0.80	0.80
		Instructional Spec/ Coach/ Intervention	1.00	1.00	1.00	2.00	2.00	1.00
		Other					1.00	
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	1.50	1.50
		Ed. Assistant/ Paraeducator	2.79		1.13	0.44		1.28
		Library/Media Services						
		Other				0.50		1.00
	Admin.		2.00	2.00	1.00	1.00	1.00	1.00
School Total			**36.89**	**35.10**	**34.13**	**32.14**	**29.50**	**27.98**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.50	2.50	1.80	1.00	1.00	1.00
		ESL	1.50	1.50	2.50	2.00	2.00	2.00
		Other						
	Classified /Non-Rep	Special Education	2.81	0.94	0.94			
		ESL	0.87	0.44	0.88	0.44	0.88	
		Nutrition Services	1.44	1.63	2.25	1.63	1.63	1.63
		Custodial	2.73	2.73	2.73	2.73	2.73	2.73
		Other	1.00	1.00	1.00	1.00		
CASR Total			**11.85**	**10.73**	**12.09**	**8.79**	**8.23**	**7.35**
Grand Total			**48.74**	**45.83**	**46.22**	**40.93**	**37.73**	**35.33**
Overall Students per FTE			9.5:1	10.2:1	10.0:1	10.9:1	11.1:1	11.3:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	25.85	26.85	25.65	23.60	22.40	21.00
		Gen Fund Equity	1.25	1.75	1.75	1.00	1.00	
		Gen Fund K-5 Arts	1.50	1.00	1.00	1.60	1.60	1.20
		Foundation		0.20				
		Title I						
		SIA/M98	0.50	1.00	1.00	2.00	2.00	1.00
		Other	1.00	0.30	0.60			
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.90	1.50	1.50	1.90
		Gen Fund Equity	2.51	0.50	0.50			1.88
		Foundation			0.24	1.10		
		Title I						
		SIA/M98						
		Other	0.78		0.49	0.34		
	Admin.	Gen Fund	2.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other		1.00				
School Total			**36.89**	**35.10**	**34.13**	**32.14**	**29.50**	**27.98**

School and CASR	**Licensed**	33.10	35.10	34.30	31.20	30.00	26.20
	Classified/ Non-Rep	13.64	8.73	10.92	8.73	6.73	8.13
	Admin.	2.00	2.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Rose City Park

2334 NE 57th Ave
503-916-6765

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,741,990	$2,925,202	$3,052,652	$3,027,808	$2,940,059	$2,763,423
Associated Payroll Costs	$1,332,289	$1,365,723	$1,460,490	$1,445,340	$1,621,552	$1,577,931
Purchased Services	$ 69,790	$ 20,120	$ 24,873	$ 34,532	$ 22,596	$ 21,768
Supplies and Materials	$ 52,275	$ 52,187	$ 64,981	$ 84,790	$ 46,536	$ 51,524
Capital		$ 36,121		$ 1,556		
Other Objects					$ 504	$ 480
Total	**$ 4,196,344**	**$ 4,399,353**	**$ 4,602,996**	**$ 4,594,027**	**$ 4,631,247**	**$ 4,415,126**
Dollars per Student	**$ 9,044 :1**	**$ 9,400 :1**	**$ 9,920 :1**	**$ 10,301 :1**	**$ 11,106 :1**	**$ 11,093 :1**

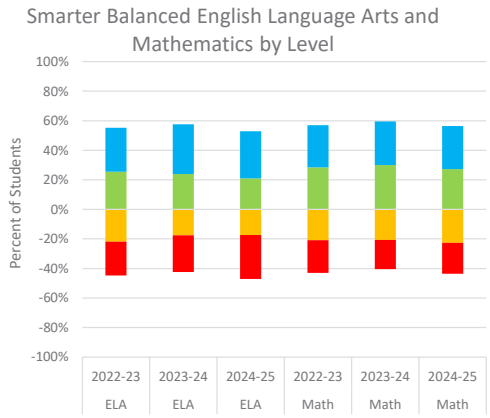
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	25%	29%	36%	39%	48%
*Students with Disabilities	13%	11%	12%	12%	13%
*English Language Learners	19%	19%	20%	21%	21%
*Free-Direct Certification	16%	19%	31%	32%	32%
Black	4%	3%	4%	4%	2%
Latino	8%	8%	6%	6%	8%
Native American		0%	0%		1%
Pacific Islander	1%	2%		0%	1%
Multi-Race - Other Ancestry	6%	6%	7%	6%	5%
Multi-Race - Asian/White	5%	5%	5%	6%	5%
Asian	25%	24%	30%	30%	32%
White	51%	52%	48%	48%	46%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	30%	34%	32%
ELA	Level 3	25%	24%	21%
ELA	Level 2	22%	18%	17%
ELA	Level 1	23%	25%	30%
	ELA Participation	97%	98%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	29%	30%	29%
Math	Level 3	29%	30%	27%
Math	Level 2	21%	21%	23%
Math	Level 1	22%	20%	21%
	Math Participation	95%	97%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Roseway Heights

7334 NE Siskiyou St
503-916-5600

The Oregon Department of Education has identified this school as a Comprehensive Supports for Improvement (CSI) school. Title I School for 2026-27

6-8 Constructed 1923

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	483	471	432	421	415	394	399	388
Spanish Immersion	80	74	83	94	93	89	84	81
Vietnamese Immersion	26	38	36	50	64	80	80	80
Total	**589**	**583**	**551**	**565**	**572**	**563**	**563**	**549**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	31.50	32.80	33.00	29.30	31.20	26.40
		Counseling Services	2.00	2.40	3.00	2.50	2.60	2.40
		Library/Media Services	1.00	1.00	1.00	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention	2.00	2.70	2.00	4.00	2.80	2.50
		Other	1.00	3.00	2.00	2.00	2.00	1.00
	Classified /Non-Rep	Clerical	2.00	2.00	3.00	2.50	3.00	2.80
		Ed. Assistant/ Paraeducator	1.75	1.75				0.40
		Library/Media Services						
		Other	1.00	1.00			1.00	
	Admin.		3.00	3.00	3.00	2.00	2.00	2.00
School Total			**45.25**	**49.65**	**47.00**	**42.80**	**45.10**	**38.00**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.50	5.70	5.50	4.00	4.50	4.00
		ESL	1.50	1.50	2.50	3.00	2.00	2.00
		Other	1.00	1.50	1.00	1.00		
	Classified /Non-Rep	Special Education	3.75	4.69	3.75	4.69	3.75	3.75
		ESL	0.44	0.44	0.88	0.88	0.88	0.44
		Nutrition Services	2.06	2.13	2.13	2.06	2.06	2.06
		Custodial	3.00	3.00	3.73	3.00	3.73	3.75
		Other	1.00	1.00	1.00	1.00	2.00	2.00
CASR Total			**17.25**	**19.95**	**20.48**	**19.63**	**18.92**	**18.00**
Grand Total			**62.51**	**69.61**	**67.48**	**62.43**	**64.02**	**56.00**
Overall Students per FTE			9.4:1	8.4:1	8.2:1	9.1:1	8.9:1	10.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	28.75	30.50	27.70	29.65	31.90	27.10
		Gen Fund Equity	4.50	4.00	3.50	1.50	1.50	1.50
		Gen Fund K-5 Arts						
		Foundation						
		Title I	0.75	1.50	2.18	2.12	1.10	1.15
		SIA/M98	2.50	5.90	6.00	5.00	4.60	2.80
		Other	1.00		1.62	0.03		0.25
	Classified/ Non-Rep	Gen Fund	2.00	3.00	2.00	1.00	1.50	1.90
		Gen Fund Equity		0.15			1.00	
		Foundation						
		Title I	2.75	1.19		0.80	1.25	1.20
		SIA/M98			1.00			
		Other		0.41		0.70	0.25	0.10
	Admin.	Gen Fund	2.00	3.00	3.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other	1.00					
School Total			**45.25**	**49.65**	**47.00**	**42.80**	**45.10**	**38.00**

School and CASR	**Licensed**	44.50	50.60	50.00	46.30	45.60	38.80
	Classified/ Non-Rep	15.01	16.01	14.48	14.13	16.42	15.20
	Admin.	3.00	3.00	3.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Roseway Heights

7334 NE Siskiyou St
503-916-5600

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,509,271	$4,061,586	$4,313,125	$4,315,469	$4,533,239	$4,100,922
Associated Payroll Costs	$1,694,322	$1,953,402	$2,065,283	$2,082,886	$2,536,284	$2,330,184
Purchased Services	$ 18,114	$ 32,471	$ 31,969	$ 27,998	$ 53,113	$ 20,856
Supplies and Materials	$ 42,475	$ 72,521	$ 126,958	$ 61,904	$ 88,324	$ 69,905
Capital	$ 57	$ 255	$ 15,630			
Other Objects					$ 708	$ 624
Total	**$ 5,264,240**	**$ 6,120,235**	**$ 6,552,965**	**$ 6,488,258**	**$ 7,211,668**	**$ 6,522,491**
Dollars per Student	**$ 8,938 :1**	**$ 10,498 :1**	**$ 11,893 :1**	**$ 11,484 :1**	**$ 12,608 :1**	**$ 11,585 :1**

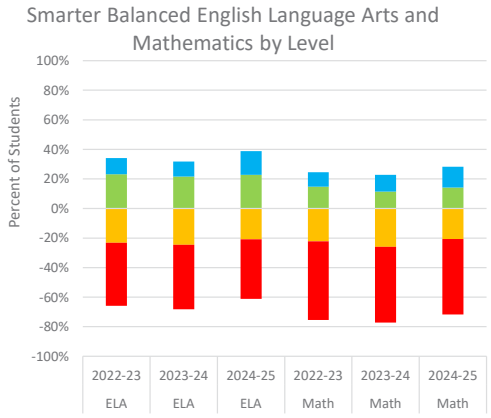
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	32%	36%	44%	45%	52%
*Students with Disabilities	16%	17%	17%	16%	16%
*English Language Learners	13%	14%	17%	18%	16%
*Free-Direct Certification	33%	34%	48%	49%	43%
Black	12%	11%	12%	11%	10%
Latino	22%	22%	24%	25%	21%
Native American	1%	1%	1%	1%	1%
Pacific Islander	1%	1%	2%	1%	2%
Multi-Race - Other Ancestry	6%	7%	6%	8%	8%
Multi-Race - Asian/White	2%	3%	3%	2%	3%
Asian	14%	12%	11%	11%	13%
White	43%	43%	42%	41%	43%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	11%	10%	16%
ELA	Level 3	23%	22%	23%
ELA	Level 2	23%	25%	21%
ELA	Level 1	43%	44%	40%
	ELA Participation	73%	71%	88%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	10%	11%	14%
Math	Level 3	15%	12%	14%
Math	Level 2	22%	26%	21%
Math	Level 1	53%	51%	51%
	Math Participation	70%	69%	85%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Sabin

4013 NE 18th Ave
503-916-6482

K-5 Constructed 1927

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	340	312	302	293	269	259	238	250
Total	**340**	**312**	**302**	**293**	**269**	**259**	**238**	**250**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	16.75	15.50	15.50	14.10	12.60	11.60
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention	2.00	1.00	1.00	1.80	1.75	1.00
		Other		1.00	1.00	1.00		0.50
	Classified /Non-Rep	Clerical	1.75	1.75	1.75	1.75	1.50	1.50
		Ed. Assistant/ Paraeducator	1.50	1.50	1.50	0.50		0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		2.00	2.00	2.00	2.00	1.75	1.00
School Total			**26.00**	**24.75**	**24.75**	**22.75**	**19.20**	**17.40**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.00	4.60	4.80	4.00	4.00	4.00
		ESL	0.25	0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	8.44	8.44	10.32	8.44	8.44	6.57
		ESL						
		Nutrition Services	1.38	1.38	1.38	1.31	1.31	1.31
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other						
CASR Total			**17.07**	**17.67**	**19.74**	**17.01**	**17.01**	**15.13**
Grand Total			**43.07**	**42.42**	**44.49**	**39.76**	**36.21**	**32.53**
Overall Students per FTE			7.9:1	7.4:1	6.8:1	7.4:1	7.4:1	8.0:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.25	16.00	16.12	15.40	13.40	12.20
		Gen Fund Equity	0.50		0.25	0.50	0.14	0.50
		Gen Fund K-5 Arts	1.00	1.00	0.50	0.80	0.80	0.80
		Foundation			0.17	0.08		
		Title I						
		SIA/M98	2.50	2.00	1.50	1.50	1.50	1.00
		Other	3.00		0.46	0.22	0.11	
	Classified/ Non-Rep	Gen Fund	2.90	2.00	1.50	1.50	1.50	1.90
		Gen Fund Equity	0.60	0.60	0.50			
		Foundation	0.25	0.28	0.80	0.46		
		Title I						
		SIA/M98						
		Other		0.88	0.95	0.29		
	Admin.	Gen Fund	1.50	2.00	2.00	2.00	1.50	1.00
		Gen Fund Equity	0.50				0.25	
		Title I						
		Other						
School Total			**26.00**	**24.75**	**24.75**	**22.75**	**19.20**	**17.40**

School and CASR	**Licensed**	24.50	23.85	24.05	22.75	20.20	18.75
	Classified/ Non-Rep	16.57	16.57	18.44	15.01	14.26	12.78
	Admin.	2.00	2.00	2.00	2.00	1.75	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Sabin

4013 NE 18th Ave
503-916-6482

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,958,830	$2,024,247	$2,126,577	$2,251,197	$1,993,269	$1,763,193
Associated Payroll Costs	$1,027,342	$ 990,566	$1,069,941	$1,083,972	$1,084,999	$1,002,466
Purchased Services	$ 7,550	$ 6,917	$ 9,374	$ 9,324	$ 16,924	$ 11,508
Supplies and Materials	$ 43,527	$ 50,359	$ 37,369	$ 30,962	$ 11,928	$ 14,982
Capital						
Other Objects				$ 132	$ 360	$ 348
Total	**$ 3,037,250**	**$ 3,072,090**	**$ 3,243,260**	**$ 3,375,587**	**$ 3,107,480**	**$ 2,792,497**
Dollars per Student	**$ 8,933 :1**	**$ 9,846 :1**	**$ 10,739 :1**	**$ 11,521 :1**	**$ 11,552 :1**	**$ 10,782 :1**

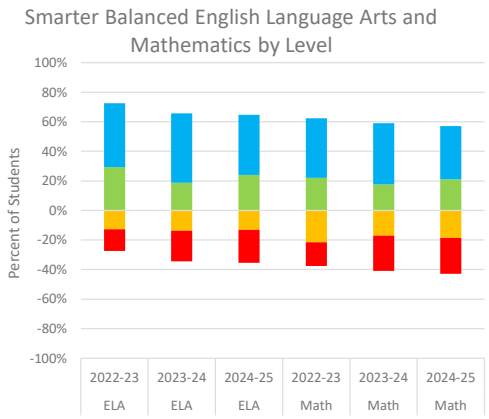
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	21%	23%	29%	34%	40%
*Students with Disabilities	12%	16%	17%	20%	22%
*English Language Learners	2%	1%	2%	4%	4%
*Free-Direct Certification	17%	18%	28%	30%	28%
Black	14%	14%	13%	15%	10%
Latino	8%	9%	9%	8%	9%
Native American	1%	1%	1%	1%	2%
Pacific Islander				0%	0%
Multi-Race - Other Ancestry	6%	7%	11%	9%	9%
Multi-Race - Asian/White	2%	2%	3%	4%	5%
Asian	2%	1%	1%	1%	2%
White	69%	66%	63%	61%	63%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	43%	47%	41%
ELA	Level 3	29%	19%	24%
ELA	Level 2	13%	14%	13%
ELA	Level 1	15%	21%	22%
	ELA Participation	98%	96%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	40%	42%	36%
Math	Level 3	22%	18%	21%
Math	Level 2	22%	17%	19%
Math	Level 1	16%	24%	24%
	Math Participation	97%	95%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



Scott

6700 NE Prescott St
503-916-6369

Title I School for 2026-27

K-5 Constructed 1949

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	215	236	265	252	254	256	256	242
Spanish Immersion	214	217	235	242	222	221	223	227
Total	**429**	**453**	**500**	**494**	**476**	**477**	**479**	**469**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	28.00	28.50	28.00	27.80	25.20	26.20
		Counseling Services	1.00	1.00	1.00	1.40	1.40	1.40
		Library/Media Services	0.50	0.50	1.00	1.00	1.00	1.00
		Instructional Spec/ Coach/ Intervention	1.20	2.00	4.00	5.00	4.00	4.00
		Other	2.00	2.00	1.00	2.00	2.00	2.00
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	5.26	5.26	4.38	3.50	1.38	2.15
		Library/Media Services	0.50	0.50				
		Other	0.88	1.00	1.88	1.00	1.00	1.00
	Admin.		2.00	2.00	2.00	2.00	1.00	1.00
School Total			**43.33**	**44.76**	**45.25**	**45.70**	**38.98**	**40.75**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.50	4.60	4.40	3.00	3.00	2.50
		ESL	3.00	3.50	3.00	3.00	3.00	2.50
		Other	1.00	1.00	1.00			
	Classified /Non-Rep	Special Education	4.69	6.57	6.57	4.69	4.69	4.69
		ESL		0.88	1.31	0.88	0.88	0.44
		Nutrition Services	3.75	2.88	2.88	2.25	2.38	2.38
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other						
CASR Total			**17.94**	**22.42**	**22.16**	**16.82**	**16.94**	**15.50**
Grand Total			**61.27**	**67.17**	**67.41**	**62.52**	**55.92**	**56.25**
Overall Students per FTE			7.0:1	6.7:1	7.4:1	7.9:1	8.5:1	8.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	26.70	23.10	23.55	28.00	26.50	26.00
		Gen Fund Equity	2.69	2.90	3.30	1.00	1.00	1.90
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.60	1.60	1.60
		Foundation						
		Title I	0.41	1.50	0.40	2.60	1.00	1.20
		SIA/M98	1.90	4.50	6.50	3.50	3.00	3.65
		Other		1.00	0.25	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	2.00	2.00	1.50	1.50	2.78	2.30
		Gen Fund Equity	0.50	0.80		1.00	1.00	
		Foundation						
		Title I	4.13	3.08	3.75	0.50	0.60	1.10
		SIA/M98			2.00	3.50		1.75
		Other	2.00	2.88	1.00			
	Admin.	Gen Fund	1.50	1.50	1.50	2.00	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50			
		Title I						
		Other						
School Total			**43.33**	**44.76**	**45.25**	**45.70**	**38.98**	**40.75**

School and CASR	**Licensed**	39.20	43.10	43.40	43.20	39.60	39.60
	Classified/ Non-Rep	20.07	22.07	22.01	17.32	15.32	15.65
	Admin.	2.00	2.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Scott

6700 NE Prescott St
503-916-6369

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,030,164	$3,296,705	$3,748,194	$3,804,007	$3,541,717	$3,798,098
Associated Payroll Costs	$1,538,574	$1,659,576	$1,906,840	$1,923,542	$2,012,638	$2,242,981
Purchased Services	$ 83,368	$ 35,530	$ 33,022	$ 44,287	$ 18,180	$ 18,756
Supplies and Materials	$ 165,875	$ 121,868	$ 123,390	$ 99,378	$ 81,150	$ 28,096
Capital	$ 6,974	$ 503				
Other Objects	$ 5,800	$ 599			$ 552	$ 564
Total	**$ 4,830,755**	**$ 5,114,780**	**$ 5,811,446**	**$ 5,871,213**	**$ 5,654,237**	**$ 6,088,495**
Dollars per Student	**$ 11,261 :1**	**$ 11,291 :1**	**$ 11,623 :1**	**$ 11,885 :1**	**$ 11,879 :1**	**$ 12,764 :1**

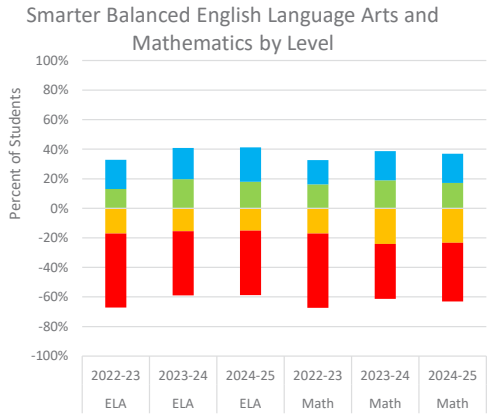
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	41%	43%	46%	54%	65%
*Students with Disabilities	17%	18%	17%	18%	20%
*English Language Learners	30%	29%	27%	25%	23%
*Free-Direct Certification	48%	44%	56%	54%	51%
Black	15%	12%	14%	11%	10%
Latino	38%	37%	34%	38%	33%
Native American	1%	1%	1%	1%	3%
Pacific Islander	2%	2%	1%	2%	3%
Multi-Race - Other Ancestry	5%	8%	8%	8%	7%
Multi-Race - Asian/White	2%	1%	2%	2%	3%
Asian	3%	4%	5%	3%	3%
White	35%	36%	35%	36%	38%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	20%	21%	23%
ELA	Level 3	13%	20%	18%
ELA	Level 2	17%	16%	15%
ELA	Level 1	50%	44%	44%
	ELA Participation	98%	97%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	17%	20%	20%
Math	Level 3	16%	19%	17%
Math	Level 2	17%	24%	23%
Math	Level 1	50%	37%	40%
	Math Participation	95%	95%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Sellwood

8300 SE 15th Ave
503-916-5656

6-8 Constructed 1913

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	553	563	567	576	564	537	524	486
Total	**553**	**563**	**567**	**576**	**564**	**537**	**524**	**486**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	23.50	23.50	24.50	25.70	24.85	23.05
		Counseling Services	2.50	2.00	2.00	2.00	2.00	2.00
		Library/Media Services	0.50	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention			1.00	2.00	0.90	0.90
		Other			1.00	1.00	1.00	0.30
	Classified /Non-Rep	Clerical	2.00	2.00	3.00	2.00	2.00	1.80
		Ed. Assistant/ Paraeducator	0.50	0.75	1.50	0.25		0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		3.00	3.00	2.00	2.00	2.00	2.00
School Total			**32.50**	**32.25**	**36.00**	**35.45**	**33.25**	**30.95**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	3.80	2.60	2.50	2.50	2.50
		ESL	0.25	0.25	0.25		0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	2.81	2.81	0.94		0.94	0.94
		ESL						
		Nutrition Services	0.88	0.88	1.75	1.25	1.25	1.25
		Custodial	5.00	5.00	4.00	4.00	4.00	5.00
		Other			1.00	1.00	2.00	2.00
CASR Total			**11.94**	**12.74**	**10.54**	**8.75**	**10.94**	**11.94**
Grand Total			**44.44**	**44.99**	**46.54**	**44.20**	**44.19**	**42.89**
Overall Students per FTE			12.4:1	12.5:1	12.2:1	13.0:1	12.8:1	12.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	24.75	23.25	27.53	27.30	27.35	25.15
		Gen Fund Equity						
		Gen Fund K-5 Arts						
		Foundation	0.25	0.25	0.32	1.30		
		Title I						
		SIA/M98	1.50	2.50	0.50	2.60	1.90	1.60
		Other			0.66			
	Classified/ Non-Rep	Gen Fund	2.50	2.50	4.75	1.82	2.00	2.20
		Gen Fund Equity						
		Foundation	0.50	0.75	0.25	0.43		
		Title I						
		SIA/M98						
		Other						
	Admin.	Gen Fund	2.00	3.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other	1.00					
School Total			**32.50**	**32.25**	**36.00**	**35.45**	**33.25**	**30.95**

School and CASR	**Licensed**	29.75	30.05	31.85	33.70	32.00	29.50
	Classified/ Non-Rep	11.69	11.94	12.69	8.50	10.19	11.39
	Admin.	3.00	3.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Sellwood

8300 SE 15th Ave
503-916-5656

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,945,486	$2,841,954	$3,328,137	$3,465,707	$3,388,569	$3,247,121
Associated Payroll Costs	$1,360,357	$1,345,867	$1,608,325	$1,611,344	$1,838,099	$1,831,314
Purchased Services	$ 9,060	$ 10,262	$ 13,534	$ 19,950	$ 20,964	$ 20,160
Supplies and Materials	$ 57,875	$ 67,895	$ 73,144	$ 75,574	$ 8,665	$ 30,088
Capital	$ 154	$ 55				
Other Objects	$ 13		$ 7,518	$ 970	$ 636	$ 612
Total	**$ 4,372,944**	**$ 4,266,033**	**$ 5,030,658**	**$ 5,173,546**	**$ 5,256,933**	**$ 5,129,295**
Dollars per Student	**$ 7,908 :1**	**$ 7,577 :1**	**$ 8,872 :1**	**$ 8,982 :1**	**$ 9,321 :1**	**$ 9,552 :1**

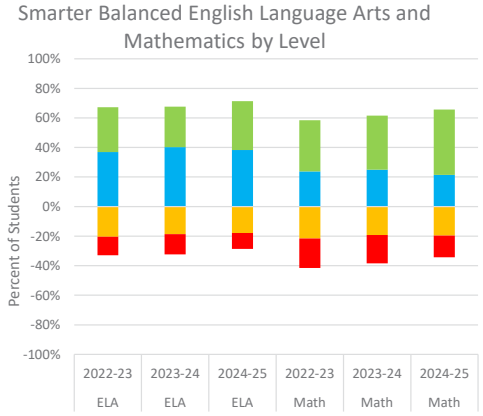
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	13%	16%	18%	22%	25%
*Students with Disabilities	16%	16%	13%	13%	14%
*English Language Learners				1%	2%
*Free-Direct Certification	7%	8%	12%	13%	12%
Black	1%	1%	1%	1%	1%
Latino	7%	7%	7%	9%	8%
Native American	0%	0%	0%		
Pacific Islander					
Multi-Race - Other Ancestry	5%	5%	5%	4%	5%
Multi-Race - Asian/White	7%	7%	6%	5%	6%
Asian	2%	2%	2%	2%	2%
White	78%	78%	79%	79%	79%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	30%	27%	33%
ELA	Level 3	37%	40%	38%
ELA	Level 2	21%	19%	18%
ELA	Level 1	12%	14%	11%
	ELA Participation	93%	89%	96%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	35%	37%	44%
Math	Level 3	24%	25%	22%
Math	Level 2	22%	19%	20%
Math	Level 1	20%	19%	15%
	Math Participation	88%	89%	95%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



Sitton

9930 N Smith St
503-916-6277

Title I School for 2026-27

K-5 Constructed 1949

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	190	226	207	206	207	206	206	199
Spanish Immersion	117	120	128	133	138	135	130	124
Total	**307**	**346**	**335**	**339**	**345**	**341**	**336**	**323**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	21.10	19.90	21.40	19.93	18.80	19.80
		Counseling Services	1.00	1.00	0.80	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	1.00	0.80	0.80
		Instructional Spec/ Coach/ Intervention	2.50	2.50	3.20	3.70	3.00	3.00
		Other	1.50	1.50	2.00	2.00	1.00	1.00
	Classified /Non-Rep	Clerical	2.00	1.80	1.80	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	3.13	3.50	3.50	0.88	0.88	1.28
		Library/Media Services						
		Other	0.50		0.30			
	Admin.		2.00	2.00	2.00	1.80	2.00	1.00
School Total			**34.73**	**33.20**	**36.00**	**32.30**	**29.48**	**29.88**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	4.00	5.20	5.20	3.50	4.00	4.00
		ESL	2.00	2.00	2.00	2.88	3.00	2.00
		Other	1.00	1.00	1.00	3.00	2.00	2.00
	Classified /Non-Rep	Special Education	7.50	8.44	9.38	9.38	8.44	8.44
		ESL		0.87	1.75		0.88	0.88
		Nutrition Services	2.56	3.38	2.94	2.00	2.06	2.06
		Custodial	2.73	3.73	3.00	3.00	3.00	3.00
		Other				3.75	3.75	3.75
CASR Total			**19.79**	**24.62**	**25.27**	**27.51**	**27.13**	**26.13**
Grand Total			**54.52**	**57.82**	**61.27**	**59.81**	**56.61**	**56.01**
Overall Students per FTE			5.6:1	6.0:1	5.5:1	5.7:1	6.1:1	6.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	20.40	18.20	19.20	19.80	19.00	19.00
		Gen Fund Equity	2.05	2.80	2.80	1.36	0.10	1.50
		Gen Fund K-5 Arts	1.00	0.50	1.00	1.20	1.20	1.20
		Foundation						
		Title I	0.15	0.90	0.70	1.27	0.80	1.40
		SIA/M98	3.50	3.00	4.50	3.50	3.00	2.25
		Other		0.50	0.20	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.50	1.50	1.50	1.50	1.90
		Gen Fund Equity	0.50					
		Foundation						
		Title I	2.13	1.43	2.30	0.50	0.50	0.50
		SIA/M98			1.50	0.88	0.88	0.88
		Other	1.50	2.38	0.30			
	Admin.	Gen Fund	1.50	1.50	1.50	1.70	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50	0.10	1.00	
		Title I						
		Other						
School Total			**34.73**	**33.20**	**36.00**	**32.30**	**29.48**	**29.88**

School and CASR	**Licensed**	34.10	34.10	36.60	37.00	33.60	33.60
	Classified/ Non-Rep	18.42	21.72	22.67	21.01	21.01	21.41
	Admin.	2.00	2.00	2.00	1.80	2.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Sitton

9930 N Smith St
503-916-6277

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,480,954	$2,540,387	$2,994,217	$2,890,280	$2,831,496	$2,905,619
Associated Payroll Costs	$1,212,878	$1,250,213	$1,478,066	$1,421,675	$1,589,925	$1,708,849
Purchased Services	$ 43,274	$ 52,737	$ 73,051	$ 72,886	$ 14,076	$ 20,961
Supplies and Materials	$ 115,951	$ 136,726	$ 120,705	$ 38,931	$ 72,292	$ 14,004
Capital						
Other Objects					$ 420	$ 420
Total	**$ 3,853,058**	**$ 3,980,062**	**$ 4,666,038**	**$ 4,423,772**	**$ 4,508,209**	**$ 4,649,853**
Dollars per Student	**$ 12,551 :1**	**$ 11,503 :1**	**$ 13,928 :1**	**$ 13,049 :1**	**$ 13,067 :1**	**$ 13,636 :1**

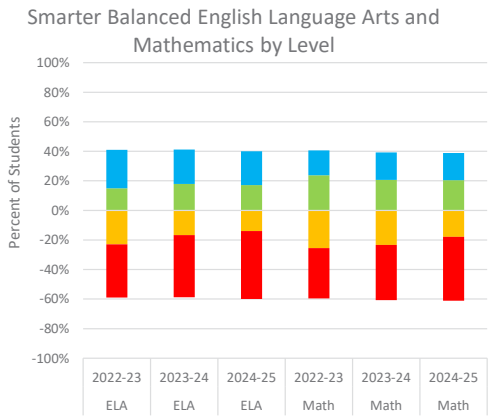
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	50%	54%	61%	65%	73%
*Students with Disabilities	20%	21%	23%	20%	23%
*English Language Learners	30%	30%	29%	33%	31%
*Free-Direct Certification	53%	52%	63%	62%	60%
Black	12%	12%	12%	12%	12%
Latino	43%	41%	44%	44%	39%
Native American	2%	1%	1%	1%	1%
Pacific Islander	1%	1%	1%	1%	1%
Multi-Race - Other Ancestry	11%	14%	11%	10%	10%
Multi-Race - Asian/White	0%		1%	1%	1%
Asian	3%	2%	3%	3%	3%
White	28%	30%	28%	30%	33%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	26%	23%	23%
ELA	Level 3	15%	18%	17%
ELA	Level 2	23%	17%	14%
ELA	Level 1	36%	42%	46%
	ELA Participation	98%	99%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	17%	19%	19%
Math	Level 3	24%	21%	20%
Math	Level 2	25%	23%	18%
Math	Level 1	34%	37%	43%
	Math Participation	97%	98%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Skyline

11536 NW Skyline Blvd
503-916-5212

K-8 Constructed 1939

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	205	215	218	226	207	206	200	202
Total	**205**	**215**	**218**	**226**	**207**	**206**	**200**	**202**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	12.00	12.50	12.50	12.08	11.78	11.48
		Counseling Services	2.00	1.50	1.50	1.00	1.00	1.00
		Library/Media Services	0.50	0.75	0.75	0.59	0.40	0.40
		Instructional Spec/ Coach/ Intervention			1.74	1.33	1.17	1.17
		Other						
	Classified /Non-Rep	Clerical	1.50	1.50	2.00	1.80	1.00	1.00
		Ed. Assistant/ Paraeducator	0.70	0.50	1.88	0.88		0.40
		Library/Media Services	0.50	0.50				
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**18.20**	**18.25**	**21.36**	**18.68**	**16.35**	**16.45**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	0.50	1.40	1.60	1.00	1.00	1.00
		ESL		0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	0.94	0.94	0.94	0.94	0.94	0.94
		ESL						
		Nutrition Services	0.75	0.75	0.75	1.00	1.00	1.00
		Custodial	2.00	2.00	2.00	2.00	2.00	2.00
		Other						
CASR Total			**4.19**	**5.34**	**5.54**	**5.19**	**5.19**	**5.19**
Grand Total			**22.39**	**23.59**	**26.90**	**23.86**	**21.54**	**21.64**
Overall Students per FTE			9.2:1	9.1:1	8.1:1	9.5:1	9.6:1	9.5:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.00	13.00	14.56	13.35	12.95	12.65
		Gen Fund Equity						
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.40	0.40	0.40
		Foundation		0.20		0.25		
		Title I						
		SIA/M98	1.00	1.00	1.00	1.00	1.00	1.00
		Other		0.05	0.43			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.87	1.80	1.00	1.40
		Gen Fund Equity						
		Foundation	0.70	0.50	0.50	0.88		
		Title I						
		SIA/M98						
		Other			0.50			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**18.20**	**18.25**	**21.36**	**18.68**	**16.35**	**16.45**

School and CASR	**Licensed**	15.00	16.40	18.34	16.25	15.60	15.30
	Classified/ Non-Rep	6.39	6.19	7.56	6.61	4.94	5.34
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Skyline

11536 NW Skyline Blvd
503-916-5212

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,412,702	$1,521,258	$1,850,756	$1,715,071	$1,650,524	$1,685,773
Associated Payroll Costs	$ 695,063	$ 741,556	$ 857,604	$ 811,253	$ 900,288	$ 954,469
Purchased Services	$ 2,789	$ 4,859	$ 15,197	$ 22,776	$ 10,620	$ 9,840
Supplies and Materials	$ 11,640	$ 20,613	$ 30,675	$ 22,710	$ 10,584	$ 19,816
Capital	$ 1,499					
Other Objects					$ 324	$ 300
Total	**$ 2,123,693**	**$ 2,288,286**	**$ 2,754,233**	**$ 2,571,809**	**$ 2,572,340**	**$ 2,670,198**
Dollars per Student	**$ 10,359 :1**	**$ 10,643 :1**	**$ 12,634 :1**	**$ 11,380 :1**	**$ 12,427 :1**	**$ 12,962 :1**

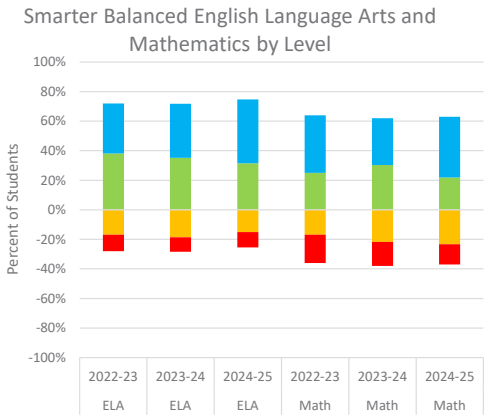
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	19%	21%	21%	24%	29%
*Students with Disabilities	12%	12%	18%	18%	17%
*English Language Learners		1%	1%	2%	3%
*Free-Direct Certification	8%	9%	12%	12%	13%
Black				2%	2%
Latino	13%	12%	12%	12%	14%
Native American		1%	1%		
Pacific Islander		1%	1%	0%	1%
Multi-Race - Other Ancestry	2%	4%	4%	5%	4%
Multi-Race - Asian/White	9%	9%	10%	10%	11%
Asian	3%	4%	5%	4%	4%
White	73%	70%	69%	67%	65%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	34%	37%	43%
ELA	Level 3	38%	35%	32%
ELA	Level 2	17%	19%	15%
ELA	Level 1	11%	10%	10%
	ELA Participation	99%	99%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	39%	32%	41%
Math	Level 3	25%	30%	22%
Math	Level 2	17%	22%	23%
Math	Level 1	19%	16%	14%
	Math Participation	99%	97%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Stephenson

2627 SW Stephenson St
503-916-6318

K-5 Constructed 1964

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	320	307	310	285	281	270	275	269
Total	**320**	**307**	**310**	**285**	**281**	**270**	**275**	**269**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	17.20	15.00	14.00	13.80	14.60	12.60
		Counseling Services	1.50	1.50	1.50	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention			1.00	1.00	1.00	1.00
		Other						
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	0.50	0.50	1.82	1.38		0.40
		Library/Media Services						
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**22.70**	**20.50**	**21.82**	**20.28**	**19.70**	**17.90**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.00	2.80	3.00	2.00	2.00	2.00
		ESL	0.25	0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	3.75	2.81	2.81	3.75	3.75	3.75
		ESL						
		Nutrition Services	0.88	0.88	0.88	1.00	1.00	1.00
		Custodial		2.00	2.00	2.00	2.00	2.00
		Other						
CASR Total			**6.88**	**8.74**	**8.94**	**9.00**	**9.00**	**9.00**
Grand Total			**29.58**	**29.24**	**30.76**	**29.28**	**28.70**	**26.90**
Overall Students per FTE			10.8:1	10.5:1	10.1:1	9.7:1	9.8:1	10.0:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	17.95	14.75	16.25	14.40	15.40	13.20
		Gen Fund Equity						
		Gen Fund K-5 Arts	1.00	1.00	0.50	1.00	0.80	0.80
		Foundation	0.25	0.25	0.25			
		Title I						
		SIA/M98	0.50	0.50	0.50	1.00	1.00	1.00
		Other		1.00				
	Classified/ Non-Rep	Gen Fund	2.00	2.00	1.79	2.00	1.50	1.90
		Gen Fund Equity						
		Foundation				0.88		
		Title I						
		SIA/M98						
		Other			1.53			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**22.70**	**20.50**	**21.82**	**20.28**	**19.70**	**17.90**

School and CASR	**Licensed**	21.95	20.55	20.75	18.65	19.45	17.25
	Classified/ Non-Rep	6.63	7.69	9.01	9.63	8.25	8.65
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Stephenson

2627 SW Stephenson St
503-916-6318

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,816,620	$1,701,357	$2,052,419	$1,800,949	$1,987,440	$1,814,726
Associated Payroll Costs	$ 896,800	$ 768,455	$ 913,707	$ 850,303	$1,060,007	$1,019,356
Purchased Services	$ 4,691	$ 4,888	$ 4,655	$ 4,299	$ 12,048	$ 11,892
Supplies and Materials	$ 22,314	$ 51,614	$ 33,451	$ 58,125	$ 12,024	$ 11,844
Capital						
Other Objects					$ 360	$ 360
Total	**$ 2,740,425**	**$ 2,526,314**	**$ 3,004,232**	**$ 2,713,676**	**$ 3,071,879**	**$ 2,858,178**
Dollars per Student	**$ 8,564 :1**	**$ 8,229 :1**	**$ 9,691 :1**	**$ 9,522 :1**	**$ 10,932 :1**	**$ 10,586 :1**

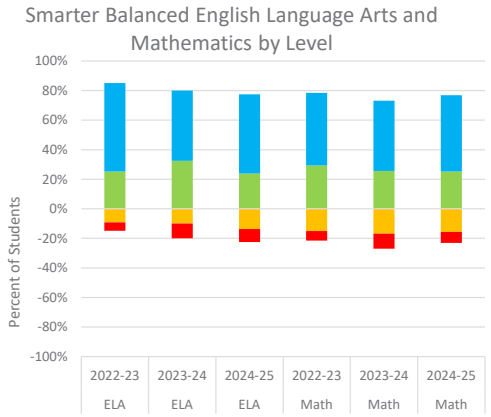
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	15%	18%	20%	22%	26%
*Students with Disabilities	11%	15%	20%	17%	17%
*English Language Learners	4%	3%	3%	3%	3%
*Free-Direct Certification	7%	6%	9%	9%	9%
Black	2%	2%	3%	2%	3%
Latino	10%	7%	8%	8%	10%
Native American	0%				0%
Pacific Islander	0%	0%	0%	0%	
Multi-Race - Other Ancestry	4%	4%	3%	5%	4%
Multi-Race - Asian/White	9%	8%	9%	10%	11%
Asian	3%	3%	3%	3%	4%
White	71%	76%	74%	72%	68%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	60%	48%	54%
ELA	Level 3	25%	33%	24%
ELA	Level 2	9%	10%	14%
ELA	Level 1	6%	10%	9%
	ELA Participation	98%	99%	97%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	49%	48%	52%
Math	Level 3	29%	26%	25%
Math	Level 2	15%	17%	16%
Math	Level 1	7%	10%	8%
	Math Participation	97%	99%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.



Sunnyside Environmental

3421 SE Salmon St
503-916-6226

K-8 Constructed 1925

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	469	465	447	461	485	483	487	484
Total	**469**	**465**	**447**	**461**	**485**	**483**	**487**	**484**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	23.75	23.25	23.25	23.90	23.40	22.50
		Counseling Services	1.50	1.50	1.50	1.50	1.40	1.80
		Library/Media Services	1.00	1.00	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention			1.00	1.00	1.50	1.50
		Other	0.50					
	Classified /Non-Rep	Clerical	2.90	2.90	3.60	2.00	2.00	1.80
		Ed. Assistant/ Paraeducator		0.50				0.40
		Library/Media Services						
		Other						
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**31.65**	**31.15**	**31.85**	**31.00**	**30.90**	**30.60**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.50	3.70	3.70	3.00	3.00	3.00
		ESL	0.25	0.25	0.25	0.25	0.25	0.25
		Other						
	Classified /Non-Rep	Special Education	2.81	2.81	2.81	2.81	2.81	1.88
		ESL						
		Nutrition Services	1.50	1.50	1.31	1.63	1.63	1.63
		Custodial	3.00	3.00	3.00	3.00	2.73	2.73
		Other						
CASR Total			**10.06**	**11.26**	**11.08**	**10.69**	**10.41**	**9.48**
Grand Total			**41.71**	**42.42**	**42.93**	**41.69**	**41.31**	**40.08**
Overall Students per FTE			11.2:1	11.0:1	10.4:1	11.1:1	11.7:1	12.1:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	23.75	21.75	23.23	24.20	23.60	23.20
		Gen Fund Equity	2.00	1.00	1.00	1.00	1.00	0.50
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I						
		SIA/M98	0.50	2.00	1.00	1.00	1.50	1.90
		Other		0.50	0.53			
	Classified/ Non-Rep	Gen Fund	2.40	2.40	2.55	1.25	2.00	2.20
		Gen Fund Equity						
		Foundation	0.16	0.95	0.85	0.75		
		Title I						
		SIA/M98						
		Other	0.34	0.05	0.20			
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**31.65**	**31.15**	**31.85**	**31.00**	**30.90**	**30.60**

School and CASR	**Licensed**	29.50	29.70	30.20	30.25	30.15	29.65
	Classified/ Non-Rep	10.21	10.71	10.73	9.44	9.16	8.43
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Sunnyside Environmental

3421 SE Salmon St
503-916-6226



Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,657,475	$2,695,277	$3,059,984	$3,059,654	$3,159,968	$3,217,439
Associated Payroll Costs	$1,264,977	$1,259,713	$1,448,242	$1,445,065	$1,698,172	$1,814,396
Purchased Services	$ 4,650	$ 4,976	$ 6,010	$ 11,075	$ 17,556	$ 7,170
Supplies and Materials	$ 81,934	$ 256,329	$ 229,183	$ 208,889	$ 17,496	$ 13,420
Capital	$ 1,599					
Other Objects			$ 187		$ 528	$ 552
Total	**$ 4,010,635**	**$ 4,216,295**	**$ 4,743,605**	**$ 4,724,683**	**$ 4,893,720**	**$ 5,052,977**
Dollars per Student	**$ 8,551 :1**	**$ 9,067 :1**	**$ 10,612 :1**	**$ 10,249 :1**	**$ 10,090 :1**	**$ 10,462 :1**

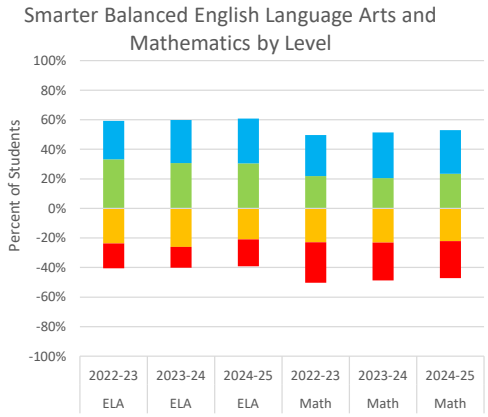
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	28%	31%	34%	37%	37%
*Students with Disabilities	17%	19%	21%	21%	23%
*English Language Learners	1%	1%	1%	1%	1%
*Free-Direct Certification	14%	12%	22%	22%	18%
Black	2%	2%	3%	2%	1%
Latino	11%	11%	11%	12%	11%
Native American	0%				
Pacific Islander	0%	0%	0%	0%	0%
Multi-Race - Other Ancestry	8%	7%	8%	7%	6%
Multi-Race - Asian/White	6%	7%	7%	7%	7%
Asian	1%	1%	1%	2%	1%
White	72%	72%	70%	71%	74%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	26%	29%	30%
ELA	Level 3	33%	31%	30%
ELA	Level 2	24%	26%	21%
ELA	Level 1	17%	14%	18%
	ELA Participation	91%	89%	95%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	28%	31%	30%
Math	Level 3	22%	21%	23%
Math	Level 2	23%	23%	22%
Math	Level 1	27%	26%	25%
	Math Participation	90%	90%	95%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Vernon

2044 NE Killingsworth St
503-916-6415

K-8 Constructed 1931

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	517	555	578	563	541	515	494	490
Total	**517**	**555**	**578**	**563**	**541**	**515**	**494**	**490**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	31.50	30.00	28.25	25.85	26.10	23.05
		Counseling Services	2.00	2.00	2.00	2.00	2.00	1.60
		Library/Media Services	1.00	1.00	1.00	1.00	1.00	0.60
		Instructional Spec/ Coach/ Intervention			2.25	4.05	3.00	1.50
		Other			1.00	0.60	1.00	1.60
	Classified /Non-Rep	Clerical	2.00	2.00	3.00	2.00	2.00	2.00
		Ed. Assistant/ Paraeducator	0.75			0.75		0.40
		Library/Media Services						
		Other	0.75		1.00	1.00	1.00	1.00
	Admin.		2.00	2.00	2.00	2.00	1.00	1.00
School Total			**40.00**	**37.00**	**40.50**	**39.25**	**37.10**	**32.75**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	2.00	3.00	3.20	2.00	2.00	1.50
		ESL	1.00	0.50	1.00	1.00	1.00	1.00
		Other						
	Classified /Non-Rep	Special Education	1.88	1.88	0.94	1.88	0.94	
		ESL						
		Nutrition Services	1.44	1.63	1.69	1.69	1.69	1.69
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other						
CASR Total			**9.31**	**10.00**	**9.83**	**9.56**	**8.63**	**7.19**
Grand Total			**49.31**	**47.00**	**50.33**	**48.81**	**45.73**	**39.94**
Overall Students per FTE			10.5:1	11.8:1	11.5:1	11.5:1	11.8:1	12.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	27.95	26.25	29.25	28.75	29.25	25.20
		Gen Fund Equity	2.25	2.75	2.25	0.75	0.75	0.25
		Gen Fund K-5 Arts	1.00	1.00	1.00	1.20	1.20	0.80
		Foundation	0.30	0.13				
		Title I						
		SIA/M98	1.00	1.00	1.00	2.80	1.90	2.10
		Other	2.00	1.87	1.00			
	Classified/ Non-Rep	Gen Fund	2.00	1.50	2.50	2.20	1.50	1.90
		Gen Fund Equity	1.50	0.50	1.50	1.50	1.50	1.50
		Foundation						
		Title I						
		SIA/M98						
		Other				0.05		
	Admin.	Gen Fund	2.00	2.00	2.00	2.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**40.00**	**37.00**	**40.50**	**39.25**	**37.10**	**32.75**

School and CASR	**Licensed**	37.50	36.50	38.70	36.50	36.10	30.85
	Classified/ Non-Rep	9.81	8.50	9.63	10.31	8.63	8.09
	Admin.	2.00	2.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Vernon

2044 NE Killingsworth St
503-916-6415

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,223,427	$3,154,568	$3,737,353	$3,799,640	$3,736,462	$3,349,276
Associated Payroll Costs	$1,531,235	$1,472,993	$1,765,203	$1,818,382	$2,038,874	$1,889,915
Purchased Services	$ 13,459	$ 16,374	$ 20,701	$ 19,739	$ 21,231	$ 19,404
Supplies and Materials	$ 30,436	$ 32,892	$ 32,327	$ 18,913	$ 13,660	$ 32,938
Capital						
Other Objects	$ 435	$ 1,599	$ 1,495		$ 624	$ 588
Total	**$ 4,798,992**	**$ 4,678,426**	**$ 5,557,078**	**$ 5,656,674**	**$ 5,810,851**	**$ 5,292,121**
Dollars per Student	**$ 9,282 :1**	**$ 8,430 :1**	**$ 9,614 :1**	**$ 10,047 :1**	**$ 10,741 :1**	**$ 10,276 :1**

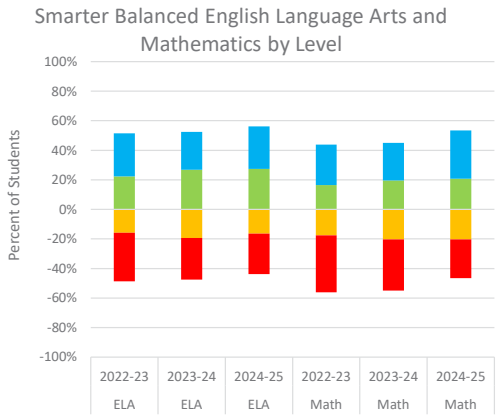
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	31%	36%	34%	36%	38%
*Students with Disabilities	12%	13%	13%	14%	11%
*English Language Learners	5%	5%	4%	4%	4%
*Free-Direct Certification	23%	26%	32%	30%	27%
Black	14%	14%	16%	16%	14%
Latino	14%	14%	13%	12%	12%
Native American		1%	1%	1%	1%
Pacific Islander	0%	0%	0%		
Multi-Race - Other Ancestry	9%	10%	12%	12%	12%
Multi-Race - Asian/White	3%	3%	4%	4%	5%
Asian	1%	1%	1%	1%	1%
White	59%	56%	54%	55%	55%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	29%	26%	29%
ELA	Level 3	22%	27%	28%
ELA	Level 2	16%	19%	16%
ELA	Level 1	33%	28%	28%
	ELA Participation	93%	94%	94%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	28%	26%	33%
Math	Level 3	16%	20%	21%
Math	Level 2	18%	20%	20%
Math	Level 1	39%	35%	26%
	Math Participation	94%	95%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Vestal

161 NE 82nd Ave
503-916-6437

Title I School for 2026-27

K-5 Constructed 1929

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	207	232	228	257	283	290	308	305
Total	**207**	**232**	**228**	**257**	**283**	**290**	**308**	**305**

Shared site with ACCESS 1-5 2018-19 to 2021-22 SY.

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.00	14.00	14.00	12.80	13.70	13.70
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	1.00	1.00	0.50		1.00
		Instructional Spec/ Coach/ Intervention	1.00	1.00	1.00	2.00	1.60	1.50
		Other	2.00	1.50	2.00	1.80	2.00	2.00
	Classified /Non-Rep	Clerical	1.50	1.50	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	4.73	5.50	5.13	2.25	1.75	2.15
		Library/Media Services						
		Other			1.00	1.00	1.00	0.80
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**25.73**	**26.50**	**27.63**	**23.85**	**23.55**	**24.65**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.20	4.00	3.00	3.00	3.00
		ESL	0.50	0.50	0.75	1.00	1.50	1.00
		Other						
	Classified /Non-Rep	Special Education	7.50	8.44	10.32	8.44	7.50	7.50
		ESL						
		Nutrition Services	2.31	1.63	1.63	1.63	1.63	1.63
		Custodial	3.00	4.00	4.00	3.00	3.00	3.00
		Other						
CASR Total			**16.32**	**18.77**	**20.69**	**17.07**	**16.63**	**16.13**
Grand Total			**42.05**	**45.27**	**48.32**	**40.92**	**40.18**	**40.78**
Overall Students per FTE			4.9:1	5.1:1	4.7:1	6.3:1	7.0:1	7.1:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	12.60	14.25	13.45	13.30	13.90	14.60
		Gen Fund Equity	1.30	1.75	1.55	0.50	1.00	1.00
		Gen Fund K-5 Arts	0.50	0.50	0.50	1.00	0.80	0.80
		Foundation						
		Title I	0.20			0.30	0.10	0.30
		SIA/M98	1.90	2.00	3.50	2.50	2.00	2.25
		Other	2.00			0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.40	1.50	1.50	1.50	1.70	1.90
		Gen Fund Equity	1.40	0.50	0.88			
		Foundation						
		Title I	2.43	2.78	2.75	1.38	0.80	0.80
		SIA/M98			1.00	1.75	1.75	1.75
		Other	1.00	2.23	1.50	0.12		
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**25.73**	**26.50**	**27.63**	**23.85**	**23.55**	**24.65**

School and CASR	**Licensed**	22.00	23.20	23.75	22.10	22.80	23.20
	Classified/ Non-Rep	19.05	21.07	23.57	17.82	16.38	16.58
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Vestal

161 NE 82nd Ave
503-916-6437

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,760,569	$1,953,456	$2,123,034	$2,097,113	$2,132,056	$2,174,420
Associated Payroll Costs	$ 872,615	$ 912,644	$1,038,275	$1,019,879	$1,222,577	$1,291,011
Purchased Services	$ 47,244	$ 17,343	$ 20,292	$ 21,034	$ 11,628	$ 12,492
Supplies and Materials	$ 51,328	$ 48,735	$ 38,037	$ 52,996	$ 66,719	$ 13,904
Capital						
Other Objects		$ 304			$ 348	$ 372
Total	**$ 2,731,757**	**$ 2,932,482**	**$ 3,219,638**	**$ 3,191,023**	**$ 3,433,328**	**$ 3,492,199**
Dollars per Student	**$ 13,197 :1**	**$ 12,640 :1**	**$ 14,121 :1**	**$ 12,416 :1**	**$ 12,132 :1**	**$ 12,042 :1**

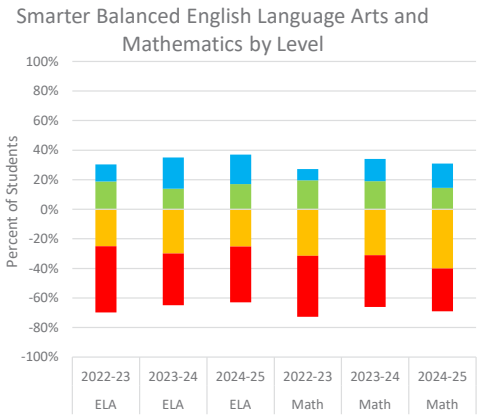
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	34%	37%	39%	47%	58%
*Students with Disabilities	20%	24%	20%	26%	24%
*English Language Learners	10%	12%	11%	15%	19%
*Free-Direct Certification	44%	41%	45%	44%	43%
Black	12%	12%	15%	10%	13%
Latino	15%	16%	19%	20%	19%
Native American	1%	0%	2%	1%	
Pacific Islander	2%	2%	1%	1%	2%
Multi-Race - Other Ancestry	15%	15%	12%	11%	12%
Multi-Race - Asian/White	1%	3%	2%	4%	3%
Asian	9%	10%	11%	6%	6%
White	47%	42%	39%	48%	45%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	12%	21%	20%
ELA	Level 3	19%	14%	17%
ELA	Level 2	25%	30%	25%
ELA	Level 1	45%	35%	38%
	ELA Participation	97%	94%	100%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	8%	15%	16%
Math	Level 3	20%	19%	15%
Math	Level 2	32%	31%	40%
Math	Level 1	41%	35%	29%
	Math Participation	93%	94%	100%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

West Sylvan

8111 SW West Slope Dr
503-916-5690

6-8 Constructed 1953

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	599	626	591	553	567	538	556	512
Spanish Immersion	128	133	131	117	116	117	135	132
Total	**727**	**759**	**722**	**670**	**683**	**655**	**691**	**644**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	34.25	32.75	32.25	31.50	29.50	28.90
		Counseling Services	3.00	3.00	3.00	3.00	2.40	2.00
		Library/Media Services	1.00	0.50	0.50	0.50	0.50	0.50
		Instructional Spec/ Coach/ Intervention		0.50	1.50	2.50	1.40	1.00
		Other		1.00	1.00			
	Classified /Non-Rep	Clerical	1.75	1.75	3.00	3.00	2.90	1.90
		Ed. Assistant/ Paraeducator						0.40
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		3.00	2.00	2.00	2.00	2.00	2.00
School Total			**43.50**	**42.00**	**43.75**	**42.50**	**38.70**	**36.70**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.30	4.10	3.50	3.00	3.00
		ESL	0.50	0.25	0.50	0.50	0.50	0.50
		Other						
	Classified /Non-Rep	Special Education	5.63	6.57	6.57	4.69	5.63	5.63
		ESL						
		Nutrition Services	1.56	1.38	1.38	1.38	1.63	1.63
		Custodial	3.00	5.00	5.00	5.00	4.73	4.73
		Other		1.00	2.00			
CASR Total			**13.69**	**18.49**	**19.54**	**15.07**	**15.48**	**15.48**
Grand Total			**57.19**	**60.49**	**63.29**	**57.57**	**54.18**	**52.18**
Overall Students per FTE			12.7:1	12.5:1	11.4:1	11.6:1	12.6:1	12.6:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	36.00	34.75	36.35	35.50	32.90	30.50
		Gen Fund Equity						
		Gen Fund K-5 Arts						
		Foundation	0.25	0.50	0.30			
		Title I						
		SIA/M98	2.00	1.50	1.00	2.00	0.90	1.90
		Other		1.00	0.60			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	3.50	2.00	1.90	2.30
		Gen Fund Equity						
		Foundation	0.25	0.25				
		Title I						
		SIA/M98				1.00	1.00	
		Other						
	Admin.	Gen Fund	3.00	2.00	2.00	2.00	2.00	2.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**43.50**	**42.00**	**43.75**	**42.50**	**38.70**	**36.70**

School and CASR	**Licensed**	41.75	42.30	42.85	41.50	37.30	35.90
	Classified/ Non-Rep	12.44	16.19	18.44	14.07	14.88	14.28
	Admin.	3.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

West Sylvan

8111 SW West Slope Dr
503-916-5690

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$3,559,421	$3,603,944	$3,946,715	$4,105,026	$3,890,177	$3,759,847
Associated Payroll Costs	$1,721,282	$1,708,526	$1,881,032	$1,976,568	$2,113,265	$2,150,806
Purchased Services	$ 21,732	$ 22,933	$ 44,472	$ 34,423	$ 24,360	$ 23,772
Supplies and Materials	$ 96,881	$ 127,376	$ 105,959	$ 132,150	$ 24,288	$ 33,700
Capital	$ 899					
Other Objects					$ 732	$ 720
Total	**$ 5,400,215**	**$ 5,462,780**	**$ 5,978,178**	**$ 6,248,167**	**$ 6,052,822**	**$ 5,968,845**
Dollars per Student	**$ 7,428 :1**	**$ 7,197 :1**	**$ 8,280 :1**	**$ 9,326 :1**	**$ 8,862 :1**	**$ 9,113 :1**

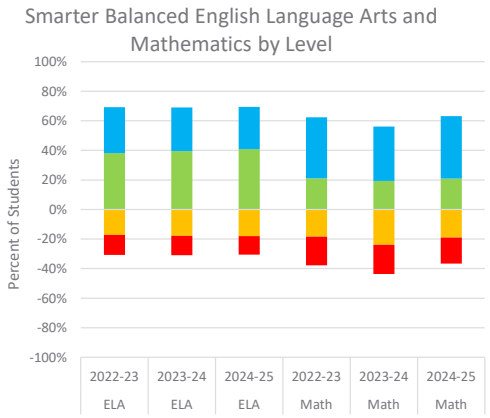
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	13%	14%	18%	20%	26%
*Students with Disabilities	10%	11%	10%	11%	12%
*English Language Learners	2%	2%	3%	4%	5%
*Free-Direct Certification	9%	9%	14%	15%	16%
Black	4%	3%	3%	4%	5%
Latino	11%	12%	14%	12%	13%
Native American	1%	1%	0%	0%	1%
Pacific Islander	0%		0%	0%	0%
Multi-Race - Other Ancestry	5%	5%	5%	5%	6%
Multi-Race - Asian/White	9%	8%	8%	9%	9%
Asian	9%	10%	10%	10%	8%
White	62%	62%	59%	60%	58%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	31%	30%	29%
ELA	Level 3	38%	40%	41%
ELA	Level 2	17%	18%	18%
ELA	Level 1	14%	13%	12%
	ELA Participation	96%	96%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	41%	37%	42%
Math	Level 3	21%	19%	21%
Math	Level 2	18%	24%	19%
Math	Level 1	19%	20%	18%
	Math Participation	94%	96%	95%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Whitman

7326 SE Flavel St
503-916-6370

Title I School for 2026-27

K-5 Constructed 1954

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	152	153	180	198	194	199	208	218
Total	**152**	**153**	**180**	**198**	**194**	**199**	**208**	**218**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	12.00	10.25	9.05	11.60	10.50	11.40
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	1.00	1.00	1.00	0.40	0.40	0.40
		Instructional Spec/ Coach/ Intervention	1.00	1.25	2.00	2.00	2.00	1.90
		Other	0.50	2.00	2.00	1.40	1.40	1.40
	Classified /Non-Rep	Clerical	2.00	2.00	2.00	2.00	2.00	1.50
		Ed. Assistant/ Paraeducator	2.19	1.75	2.63	1.75	0.88	1.20
		Library/Media Services						
		Other						
	Admin.		2.00	1.00	1.00	1.00	1.00	1.00
School Total			**21.69**	**20.25**	**20.68**	**21.15**	**19.18**	**19.80**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.40	1.60	2.00	2.50	3.00
		ESL	1.00	0.50	0.75	1.00	1.00	1.00
		Other				3.00	3.00	3.00
	Classified /Non-Rep	Special Education	0.94	0.94	1.88	4.69	6.57	4.69
		ESL	0.44					
		Nutrition Services	1.63	1.69	1.94	1.63	1.63	1.63
		Custodial	2.00	2.00	2.00	2.00	2.00	2.00
		Other				5.13	5.13	5.13
CASR Total			**7.00**	**6.53**	**8.16**	**19.44**	**21.82**	**20.44**
Grand Total			**28.69**	**26.78**	**28.84**	**40.59**	**40.99**	**40.24**
Overall Students per FTE			5.3:1	5.7:1	6.2:1	4.9:1	4.7:1	4.9:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	12.65	9.05	10.05	11.00	11.00	11.00
		Gen Fund Equity	0.45	1.35	1.50	1.00	1.00	1.00
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.80	0.80	0.80
		Foundation						
		Title I		0.10	0.60	0.60		0.80
		SIA/M98	0.90	1.50	1.50	2.50	2.00	2.25
		Other	1.00	3.00	0.90	0.50	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.50	1.50	2.38	1.50	1.50	1.90
		Gen Fund Equity	0.69	0.30				
		Foundation						
		Title I	1.00	0.58	1.25	0.50	1.38	0.80
		SIA/M98			1.00	1.75		
		Other	1.00	1.38				
	Admin.	Gen Fund	1.50	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity	0.50					
		Title I						
		Other						
School Total			**21.69**	**20.25**	**20.68**	**21.15**	**19.18**	**19.80**

School and CASR	**Licensed**	17.50	17.40	17.40	22.40	21.80	23.10
	Classified/ Non-Rep	9.19	8.38	10.44	17.19	18.19	16.14
	Admin.	2.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Whitman

7326 SE Flavel St
503-916-6370

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,481,055	$1,539,308	$1,701,828	$1,859,527	$1,719,022	$1,809,794
Associated Payroll Costs	$ 731,647	$ 749,470	$ 847,862	$ 933,368	$ 986,961	$1,083,950
Purchased Services	$ 10,314	$ 29,114	$ 20,730	$ 13,040	$ 9,912	$ 9,743
Supplies and Materials	$ 47,252	$ 39,777	$ 35,889	$ 38,258	$ 63,718	$ 11,552
Capital	$ 620		$ 1,567			
Other Objects			$ 75	$ 309	$ 300	$ 288
Total	**$ 2,270,888**	**$ 2,357,668**	**$ 2,607,950**	**$ 2,844,502**	**$ 2,779,912**	**$ 2,915,327**
Dollars per Student	**$ 14,940 :1**	**$ 15,410 :1**	**$ 14,489 :1**	**$ 14,366 :1**	**$ 14,329 :1**	**$ 14,650 :1**

Note: Foundation funding ended after the 2023-24 school year.

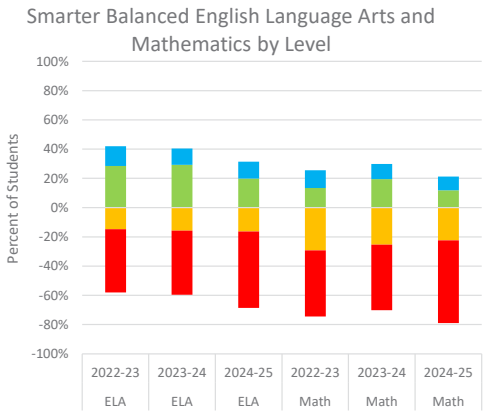
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	47%	55%	58%	62%	75%
*Students with Disabilities	16%	18%	22%	26%	28%
*English Language Learners	23%	15%	18%	21%	18%
*Free-Direct Certification	41%	50%	62%	64%	64%
Black	9%	7%	8%	11%	11%
Latino	30%	29%	28%	27%	24%
Native American	1%	3%	2%	3%	3%
Pacific Islander	1%	3%	3%	5%	3%
Multi-Race - Other Ancestry	7%	15%	11%	11%	10%
Multi-Race - Asian/White	1%	2%	2%	4%	3%
Asian	15%	10%	12%	10%	10%
White	36%	31%	33%	31%	37%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: gaining neighborhood students from Lewis and Woodmere.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	14%	11%	12%
ELA	Level 3	28%	29%	20%
ELA	Level 2	15%	16%	16%
ELA	Level 1	43%	44%	52%
	ELA Participation	98%	100%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	12%	10%	9%
Math	Level 3	13%	20%	12%
Math	Level 2	29%	25%	22%
Math	Level 1	45%	45%	57%
	Math Participation	99%	98%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Winterhaven

3830 SE 14th Ave
503-916-6200

K-8 Constructed 1930

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	292	313	316	322	316	315	311	312
Total	**292**	**313**	**316**	**322**	**316**	**315**	**311**	**312**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	14.50	15.00	15.00	15.60	14.10	15.40
		Counseling Services	1.50	1.50	1.50	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.40	0.40	0.40
		Instructional Spec/ Coach/ Intervention			1.00	1.00	1.00	1.00
		Other						
	Classified /Non-Rep	Clerical	1.00	1.00	2.00	1.00	1.00	1.00
		Ed. Assistant/ Paraeducator	0.50	0.50	1.55	1.01	1.00	
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		1.00	1.00	1.00	1.00	1.00	1.00
School Total			**19.50**	**20.00**	**23.05**	**21.01**	**19.50**	**19.80**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	1.60	1.40	0.50	0.50	0.50
		ESL	0.25	0.25	0.25			
		Other						
	Classified /Non-Rep	Special Education	0.94	0.94	0.94			
		ESL						
		Nutrition Services	0.75	0.75	0.94	1.25	1.25	1.25
		Custodial	2.73	3.73	2.73	3.00	2.00	2.00
		Other	0.88	0.88	0.88			
CASR Total			**6.54**	**8.14**	**7.13**	**4.75**	**3.75**	**3.75**
Grand Total			**26.04**	**28.14**	**30.18**	**25.76**	**23.25**	**23.55**
Overall Students per FTE			11.2:1	11.1:1	10.5:1	12.5:1	13.6:1	13.4:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	15.50	15.50	16.50	16.60	15.10	16.40
		Gen Fund Equity						
		Gen Fund K-5 Arts	0.50	0.50	0.50	0.40	0.40	0.40
		Foundation						
		Title I						
		SIA/M98	0.50	1.00	1.00	1.00	1.00	1.00
		Other						
	Classified/ Non-Rep	Gen Fund	2.00	2.00	3.00	2.01	2.00	1.00
		Gen Fund Equity						
		Foundation						
		Title I						
		SIA/M98						
		Other			1.05			
	Admin.	Gen Fund	1.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**19.50**	**20.00**	**23.05**	**21.01**	**19.50**	**19.80**

School and CASR	**Licensed**	17.75	18.85	19.65	18.50	17.00	18.30
	Classified/ Non-Rep	7.29	8.29	9.53	6.26	5.25	4.25
	Admin.	1.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Winterhaven

3830 SE 14th Ave
503-916-6200

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,610,811	$1,763,400	$2,074,381	$2,141,950	$1,994,253	$2,136,130
Associated Payroll Costs	$ 798,012	$ 853,723	$1,065,589	$1,016,725	$1,064,132	$1,182,856
Purchased Services	$ 3,569	$ 3,877	$ 14,459	$ 3,840	$ 13,404	$ 13,236
Supplies and Materials	$ 33,179	$ 66,438	$ 49,963	$ 45,588	$ 8,756	$ 23,200
Capital		$ 9,500				
Other Objects					$ 408	$ 396
Total	**$ 2,445,571**	**$ 2,696,939**	**$ 3,204,392**	**$ 3,208,103**	**$ 3,080,953**	**$ 3,355,818**
Dollars per Student	**$ 8,375 :1**	**$ 8,616 :1**	**$ 10,140 :1**	**$ 9,963 :1**	**$ 9,750 :1**	**$ 10,653 :1**

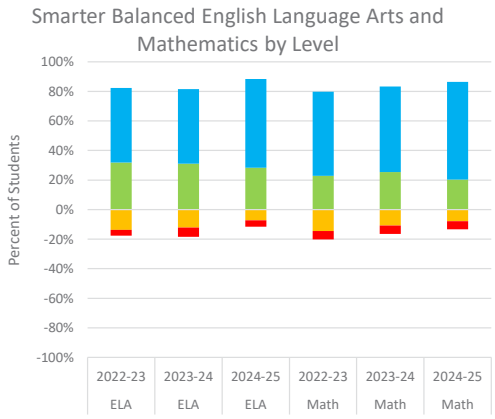
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	12%	14%	15%	17%	24%
*Students with Disabilities	7%	8%	8%	6%	6%
*English Language Learners					
*Free-Direct Certification	7%	10%	14%	15%	18%
Black	1%	2%	2%	2%	1%
Latino	5%	6%	6%	8%	9%
Native American			0%	0%	0%
Pacific Islander					
Multi-Race - Other Ancestry	2%	5%	3%	3%	4%
Multi-Race - Asian/White	8%	9%	9%	10%	10%
Asian	3%	4%	4%	5%	6%
White	81%	75%	76%	72%	70%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	50%	51%	60%
ELA	Level 3	32%	31%	28%
ELA	Level 2	14%	12%	7%
ELA	Level 1	4%	6%	4%
	ELA Participation	98%	97%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	57%	58%	66%
Math	Level 3	23%	25%	20%
Math	Level 2	15%	11%	8%
Math	Level 1	6%	6%	6%
	Math Participation	99%	98%	98%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Woodlawn

7200 NE 11th Ave
503-916-6282

Title I School for 2026-27

K-5 Constructed 1926

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	283	288	299	306	323	320	300	316
Total	**283**	**288**	**299**	**306**	**323**	**320**	**300**	**316**

	Staff Type	Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	16.70	15.50	15.63	15.60	15.35	15.20
		Counseling Services	1.50	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.60
		Instructional Spec/ Coach/ Intervention	2.00	2.00	2.13	3.00	2.00	1.00
		Other		0.50	0.60	1.00	1.00	1.00
	Classified /Non-Rep	Clerical	1.50	1.50	2.80	3.00	3.00	1.50
		Ed. Assistant/ Paraeducator	3.50	3.33	4.38	1.75	1.92	2.15
		Library/Media Services	0.50	0.50				
		Other	1.00	1.00				
	Admin.		2.00	2.00	2.00	2.00	2.00	2.00
School Total			**29.20**	**27.83**	**29.03**	**27.95**	**26.87**	**24.45**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.00	4.40	4.20	3.00	3.00	3.00
		ESL	1.00	1.00	0.75	1.00	1.00	1.00
		Other						
	Classified /Non-Rep	Special Education	8.44	7.50	7.50	8.44	10.32	10.32
		ESL						
		Nutrition Services	2.25	2.25	2.25	1.69	1.69	1.69
		Custodial	2.00	3.00	3.00	3.00	3.00	3.00
		Other						
CASR Total			**16.69**	**18.15**	**17.70**	**17.13**	**19.01**	**19.01**
Grand Total			**45.90**	**45.98**	**46.73**	**45.08**	**45.87**	**43.46**
Overall Students per FTE			6.2:1	6.3:1	6.4:1	6.8:1	7.0:1	7.4:1

(Total Enrollment divided by Grand Total FTE)

	Staff Type	Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	17.00	15.50	14.70	16.40	16.10	15.20
		Gen Fund Equity	1.00	1.00	1.25	0.90		
		Gen Fund K-5 Arts	0.50	1.00	0.50	0.80	0.80	1.20
		Foundation						
		Title I			0.30		0.05	0.40
		SIA/M98	2.20	2.00	3.00	2.50	2.50	1.75
		Other			0.10	0.60	0.50	0.25
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.38	1.50	1.50	1.90
		Gen Fund Equity	0.80	0.30	0.10	0.10	0.30	
		Foundation						
		Title I	2.20	1.71	2.20	1.40	1.11	
		SIA/M98			1.00	1.75	1.75	1.75
		Other	1.50	2.32	1.50		0.25	
	Admin.	Gen Fund	1.50	1.50	1.50	2.00	1.50	1.30
		Gen Fund Equity	0.50	0.50	0.50		0.50	0.70
		Title I						
		Other						
School Total			**29.20**	**27.83**	**29.03**	**27.95**	**26.87**	**24.45**

School and CASR	**Licensed**	24.70	24.90	24.80	25.20	23.95	22.80
	Classified/ Non-Rep	19.20	19.08	19.93	17.88	19.92	18.66
	Admin.	2.00	2.00	2.00	2.00	2.00	2.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Woodlawn

7200 NE 11th Ave
503-916-6282

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,189,096	$2,206,398	$2,434,058	$2,421,717	$2,499,338	$2,340,715
Associated Payroll Costs	$1,133,229	$1,030,327	$1,224,880	$1,196,710	$1,401,804	$1,360,687
Purchased Services	$ 13,613	$ 10,457	$ 17,578	$ 11,433	$ 41,133	$ 13,428
Supplies and Materials	$ 94,116	$ 82,054	$ 90,147	$ 79,179	$ 73,557	$ 42,595
Capital		$ 1,975				
Other Objects					$ 384	$ 408
Total	**$ 3,430,054**	**$ 3,331,211**	**$ 3,766,664**	**$ 3,709,038**	**$ 4,016,216**	**$ 3,757,833**
Dollars per Student	**$ 12,120 :1**	**$ 11,567 :1**	**$ 12,598 :1**	**$ 12,121 :1**	**$ 12,434 :1**	**$ 11,743 :1**

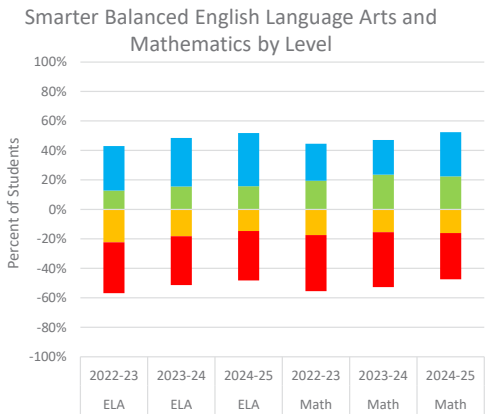
Note: Foundation funding ended after the 2023-24 school year.

Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	40%	45%	51%	56%	58%
*Students with Disabilities	24%	23%	27%	26%	25%
*English Language Learners	10%	11%	9%	10%	8%
*Free-Direct Certification	31%	37%	48%	49%	44%
Black	27%	25%	26%	26%	26%
Latino	19%	19%	19%	23%	23%
Native American				0%	1%
Pacific Islander	1%	1%	0%	0%	
Multi-Race - Other Ancestry	10%	14%	15%	12%	10%
Multi-Race - Asian/White	4%	3%	2%	2%	2%
Asian	1%	1%		1%	1%
White	38%	36%	38%	36%	38%

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	30%	33%	36%
ELA	Level 3	13%	16%	16%
ELA	Level 2	22%	18%	15%
ELA	Level 1	35%	33%	34%
	ELA Participation	99%	97%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	25%	24%	30%
Math	Level 3	19%	24%	22%
Math	Level 2	17%	16%	16%
Math	Level 1	38%	37%	31%
	Math Participation	99%	97%	97%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Woodmere

7900 SE Duke St
503-916-6373

Title I School for 2026-27

K-5 Constructed 1954

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	253	235	248	242	227	223	225	225
Total	**253**	**235**	**248**	**242**	**227**	**223**	**225**	**225**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	13.80	14.00	14.00	13.70	13.10	11.60
		Counseling Services	1.00	1.00	1.00	1.00	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.60	0.60	0.40
		Instructional Spec/ Coach/ Intervention	1.00	1.50	2.50	2.50	2.00	1.50
		Other	1.50	1.50	2.00	2.00	2.00	2.00
	Classified /Non-Rep	Clerical	2.00	2.00	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator	3.70	3.69	2.00	1.75	0.06	0.40
		Library/Media Services	0.50	0.50	0.50			
		Other			1.00	1.00	1.00	1.00
	Admin.		2.00	2.00	2.00	2.00	1.00	1.00
School Total			**26.00**	**26.69**	**27.00**	**26.05**	**22.26**	**20.40**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	3.50	4.50	4.50	4.50	3.50	3.00
		ESL	1.50	1.50	1.50	1.50	1.50	1.50
		Other						
	Classified /Non-Rep	Special Education	9.38	5.63	7.50	8.44	7.50	7.50
		ESL	0.44	0.44	0.44	0.44	0.44	
		Nutrition Services	2.25	2.25	2.25	1.63	1.63	1.63
		Custodial	2.73	3.00	3.00	3.00	2.00	2.00
		Other	1.00	1.00				
CASR Total			**20.79**	**18.32**	**19.19**	**19.51**	**16.57**	**15.63**
Grand Total			**46.79**	**45.01**	**46.20**	**45.56**	**38.83**	**36.03**
Overall Students per FTE			5.4:1	5.2:1	5.4:1	5.3:1	5.8:1	6.2:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	13.80	13.50	14.50	14.40	13.90	12.20
		Gen Fund Equity	1.30	1.00	1.80	1.00	1.00	0.80
		Gen Fund K-5 Arts	0.80	0.50	0.50	0.90	0.80	0.80
		Foundation						
		Title I		0.50	0.20	0.24		0.20
		SIA/M98	1.90	3.00	2.50	2.50	2.50	2.25
		Other			0.50	0.76	0.50	0.25
	Classified/ Non-Rep	Gen Fund	1.40	2.00	2.00	1.50	1.90	1.90
		Gen Fund Equity	1.00	0.60				0.40
		Foundation	0.16					
		Title I	2.13	1.65	1.75	1.00	0.66	0.60
		SIA/M98			1.00	1.75		
		Other	1.50	1.94	0.25			
	Admin.	Gen Fund	1.50	1.50	1.50	2.00	1.00	1.00
		Gen Fund Equity	0.50	0.50	0.50			
		Title I						
		Other						
School Total			**26.00**	**26.69**	**27.00**	**26.05**	**22.26**	**20.40**

School and CASR	**Licensed**	22.80	24.50	26.00	25.80	23.70	21.00
	Classified/ Non-Rep	21.99	18.51	18.20	17.76	14.13	14.03
	Admin.	2.00	2.00	2.00	2.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Woodmere

7900 SE Duke St
503-916-6373

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$1,994,052	$2,121,095	$2,423,724	$2,513,287	$2,189,232	$2,087,789
Associated Payroll Costs	$ 920,643	$1,028,971	$1,157,937	$1,166,527	$1,198,016	$1,180,764
Purchased Services	$ 31,064	$ 25,480	$ 23,461	$ 9,993	$ 27,726	$ 10,332
Supplies and Materials	$ 63,397	$ 65,310	$ 62,812	$ 64,887	$ 65,981	$ 10,845
Capital	$ 2,673	$ 1,082		$ 20		
Other Objects		$ 350		$ 85	$ 336	$ 312
Total	**$ 3,011,829**	**$ 3,242,289**	**$ 3,667,934**	**$ 3,754,799**	**$ 3,481,291**	**$ 3,290,042**
Dollars per Student	**$ 11,904 :1**	**$ 13,797 :1**	**$ 14,790 :1**	**$ 15,516 :1**	**$ 15,336 :1**	**$ 14,754 :1**

Note: Foundation funding ended after the 2023-24 school year.

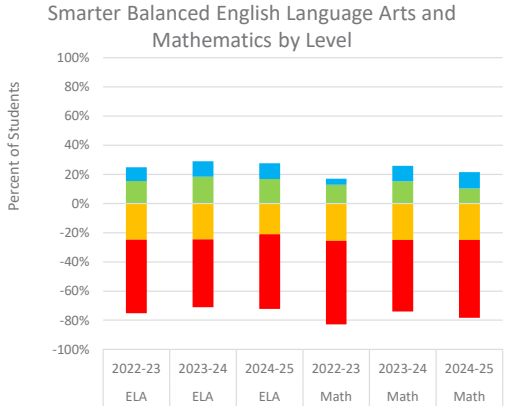
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	35%	40%	45%	60%	75%
*Students with Disabilities	23%	24%	28%	32%	30%
*English Language Learners	21%	22%	24%	23%	25%
*Free-Direct Certification	45%	51%	61%	62%	59%
Black	12%	10%	11%	10%	10%
Latino	19%	23%	22%	25%	25%
Native American	0%	0%	0%	0%	1%
Pacific Islander	2%	2%	2%	1%	0%
Multi-Race - Other Ancestry	10%	8%	8%	14%	15%
Multi-Race - Asian/White	2%	0%	2%	3%	2%
Asian	16%	12%	13%	13%	12%
White	40%	44%	42%	35%	34%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: gaining neighborhood students from Arleta, Marysville, and Woodstock. Losing neighborhood students to Whitman.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	9%	11%	11%
ELA	Level 3	15%	18%	17%
ELA	Level 2	25%	25%	21%
ELA	Level 1	50%	47%	51%
	ELA Participation	97%	98%	98%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	4%	11%	11%
Math	Level 3	13%	15%	10%
Math	Level 2	26%	25%	25%
Math	Level 1	57%	49%	53%
	Math Participation	99%	97%	96%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.

Woodstock

5601 SE 50th Ave
503-916-6380

K-5 Constructed 1910

Enrollment Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Projected	2027-28 Projected	2028-29 Projected
Neighborhood	224	242	214	188	177	163	150	144
Mandarin Immersion	255	249	237	206	190	190	193	200
Total	**479**	**491**	**451**	**394**	**367**	**353**	**343**	**344**

Staff Type		Position	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Position	**Licensed**	Teachers	26.10	27.10	26.60	24.00	18.20	17.20
		Counseling Services	2.00	1.50	1.50	1.20	1.00	1.00
		Library/Media Services	0.50	0.50	0.50	0.80	0.60	0.60
		Instructional Spec/ Coach/ Intervention	1.00		1.50	1.50	1.50	2.00
		Other						
	Classified /Non-Rep	Clerical	1.90	2.00	1.50	1.50	1.50	1.50
		Ed. Assistant/ Paraeducator			2.00	1.50	1.40	0.80
		Library/Media Services	0.50	0.50	0.50			
		Other						
	Admin.		2.00	1.00	1.00	1.00	1.00	1.00
School Total			**34.00**	**32.60**	**35.10**	**31.50**	**25.20**	**24.10**
Centrally Allocated School Resources (CASR)	**Licensed**	Special Education	1.00	2.00	2.00	1.00	2.00	2.00
		ESL	1.00	2.00	1.50	1.50	1.50	1.00
		Other						
	Classified /Non-Rep	Special Education	0.94				2.81	2.81
		ESL	0.44	0.44	0.44	0.44		
		Nutrition Services	2.50	1.44	1.44	1.44	1.44	1.44
		Custodial	3.00	3.00	3.00	3.00	3.00	3.00
		Other	0.50	0.50				
CASR Total			**9.38**	**9.38**	**8.38**	**7.38**	**10.75**	**10.25**
Grand Total			**43.38**	**41.98**	**43.48**	**38.88**	**35.95**	**34.35**
Overall Students per FTE			11.0:1	11.7:1	10.4:1	10.1:1	10.2:1	10.3:1

(Total Enrollment divided by Grand Total FTE)

Staff Type		Funding Source	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Actual	2026-27 Budget
School Allocated FTE by Funding Source (not CASR)	**Licensed**	Gen Fund	27.60	27.10	27.10	24.40	18.60	17.60
		Gen Fund Equity						0.30
		Gen Fund K-5 Arts	1.50	1.50	1.00	1.60	1.20	1.20
		Foundation						
		Title I						
		SIA/M98	0.50	0.50	1.50	1.50	1.50	1.70
		Other			0.50			
	Classified/ Non-Rep	Gen Fund	2.00	2.00	2.00	2.00	1.90	1.90
		Gen Fund Equity			2.00	1.00	1.00	0.40
		Foundation	0.40					
		Title I						
		SIA/M98						
		Other		0.50				
	Admin.	Gen Fund	2.00	1.00	1.00	1.00	1.00	1.00
		Gen Fund Equity						
		Title I						
		Other						
School Total			**34.00**	**32.60**	**35.10**	**31.50**	**25.20**	**24.10**

School and CASR	**Licensed**	31.60	33.10	33.60	30.00	24.80	23.80
	Classified/ Non-Rep	9.78	7.88	8.88	7.88	10.15	9.55
	Admin.	2.00	1.00	1.00	1.00	1.00	1.00

FTE and students per FTE shown on this report may not match other reports. This report has additional staff, which are Centrally Allocated School Resources (CASR FTE) such as Nutrition Service and Custodians. Unlike other reports in this budget document, all FTE displayed on this report as 1.00 FTE is equal to 40 hours per week for one position.

Woodstock

5601 SE 50th Ave
503-916-6380

Financial expenditure/requirements for General Fund, Equity, Foundation, Title-I and other Grants and Special Revenue

School Financial Data	2021-22 Actual	2022-23 Actual	2023-24 Actual	2024-25 Actual	2025-26 Estimated	2026-27 Budget
Salaries	$2,840,061	$2,859,502	$3,184,155	$3,056,827	$2,600,603	$2,588,666
Associated Payroll Costs	$1,400,039	$1,391,267	$1,531,127	$1,477,763	$1,391,280	$1,438,829
Purchased Services	$ 7,437	$ 7,241	$ 8,079	$ 21,024	$ 14,592	$ 14,388
Supplies and Materials	$ 29,563	$ 40,588	$ 48,143	$ 29,589	$ 14,532	$ 14,352
Capital						
Other Objects			$ 50		$ 444	$ 432
Total	**$4,277,100**	**$4,298,598**	**$4,771,555**	**$4,585,204**	**$4,021,451**	**$4,056,667**
Dollars per Student	**$ 8,929 :1**	**$ 8,755 :1**	**$10,580 :1**	**$11,638 :1**	**$10,958 :1**	**$11,492 :1**

Note: Foundation funding ended after the 2023-24 school year.

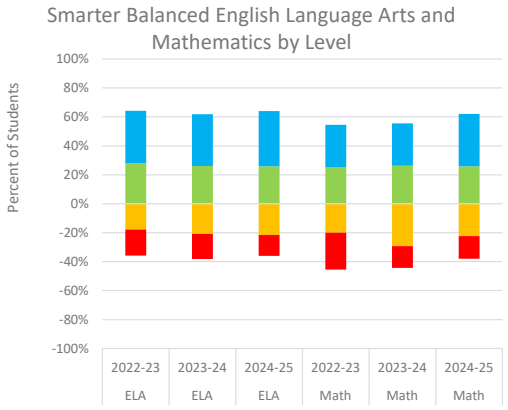
Demographic Data	2021-22	2022-23	2023-24	2024-25	2025-26
Federally Qualified Underserved*	21%	24%	27%	32%	38%
*Students with Disabilities	10%	13%	12%	13%	15%
*English Language Learners	16%	16%	15%	12%	11%
*Free-Direct Certification	13%	13%	23%	22%	23%
Black	0%	1%	1%	1%	3%
Latino	4%	8%	8%	9%	9%
Native American					
Pacific Islander	0%	0%	1%	1%	
Multi-Race - Other Ancestry	3%	3%	3%	3%	4%
Multi-Race - Asian/White	16%	16%	17%	17%	15%
Asian	24%	23%	23%	23%	23%
White	52%	49%	47%	46%	46%

Note: historical data is not directly comparable to 2023-24 data due to SEGC impact: Losing neighborhood students to Woodmere. Gaining neighborhood students from Arleta.

Oregon State Assessment System Data

Subject	ELA	2022-23	2023-24	2024-25
ELA	Level 4	36%	36%	38%
ELA	Level 3	28%	26%	26%
ELA	Level 2	18%	21%	22%
ELA	Level 1	18%	17%	15%
	ELA Participation	97%	98%	99%

Subject	Math	2022-23	2023-24	2024-25
Math	Level 4	29%	29%	36%
Math	Level 3	25%	26%	26%
Math	Level 2	20%	29%	22%
Math	Level 1	26%	15%	16%
	Math Participation	97%	98%	99%



Note on how to read the graph: 0% represents the base level of proficiency to be on track for college or career readiness. The green and blue bars represent the percent of students who are proficient.

Because of low participation and a high number of student opt-outs, grade 11 OSAS data should be interpreted with caution.


PPS

Bond Program Update



PORTLAND
Public Schools

May 26, 2026

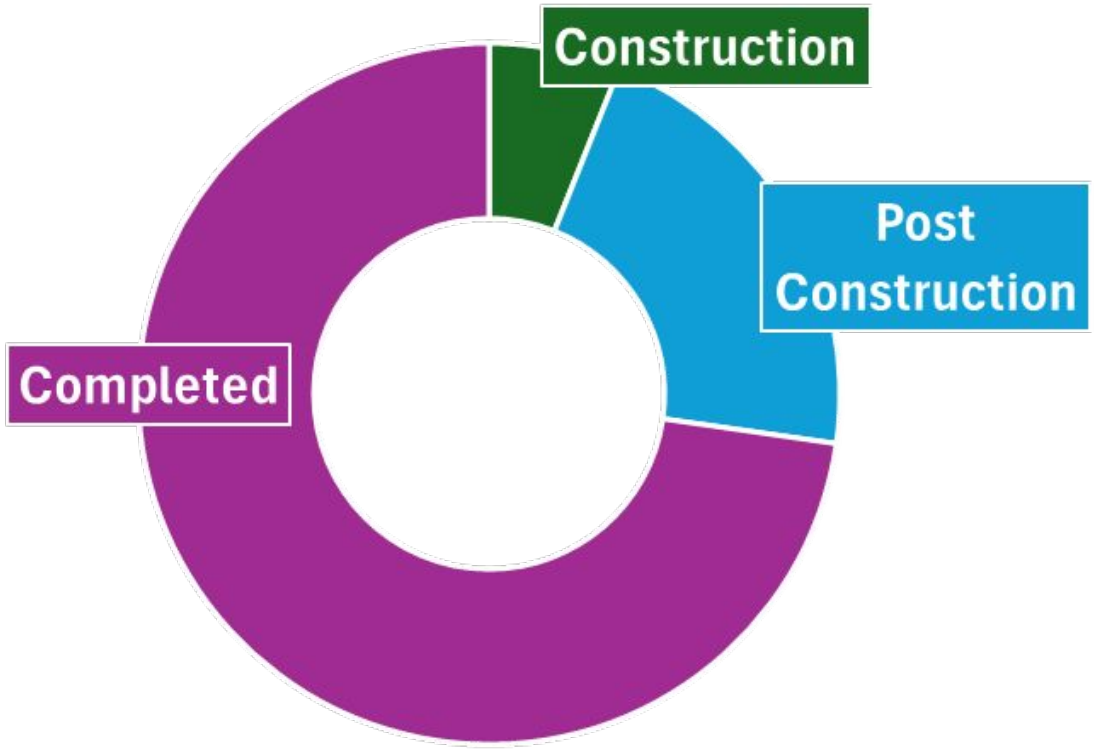
Agenda

- Program Status Update
- Schedule Update
- Program Budget Update
- Project Updates

Program Status Update

2012 Bond Program Project Status

Total Projects	Pre-Planning	Design Phase	Construction	Post Construction	Completed
33	0	0	2	7	24

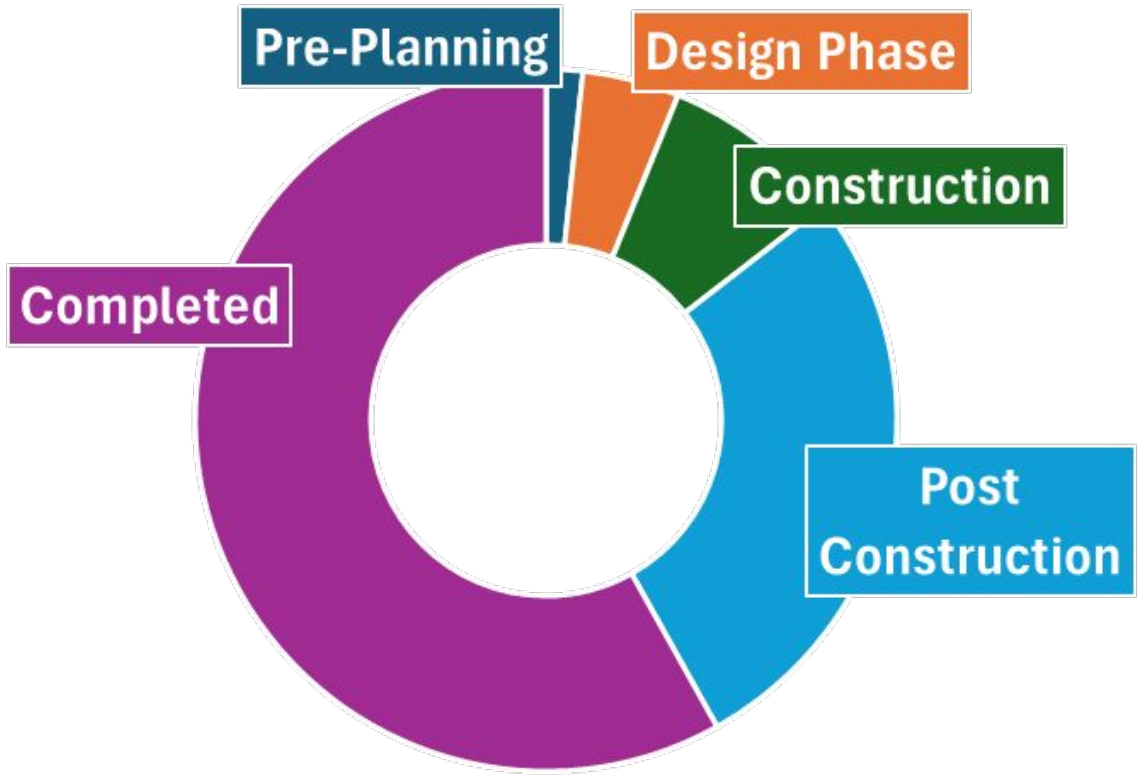


NOTE: source data: Ebuilder reports by bond measure, sorted by project status.

Audit of Project Completion and Closeout statuses is currently ongoing.

2017 Bond Program Project Status

Total Projects	Pre-Planning	Design Phase	Construction	Post Construction	Completed
179	3	7	15	50	104

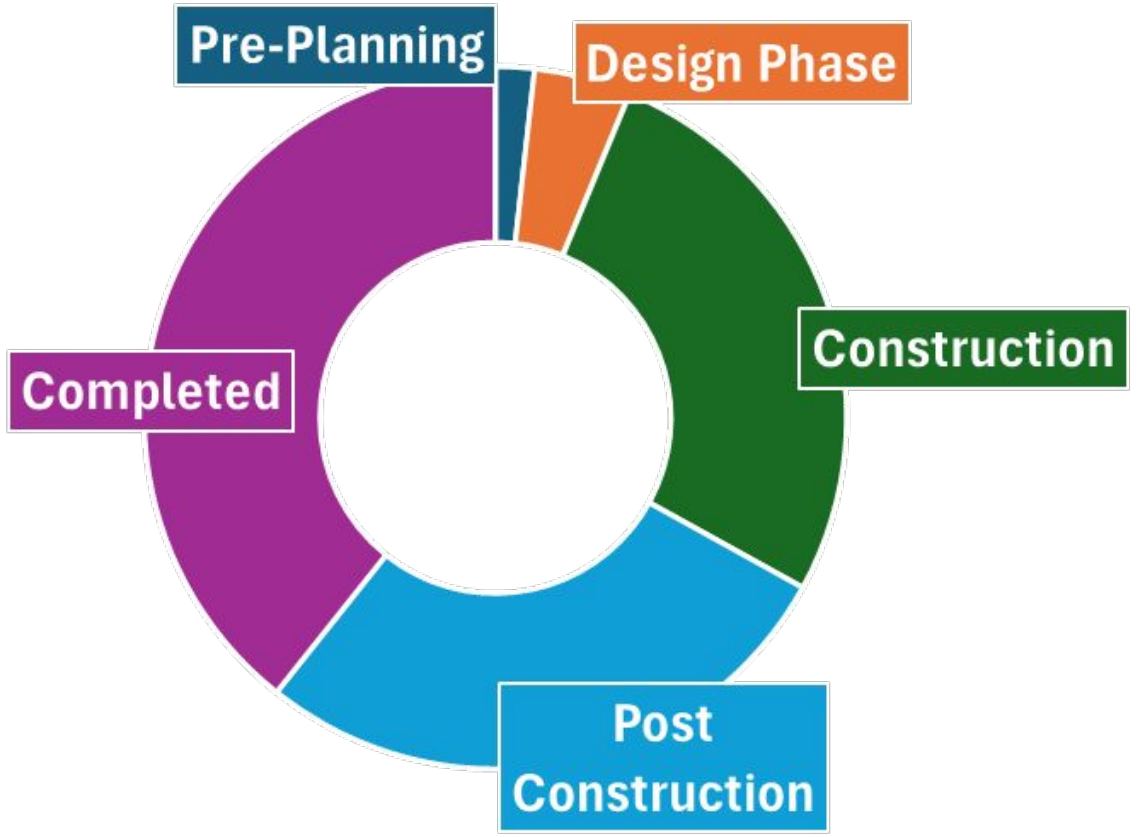


NOTE: source data: Ebuilder reports by bond measure, sorted by project status.

Audit of Project Completion and Closeout statuses is currently ongoing.

2020 Bond Program Project Status

Total Projects	Pre-Planning	Design Phase	Construction	Post Construction	Completed
112*	2	5	30	31	44



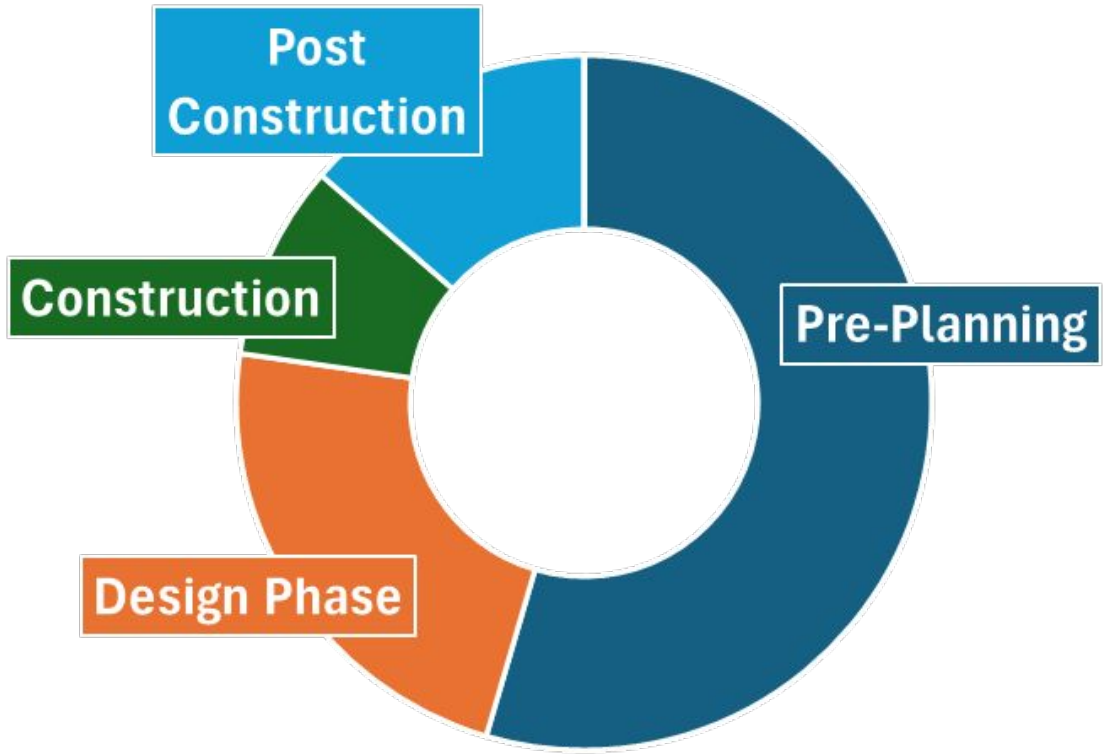
**Approximately $512 M remaining to be scheduled for 2020 Bond.*

NOTE: source data: Ebuilder reports by bond measure, sorted by project status.

Audit of Project Completion and Closeout statuses is currently ongoing.

2025 Bond Program Project Status

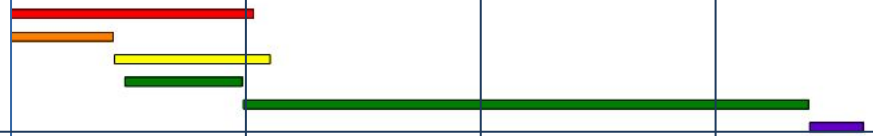
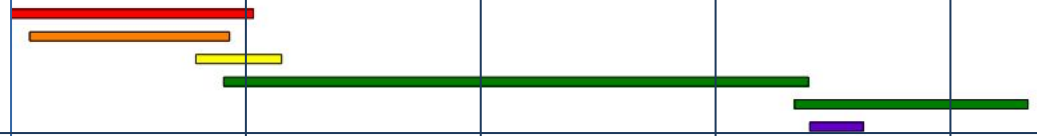
Total Projects	Pre-Planning	Design Phase	Construction	Post Construction	Completed
22*	12	5	2	3	0



** Total projects will increase as the program progresses.*

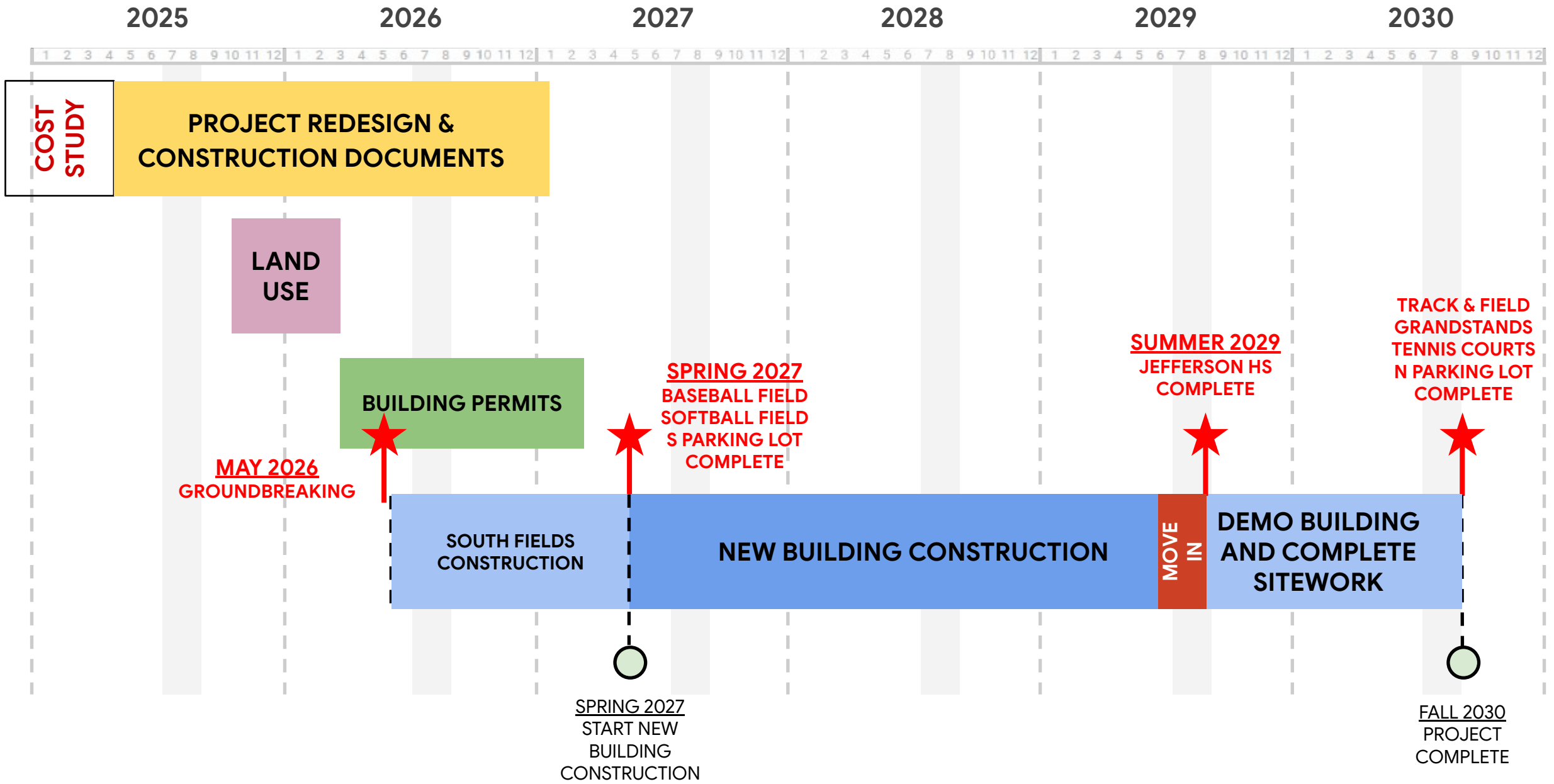
Schedule and Budget Update

Program Schedule Update

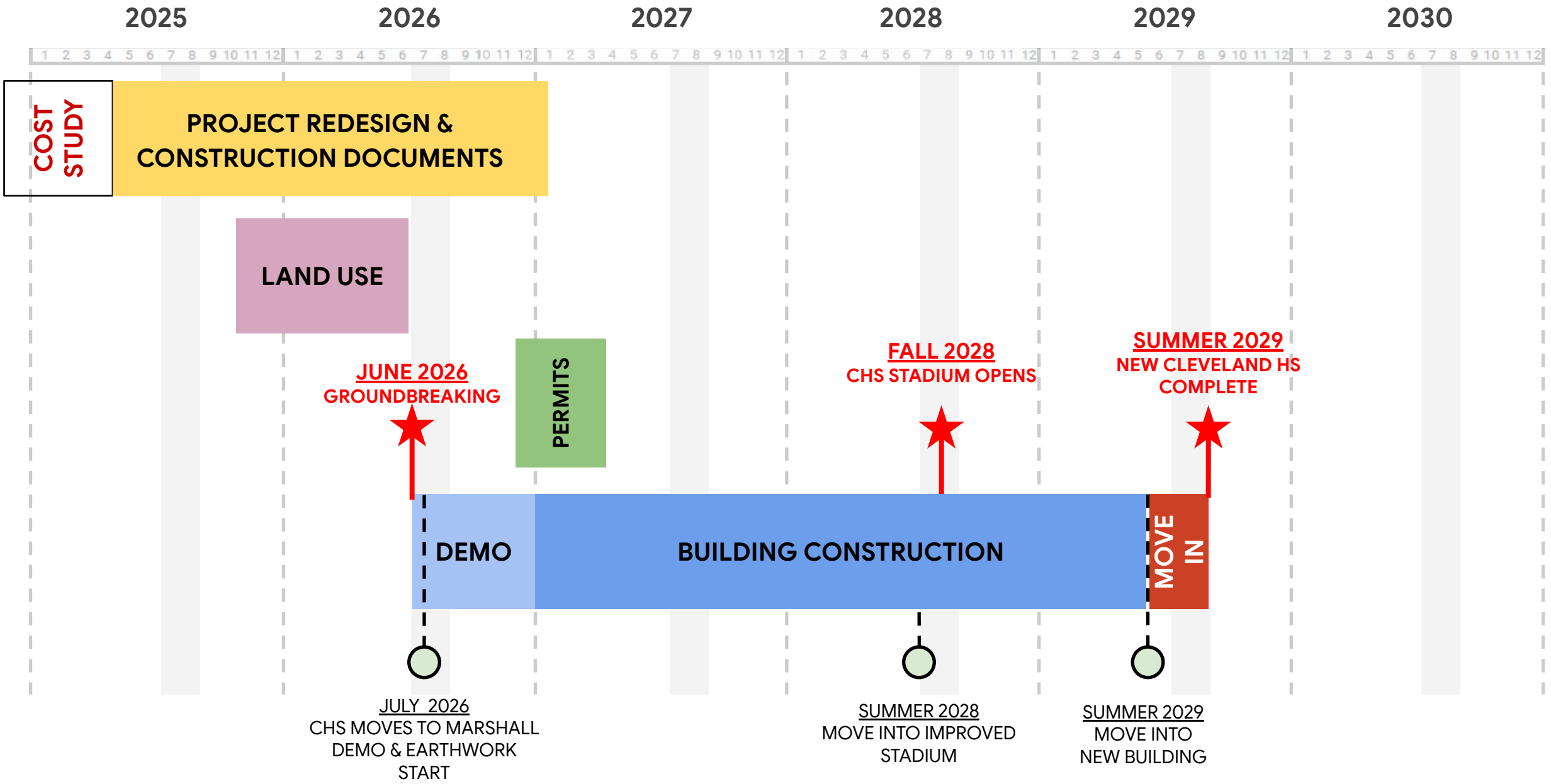
Program Schedule May 2026		2026	2027	2028	2029	2030
1	Jefferson High School					
2	Cleveland High School					
3	Ida B. Wells High School					
4	Grice-Adair Center for Educational Excellence					
All future dates, durations and projections are subject to change						

Design Phase	Procurement	Land Use	Permitting	Construction Phase	Closeout

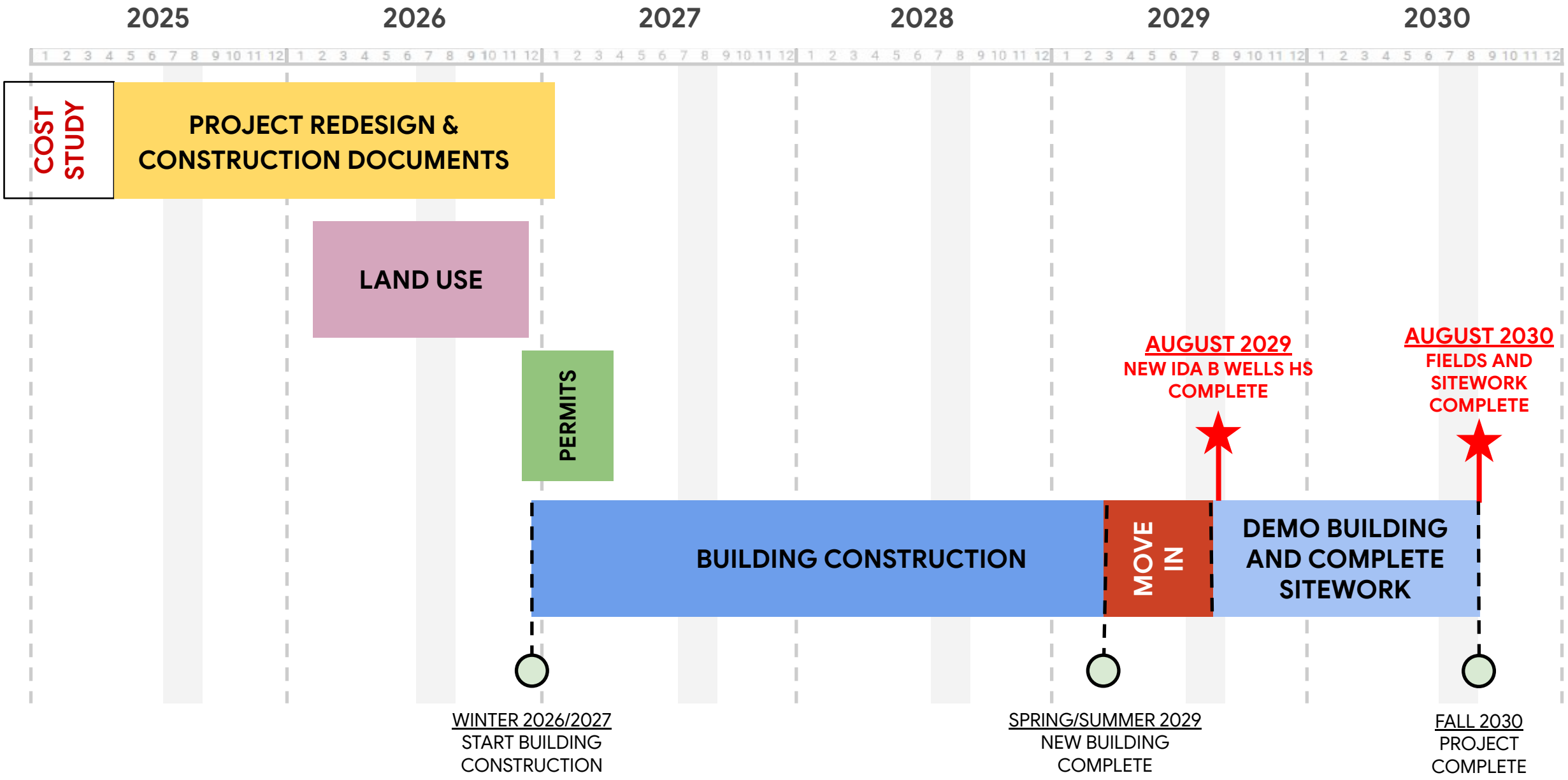
JHS Overall Project Schedule



CHS Overall Project Schedule



IBW Overall Project Schedule



PORTLAND PUBLIC SCHOOLS

Bond Program Dashboard

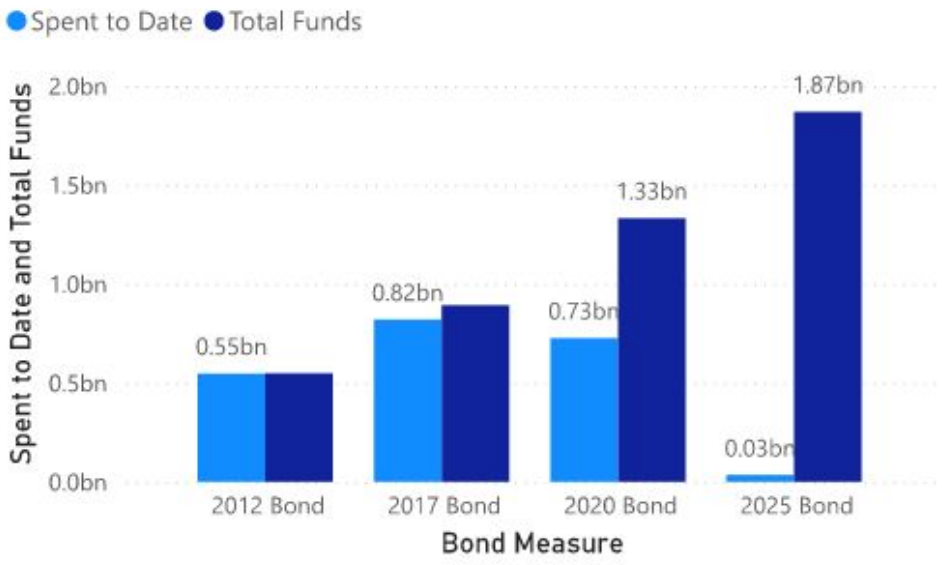
Data Source	Report Name	Date Export
eBuilder	0-PIVOT TABLE - FUNDING - SLS 05.01.2026 06 04 52 AM.xls	5/8/2026 3:4
eBuilder	BAC Data Project Management Cost 05.01.2026 06 30 43 AM (1).xls	5/8/2026 3:4
eBuilder	BAC Report Dashboard.pbix	5/7/2026 3:5
eBuilder	Commitment Funding Items 05.01.2026 06 30 15 AM (1).xls	5/8/2026 3:4

Bond Measure

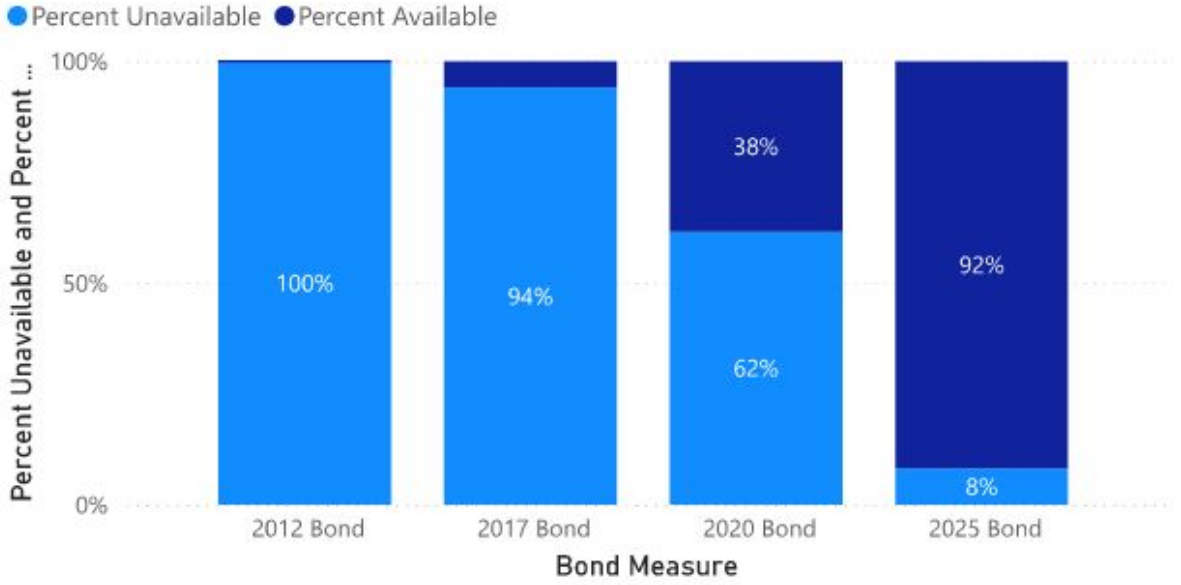
Deselect all | 2012 Bond | 2017 Bond | 2020 Bond | 2025 Bond

Total Funds	Spent to Date	Outstd. Encumbrance	Available Funds	Percent Available
4.6bn	2.1bn	231.4M	2.3bn	49%

Spent to Date and Total Funds



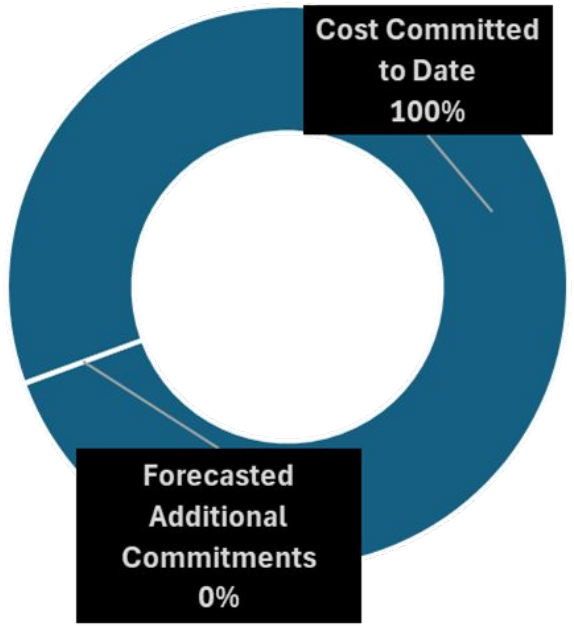
Spent and Encumbered



2012 Bond Program Status – Budget Update - Overview

Modernizations: Franklin HS, Grant HS, Roosevelt HS, and Faubion PK-8
Middle School Science Upgrades
Consolidated Projects: Accessibility, Seismic

Project	Budget	Outstanding Encumbrance	Amount Paid to Date	Remaining Balance
Franklin HS Mod	$110,950,414	$0	$110,950,414	$0
Grant HS Mod	$155,300,188	$0	$155,300,188	$0
Roosevelt HS Mod	$97,128,043	$0	$97,128,043	$0
Faubion Replace	$30,653,663	$0	$30,653,663	$0
Grant Upper Field	$3,170,988	$0	$3,170,988	$0
RHS Phase IV	$6,153,741	$0	$6,153,741	$0
Other Projects	$112,710,428	$0	$112,710,428	$0
Grant & Franklin Add Ons	$326,663	$58,912	$72,164	$195,587
Administration	$31,284,018	$0	$31,284,018	$0
Contingency	$154,104	$0	-$902	$155,006
PPS 2012 Bond Program Total	**$547,832,249**	**$30,504**	**$547,422,744**	**$350,593**



*as of 5/1/26

2012 Bond Spend Down

- The 2012 Bond needs to be closed as the remaining projects wrap up
- There will be approximately $46k left in contingency after requests at Grant and Franklin
- The plan for allocating the remaining $46k will be developed in the coming months

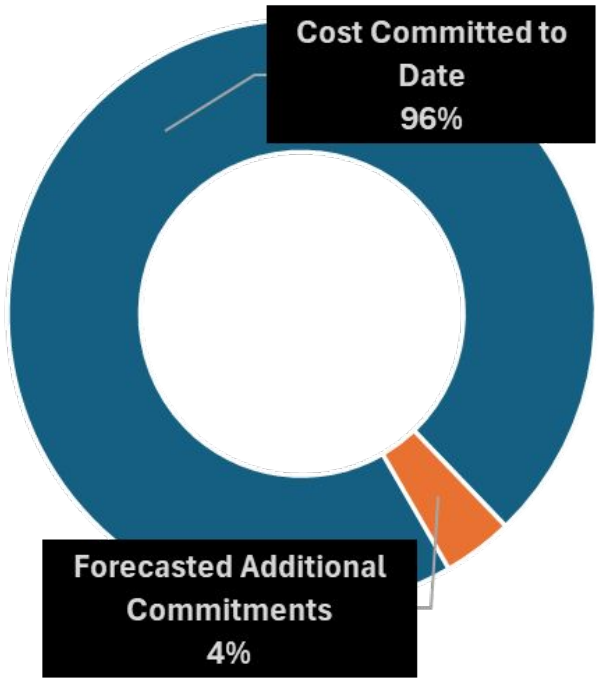
Project Name	Funding Source	Amount Requested
Grant - Flooring Abatement and Replacement - Bond - 6467 - FY25	Grant Add-Ons	$41,000.00
Franklin/Roosevelt blinds	Franklin Add-Ons	$40,000.00
Franklin playground	Franklin Add-Ons	$25,000.00
Grant boiler	Grant Add-Ons	$30,000.00
Total		$136,000.00
Remaining to Spend Down		$45,812.05

2017 Bond Program Status – Budget Update - Overview

Modernizations: Benson Polytechnic, Lincoln, McDaniel, Kellogg Middle School and Multiple Pathways to Graduation

Consolidated Projects: Water Quality, Security Upgrades, New Roofs, Asbestos Abatement, Radon Remediation, Lead Paint Stabilization, Life Safety Upgrades, Accessibility, Seismic

Project	Budget	Outstanding Encumbrance	Amount Paid to Date	Remaining balance
Benson HS Mod	$146,614,560	$158,943	$143,420,606	$3,035,011
Benson Add Ons	$2,865,020	$1,393,148	$60,727	$1,411,144
Benson Swings	$12,199,595	$0	$12,199,595	$0
Lincoln HS Repl	$240,836,448	$28,738	$224,096,580	$16,711,130
Kellogg MS Replace	$57,648,703	$0	$57,648,703	$0
McDaniel Mod	$197,000,000	$13,942	$196,817,745	$168,312
Health & Safety	$157,493,215	$15,985,854	$122,427,460	$19,079,901
Athletics	$4,895,489	$174,034	$2,278,729	$2,442,726
Administration	$61,087,401	$362,789	$60,714,205	$10,408
Contingency	$901,208	$0	$0	$901,208
PPS 2017 Bond Program Total	**$881,541,640**	**$18,117,448**	**$819,664,351**	**$43,759,840**



*as of 5/1/26

2020 Bond Program Status – Budget Update - Overview

Modernizations: Jefferson HS, Pre-Planning/Design Ida B Wells and Cleveland HS, The Center of Black Excellence, Roosevelt (added capacity), and Benson

Consolidated Projects: Curriculum Materials, New Technology for classroom and distance learning, Health & Safety, Seismic, Security, Re-Roofing

Project	Budget Managed by PROCEDEO	Budget Managed by PPS	Outstanding Encumbrance	Amount Paid to Date	Remaining Balance
Benson 2020 Funds		$164,903,890	$1,149,080	$162,801,948	$952,863
Jefferson HS Mod	$366,007,500		$35,067,620	$29,140,229	$301,799,651
Jefferson Add Ons	$152,175		$149,945	$250	
CEE	$60,000,000		$1,700	$16,222,680	$43,775,620
Cleveland HS – Design	$23,679,515		$9,255,919	$14,428,328	-$4,732
Cleveland Swing Site	$137,500		$1,800	$105,905	$29,795
Wells HS – Design	$20,000,000		$2,805,861	$17,207,827	-$13,689
Roosevelt PhV – Design		$2,000,000	$1,035	$97,625	$1,901,340
MPG Building		$80,447,075	$275,317	$77,947,593	$2,224,166
Curriculum		$63,319,191	$1,258,555	$54,603,348	$7,457,287
Technology		$136,100,000	$19,721,614	$87,985,972	$28,392,414
Infra Projects		$269,230,017	$22,505,873	$232,639,288	$14,084,856
Administration		$50,706,072	$1,262,019	$34,070,310	$15,373,743
2017 Bond Balance		$0	$0	$0	$0
Contingency – OSM		$80,451,360	$0	$0	$80,451,360
Unallocated Funds		$15,893,767	$0	$0	$15,893,767
PPS 2020 Bond Program Total	**$469,976,690**	**$853,734,488**	**$84,249,677**	**$727,251,302**	**$512,318,442**



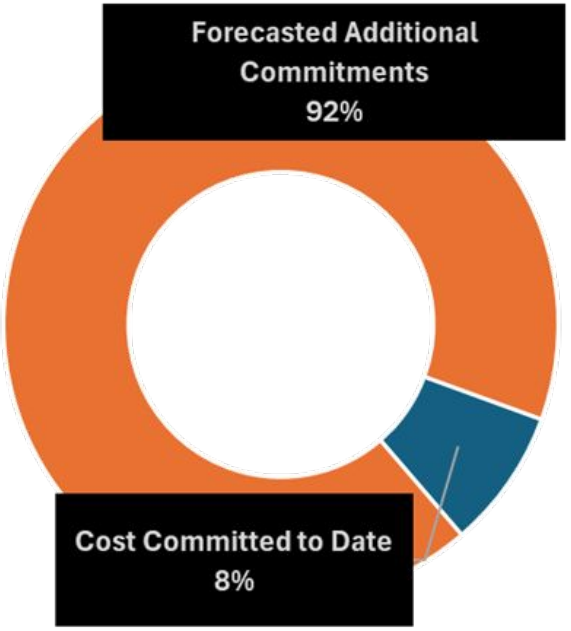
*as of 5/1/26

2025 Bond Program Status – Budget Update - Overview

Modernizations: Cleveland HS, Ida B Wells HS, and Jefferson

Consolidated Projects: Security Upgrades, Seismic, Technology, Improvements for Roosevelt, Lincoln, Franklin, and Grant, and New Athletic Hub Facilities at Jackson MS and Marshall Campuses

Project	Budget Managed by PROCEDEO	Budget Managed by PPS	Outstanding Encumbrance	Amount Paid to Date	Remaining Balance
Priority Scope		$189,867,000	$10,685,685	$137,997	$179,043,318
Athletics		$79,000,000	$2,628,454	$764,969	$75,606,577
Technology		$176,000,000	$3,916,460	$26,173,417	$145,910,123
Physical Education		$10,000,000	$0	$0	$10,000,000
Curriculum		$56,000,000	$0	$0	$56,000,000
Jefferson HS Modernization	$100,000,000		$0	$0	$100,000,000
Cleveland HS Modernization	$448,911,745		$12,196,815	$337,342	$436,377,588
Ida B Wells HS Modernization	$429,350,000		$29,359,062	$0	$399,990,938
Elementary & Middle Schools		$171,738,255	$0	$0	$171,738,255
Admin		$83,050,000	$59,733,554	$6,630,838	$16,685,608
Contingency		$125,956,806	$0	$0	$125,956,806
PPS 2025 Bond Program Total	**$978,261,745**	**$891,612,061**	**$118,520,030**	**$34,044,564**	**$1,717,309,212**



*as of 5/1/26

Project Updates

Jefferson HS Modernization

5210 N Kerby Ave, Portland, OR 97217

Senior CM
Drew Schott

Contractor (CMGC)
Colas Hoffman

PPS Zone 2
Michelle DePass

Architect
BORA & LEVER

Project Budget

Total Budget	CMGC GMP
$466,007,500	GMP: $TBD

Project Overview

Current Phase: In Design
Scope: New Facility
New Facility: 299,485 SF
Construction Start: Spring 2026
Student Move-In: 29-30 School Yr
Tentative Sub Com: Fall 2030
GMP Construction Timeline: TBD

General Scope

- ✔ New all-electric multi-story building
- ✔ Includes a theater, health center, teen parent center, and dance studios
- ✔ Track and field relocated to the site of the current structure
- ✔ New softball field and baseball/soccer multiuse field

Project Status

Design Procurement
100%

Design
75%

50% CDs In Progress

Construction
0%

Construction NTP
Pending

Project Update

1	Beginning early procurement of critical materials such as steel and timber
2	Prep underway for start of construction of baseball and softball fields this Spring
3	Groundbreaking: 12pm on May 29, 2026

Project Floor Plan

See next slide for floor plans

PROCEDEO | PORTLAND Public Schools

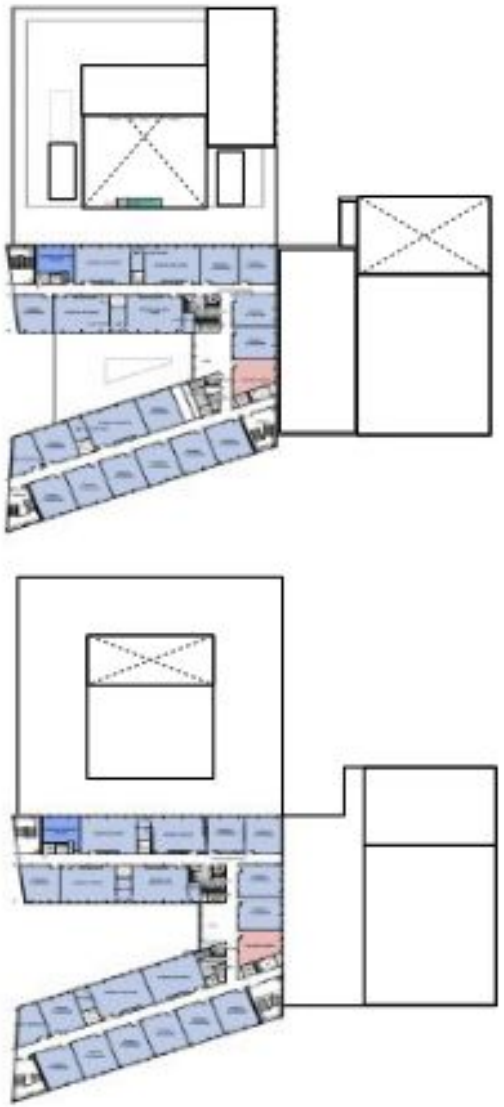
> Floor Plans Levels 1-4



Level 1



Level 2



Levels 3-4

Cleveland HS Modernization

3400 SE 26th Ave, Portland, OR 97202

Senior CM
Drew Schott

Contractor (CMGC)
Skanska

PPS Zone 6
Stephanie Engelsman

Architect
Mahlum

Project Budget

Total Budget	CMGC GMP
$472,553,760	GMP: TBD

Project Overview

Current Phase: In Design
Scope: New Facility
New Facility: 297,000 SF
Construction Start: Summer 2026
Student Move-In: 29-30 School Yr
Tentative Sub Com: Summer 2029
GMP Construction Timeline: TBD

General Scope

- ✔ 2 new four-story buildings connected by a skybridge
- ✔ Dynamic outdoor courtyard
- ✔ New arts theater, black box theater, 2 gyms, and dance and wrestling studios
- ✔ Improvements to track and athletic fields

Project Status

Design Procurement
100%

Design
80%

50% CDs In Review

Construction
0%

Construction NTP
Pending

Project Update

1	Marshall improvements are scheduled to be substantially complete in early August.
2	Groundbreaking at 1pm on June 12, 2026.
3	- Cleveland Youth Track, Wrestling, and Saturday Youth Events will shift to the Marshall fields. - All other Youth Programs will use the MS sites or Portland Parks - PIL has coordinated these efforts

Project Floor Plan

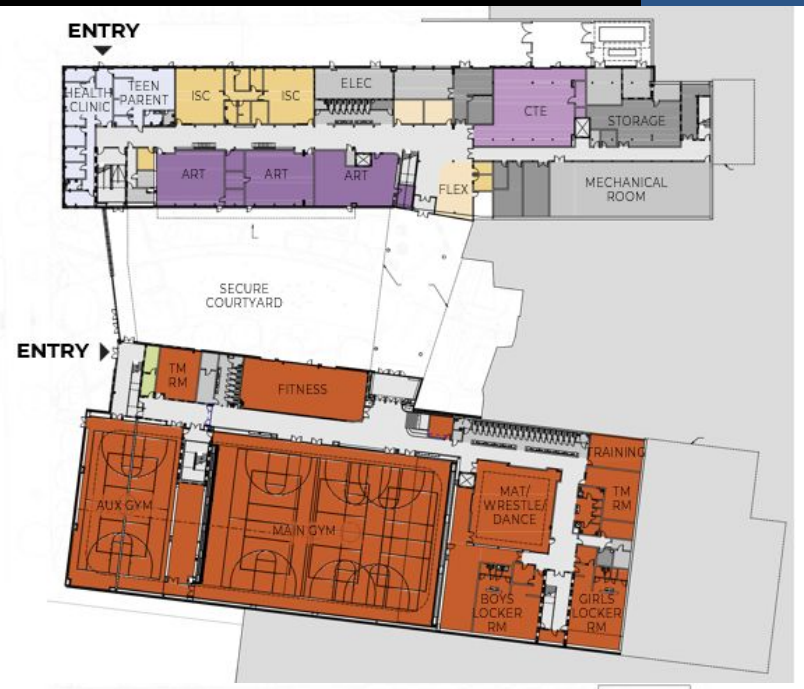
See next slide for floor plans

PROCEDEO | PORTLAND Public Schools

> Floor Plans Levels 1-4

L01

- FLEX LEARNING
- SPED + LRC
- CTE
- VISUAL + PERFORMING ARTS
- WRAP-AROUND SERVICES
- GYM + ATHLETICS
- MISCELLANEOUS
- CUSTODIAL



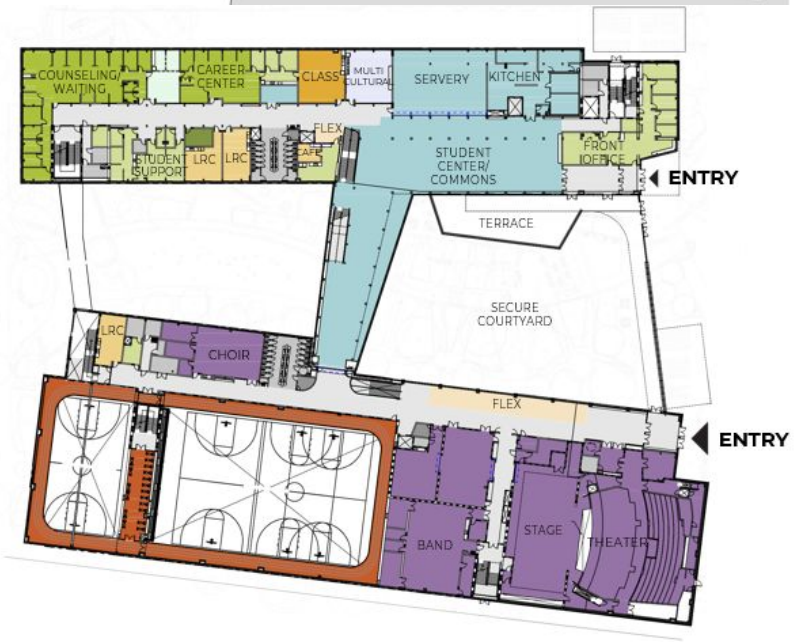
L03

- ADMIN / STUDENT SPACE
- LIBRARY / MEDIA CENTER
- FLEX LEARNING
- SPED + LRC
- GENERAL CLASSROOMS
- CTE
- VISUAL + PERFORMING ARTS
- MISCELLANEOUS
- CUSTODIAL



L02

- ADMIN / STUDENT SPACE
- COUNSELING / CAREER
- FLEX LEARNING
- SPED + LRC
- GENERAL CLASSROOMS
- VISUAL + PERFORMING ARTS
- STUDENT COMMONS
- GYM + ATHLETICS
- MISCELLANEOUS
- CUSTODIAL

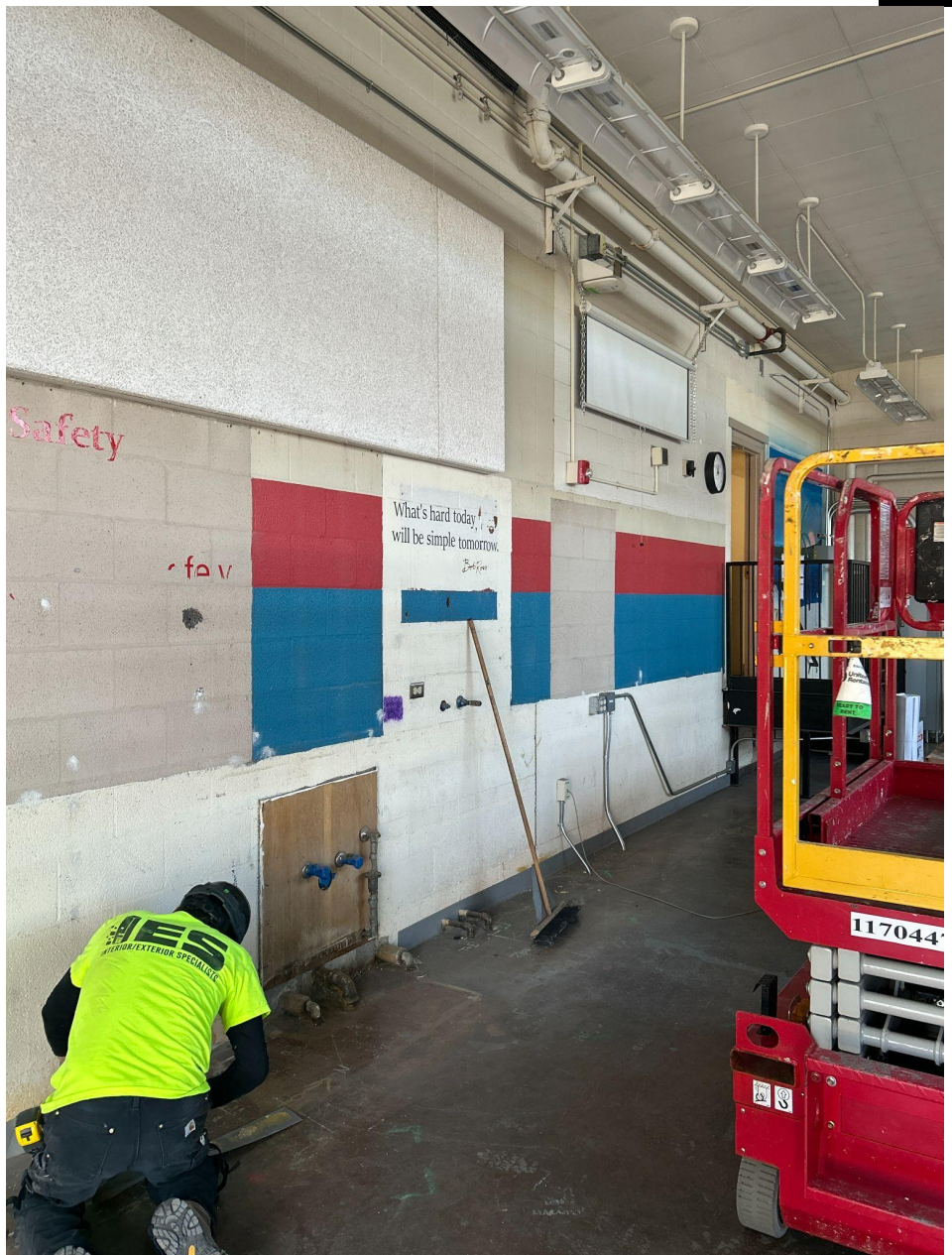


L04

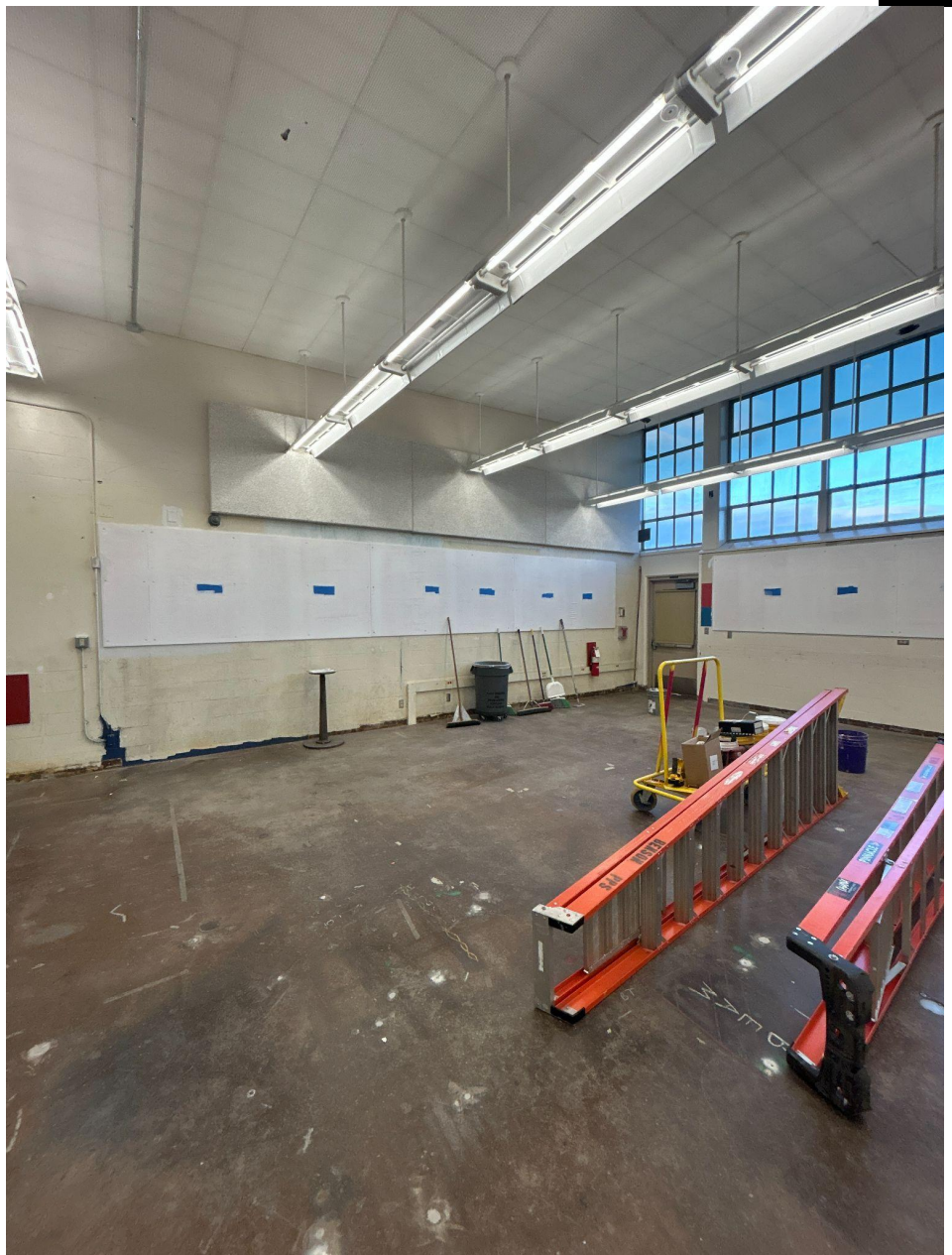
- ADMIN / STUDENT SPACE
- FLEX LEARNING
- SPED + LRC
- GENERAL CLASSROOMS
- CTE
- MISCELLANEOUS
- CUSTODIAL



> Marshall Interior



> Marshall Interior



> Marshall Interior



Ida B Wells HS Modernization

1151 SW Vermont St, Portland, OR 97219

Senior CM
Drew Schott

Contractor (CMGC)
Hoffman Construction

PPS Zone 1
Christy Splitt

Architect
BORA Architects

Project Budget

Total Budget	CMGC GMP
$449,350,000	GMP: $TBD

Project Overview

Current Phase: In Design
Scope: New Facility
New Facility: 283,867 SF
Construction Start: Winter 2026
Student Move-In: 29-30 School Yr
Tentative Sub Com: Fall 2030
GMP Construction Timeline: TBD

General Scope

- ✔ New four-story building including instructional spaces for Career Technical Education programs
- ✔ New performing arts, commons, and outdoor spaces
- ✔ Full complement of athletic fields and upgrade of existing fields on the Rieke side
- ✔ The existing pool is not in the scope, but a new pool support building is included

Project Status

Design Procurement
100%

Design
75%

50% CDs In Progress

Construction
0%

Construction NTP
Pending

Project Update

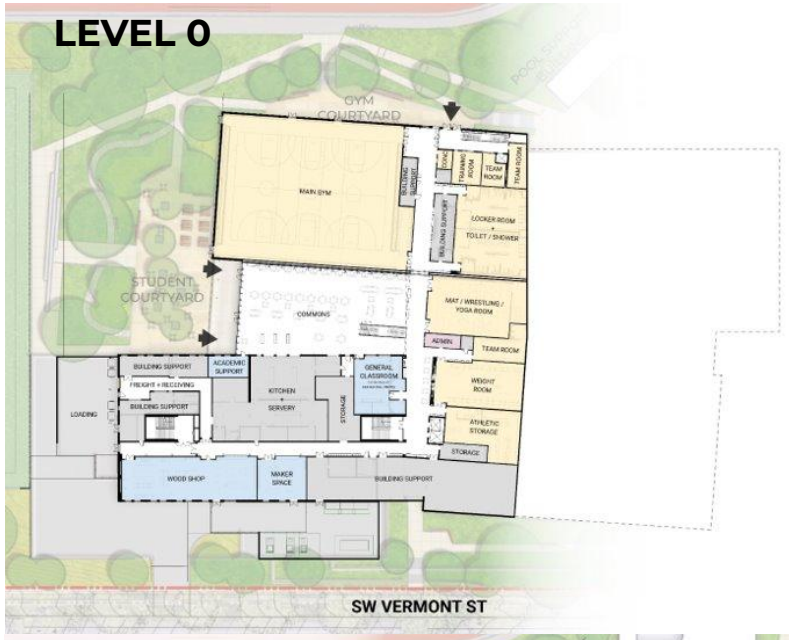
1	Next submittal will be the 50% CD review
2	Coordinating site safety plan with the stakeholders
3	Coordinating with PBOT on planned safe sidewalk closures

Project Floor Plan

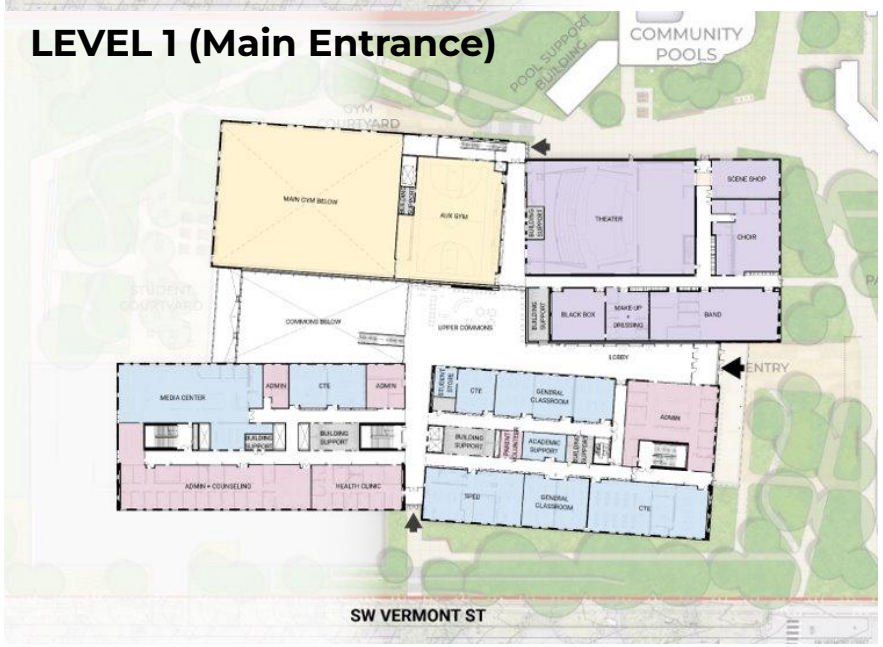
See next slide for floor plans

> Floor Plans Levels 0-3

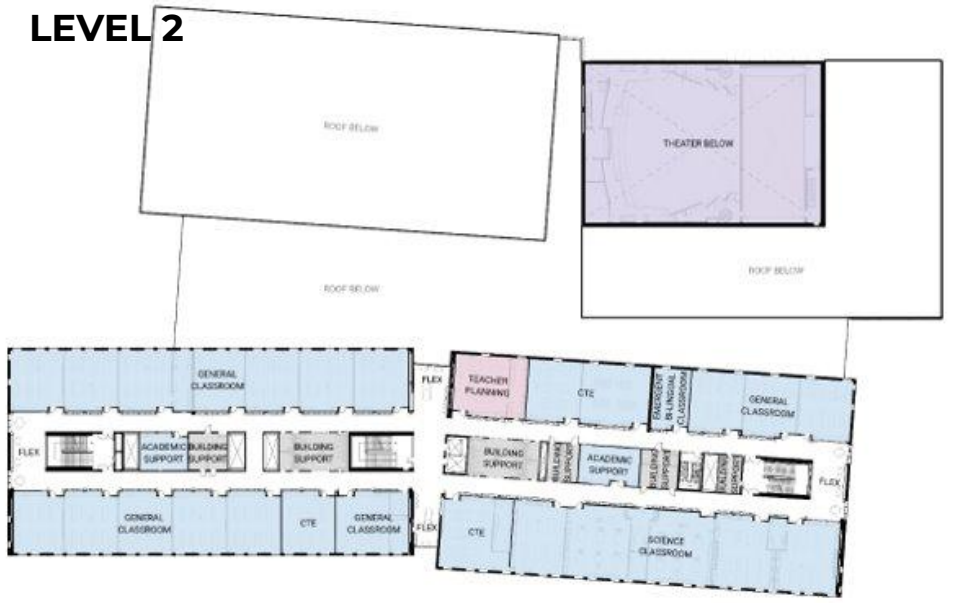
LEVEL 0



LEVEL 1 (Main Entrance)



LEVEL 2



LEVEL 3



Grice-Adair Center for Educational Excellence

1 N. Fremont St, Portland, OR 97227

Senior CM
Drew Schott

Contractor (CMGC)
TBD

Architect
TBD

Project Budget

Total Budget	CMGC GMP
$60,000,000	GMP: $TBD

Project Overview

Current Phase: Planning
Scope: Renovations
Renovations: TBD
Construction Start: TBD
Tentative Sub Com: TBD
GMP Construction Timeline: TBD

General Scope

✔ TBD

Project Status

Design Procurement
100%

Design
0%

Construction
0%

Construction NTP
Pending

Project Update

1	Work is assigned to an AE, Task Order is in progress
2	Program development documents are complete and submitted to AE for proposal
3	Kickoff meeting for programming between PPS and AE is scheduled in June 2026

> Exterior





> Interior



Planning

> Courtyard Exterior



Planning

Consolidated Projects - Curriculum

Device Refresh

- New computers for ALL PPS students
- 41,500 devices will be deployed
- Pilot deployments at six schools is complete
- All schools will have newly deployed devices by the beginning of the 26-27 school year

Existing Device Reuse

- Chromebooks currently in circulation will be collected over the summer and will be assessed and graded by our partner vendor (Micro K12).
  - Grading System
    - A grade - will stay with PPS as safety stock
    - B grade - will be donated to other school districts where possible or kept for parts.
    - C grade - will be donated to a local charity such as FreeGeek.

Consolidated Projects - Seismic/Roofing

<u>Summer 2026 Construction</u>

Roofing with Seismic

- Contractor contracts executed for Summer 2026 work
  - Woodmere
  - Cesar Chavez
  - Marshall
  - Vestal

Seismic Parts

- Construction bids received, contracts anticipated to be in front of board in late May
  - Vernon
  - Winterhaven
  - Marysville (Ph 3)

Consolidated Projects - Seismic/Roofing

Anticipated 2027 Construction Start

Seismic Parts and Partial Roof

- Design Contract executed
  - Richmond
  - Capitol Hill

Seismic Parts

- Design Contracts anticipated to be in front of board in May
  - Ainsworth and Kelly

Full Seismic

- Design in progress
  - Beverly Cleary

Anticipated 2028 and 2029 Construction

Seismic Parts and Partial Roof

- Beach

Full Seismic and roof

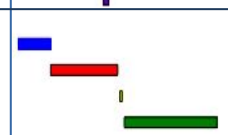
- Rose City Park
  - Contract expected to be before the Board in May 2026

Consolidated Projects – Facility Improvements

Summer 2026 Construction

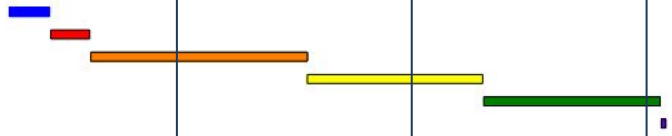
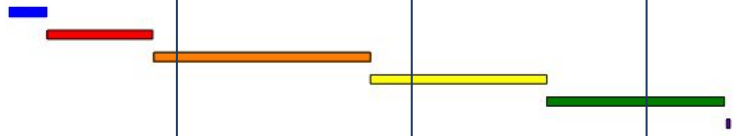
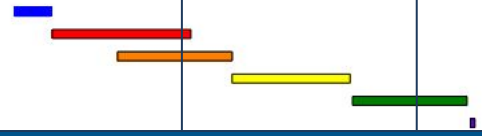
- Franklin Condenser Replacement – Anticipated
- Buckman -Dance Studio Truss Replacement, Cafeteria Flooring Replacement
- Boise Elliot – Repaint majority of school
- Capitol Hill – Flooring abatement, subfloor repairs, new flooring
- Jefferson – Stage rigging repairs
- Sitton – Truss repair/replacement
- Rose City Park – Boiler re-tubing
- Vestal – Built-in cafeteria table replacement
- DDC Controls Upgrades - Multiple Sites
- Fire Alarm Upgrades - Multiple Sites

Program Athletics Schedule Update

Athletics Schedule May 2026		2026	2027	2028	2029	2030
1	Grant Bowl Lights					
2	Marshall Hub - Field, Track & Tennis					
3a	Jackson Hub - Phase 1					
3b	Jackson Hub - Phase 2					
All future dates, durations and projections are subject to change						

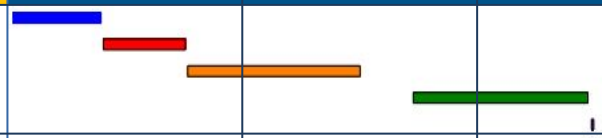
Design	Procurement	Land Use	Permitting	Construction Phase	Closeout

Program Athletics Schedule Update

Athletics Schedule May 2026		2026	2027	2028	2029	2030
1	Roosevelt					
2	Franklin					
3	West Sylvan					
4	Grant Seating					
All future dates, durations and projections are subject to change						

Design Programming	Procurement	Land Use	Permitting	Construction Phase	Closeout

Program Athletics Schedule Update

Athletics Schedule May 2026		2026	2027	2028	2029	2030
1	Marshall Hub - Upper Field					
2	Powell Park					
3	Jefferson Field					

All future dates, durations and projections are subject to change

Design Programming	Procurement	Land Use	Permitting	Construction Phase	Closeout

Consolidated Projects - Athletics

Grant Bowl Lighting

- Electrical gear installation and Substantial Completion at end of May
- Ribbon Cutting Ceremony planned in June

Jackson Athletic Hub

- Phase 1: Upper Field is nearing design completion with construction anticipated to start in June
  - Track & Field completion Fall 2026
- Phase 2: Design on Multi-Use Field is expected to be complete in July 2026
  - Multi-Use completion Spring 2027

Powell Park Multi-Use Field, Lighting, and Support Buildings

- Continuing discussions with Parks for use agreement

Land Use Application in Progress

- W Sylvan, Franklin, Roosevelt, Grant HS Seating

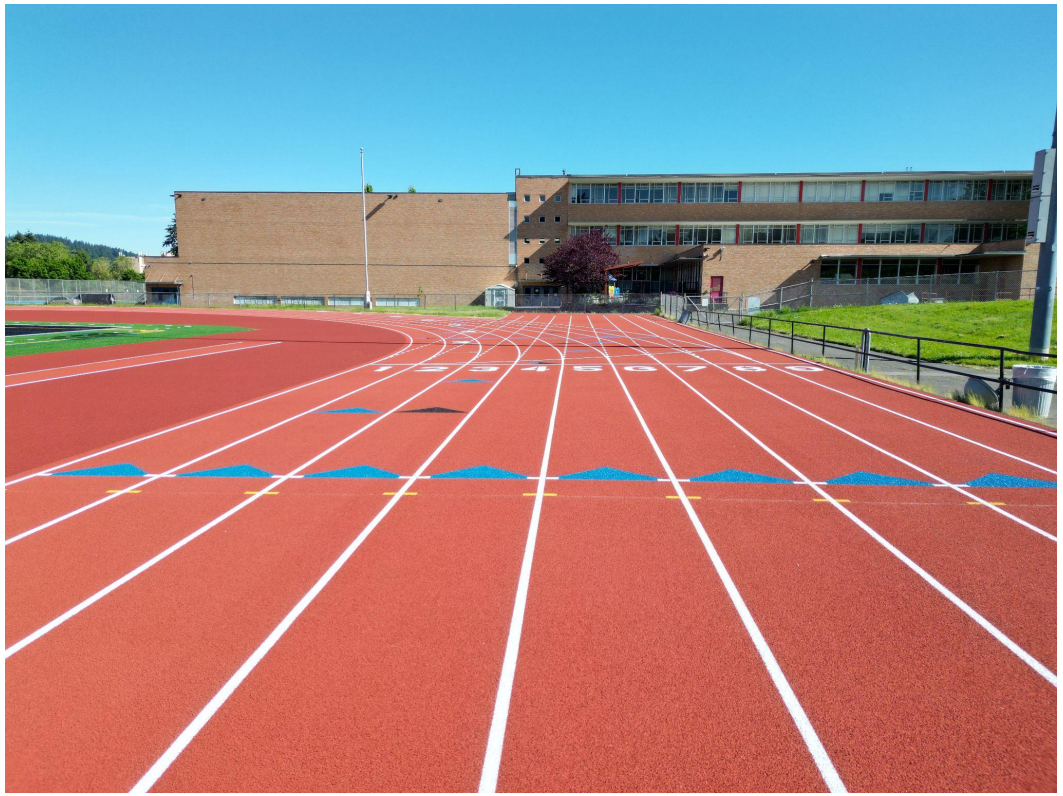
Grant Bowl Lighting



Consolidated Projects - Athletics

Marshall Athletic Improvements

- Substantially complete, with punch list in progress
  - Targeting availability for first week of June
  - Track
  - Field
  - Tennis Courts
- Gym
  - Targeting availability for use in mid-June
- Weight Room
  - Painting and equipment relocation from Cleveland scheduled for June
  - Targeting availability for use in early July




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AND
10
20



Questions
Thank You



Contact us

PPS.NET pubinfo@pps.net (503) 916-2000 501 N Dixion, Portland, OR 97227



PORTLAND
Public Schools

RESOLUTION No. 7291

Resolution to Amend the District's Public Contracting Rules

RECITALS

A. The Board of Directors of School District No. 1J, Multnomah County, Oregon ("District") acts as the Local Public Contract Review Board ("Board") pursuant to ORS 279A.060.

B. ORS 279A.065 empowers public contracting agencies to adopt rules of procedure for public contracts, and the District has adopted such rules ("2024 Rules").

C. The Board deems it necessary and advisable to adopt updated rules ("2026 Rules") to improve internal consistency and alignment with other Board policies.

RESOLUTION

1. The Board hereby adopts the 2026 Rules attached hereto as Exhibit A as the District's Public Contracting Rules.

2. The District's 2026 Rules supersede and replace the District's 2024 Rules.

PORTLAND PUBLIC SCHOOLS

2026 PUBLIC

CONTRACTING RULES

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PPS DIVISION 45

DISTRICT CONTRACTS GENERALLY

PPS 45-0000 Generally

Except as expressly provided in other School Board Policies, PPS divisions 45, 46, 47, 48, and 49 (collectively, the "Portland Public Schools Public Contracting Rules") govern all District Contracts. These division 45 rules address delegation of contracting authority under ORS 279A.075 and 332.075, Ethics in Contracting, and procurement from Qualified Rehabilitation Facilities. Divisions 46, 47, 48, and 49 govern Public Contracts as defined in ORS chapters 279A, 279B, and 279C (the Public Contracting Code). Except as otherwise expressly provided in School Board Policy or these rules, these division 45 rules apply to all District Contracts, including Public Contracts as defined in the Public Contracting Code.

PPS 45-0100 Definitions

As used in the Public Contracting Code and divisions 45, 46, 47, 48, and 49 of these rules, and except as otherwise provided in School Board Policy:

(1) "District Contract" means all Contracts entered into by the District, including Public Contracts subject to the Public Contracting Code and divisions 46, 47, 48, and 49, and all other Contracts or agreements entered into by the District. For the purpose of these Public Contracting Rules, "District Contract" does not include settlements of lawsuits or other claims against the District that continue to be governed by Board Policy 8.60.021-P, or the purchase, conveyance, acceptance, sale, or lease of real property or an interest in real property.

AUTHORITY TO APPROVE AND EXECUTE DISTRICT CONTRACTS

PPS 45-0200 Authority to Approve District Contracts; Delegation of Authority to Superintendent

(1) The District is the Contracting Agency within the meaning of the Public Contracting Code.

(2) Except as otherwise provided in these rules, the powers and duties of the Local Contract Review Board under these rules shall be exercised and performed by the School Board, and the powers and duties of the District under the rules shall be exercised and performed by the Superintendent.

(3) Except as provided in section (4) of this rule or as otherwise expressly authorized in these rules, the School Board shall approve all District Contracts.

(4) Pursuant to ORS 279A.075 and 332.075(3), and except as expressly limited by other School Board Policy, the School Board delegates to the Superintendent the authority to enter into and approve payment on District Contracts in the following circumstances:

- **(a)** The District Contract is within appropriations made by the School Board and is not a collective bargaining agreement or a Service Contract that includes the provision of labor performed by employees of the School District, as defined in ORS 332.075(3); and
- **(b)** In any of the following circumstances:
  - **(A)** The total amount payable by the District under the individual District Contract does not exceed $150,000;
  - **(B)** The District Contract is for routine and customary expenditures, including but not limited to payroll, payroll taxes and benefits, utility bills, and postage;
  - **(C)** Advance authorization has been given by the School Board for the Superintendent to execute a particular District Contract or class of District Contracts;

(D) The District Contract is an Emergency Procurement;

(E) The District Contract is a change order or Contract amendment to a prior-approved Contract authorized under these rules;

(F) An offer of judgment made in the course of litigation in with the District is a party when the Superintendent and general counsel determine that such an offer is in the best interest of the District or is to the District's tactical advantage; or

(G) These rules otherwise expressly authorize the Superintendent to approve the Contract.

(5) The Superintendent may designate in writing any District employee or employees to exercise all or a portion of the Superintendent's powers and duties under these rules.

(6) If the Superintendent authorizes an offer of judgment pursuant to PPS 45-0200(4)(b)(F) in an amount exceeding $75,000, the superintendent shall request that the general counsel draft a lawyer-client privileged memo to the School Board to explain the legal basis for the offer of judgment.

(7) No district employee or official shall authorize and no contractor shall undertake any work under a district contract prior to full execution of the contract by all authorized signatories. Notwithstanding the forgoing, the Superintendent may authorize work to begin under a contract prior to full execution in the following circumstances:

(a) The contract is an intergovernmental agreement pursuant to ORS chapter 190, the parties have agreed in principal to the terms of the contract, and the only remaining step is circulation of the Contract for approval; or

(b) The contract is an amendment that is subject to approval of the Board of Education because it will increase the cost of the contract above the superintendent's contract approval authority, but the Board approval process will cause a delay in work completion that will prevent timely delivery of essential services. For the purposes of this exception, "essential services" means goods, services, personal services, or construction services necessary for a school to open on time, a class to start on time, a class or program to complete on time, to comply with conditions of grant that is otherwise at risk of loss, or other services critical to timely and complete education of district students. The Superintendent will only authorize such work in cases where the delay is caused by factors outside of the District's control and that could not have been identified when the contract was first negotiated.

ETHICS IN CONTRACTING

PPS 45-0300 Policy

These rules supplement and do not replace the Oregon Government Ethics Law (ORS 244.010 through 244.400). These rules are designed to accomplish the policy of ORS 244.010 that service as a public official is a public trust and that implementation of District Contracting under these rules and the Public Contracting Code should be free of undisclosed conflicts or undue influence.

PPS 45-0305 Ethics in the Solicitation and Award of District Contracts

District officers who participated in the process of development, selection, and award of District Contracts shall comply with the following rules:

(1) Definitions:

(a) **"Business"** means any corporation, partnership, proprietorship, firm, enterprise, franchise, association, organization, self-employed individual, and any other legal entity operated for economic gain, but excluding any income producing, not-for-profit corporation that is tax exempt

under section 501(c) of the Internal Revenue Code with which the District officer or relative is associated only as a member or board director or in a non-remunerative capacity. If the business is privately held, the District official or relative is "associated with the business" if the Person is a director, officer, owner, or employee, or in which the Person owns or has owned stock, debt instruments, stock options, or other form of equity interest worth more than $1,000 in the preceding calendar year. If the business is publicly held, the District official or relative is "associated with the business" if the Person is a director or officer or owns or has owned $100,000 or more of stock, debt instruments, stock options, or other form of equity interest in the preceding calendar year. If the District official is required to file a statement of economic interest, "business" also includes a business listed as a source of income as required under ORS 244.060(3).[1]

(b) **"Conflict of interest"** means any action, decision, or recommendation by a District officer in the course of participating in a procurement under these rules that would ("actual conflict of interest") or could ("potential conflict of interest") be to the private pecuniary benefit or detriment of the District officer, a relative of the District officer, or a business with which the District officer or relative is associated. For the purpose of this requirement:

(c) **"District officer"** means any person who is serving the District as an elected official, appointed official, employee, or agent, whether or not the person is compensated for those services.

(d) **"Gift"** means something of economic value given to a public official or the public official's relative without an exchange of valuable consideration of equivalent value, including the full or partial forgiveness of indebtedness, which is not extended to others who are not public officials or the relatives of public officials on the same terms and conditions. "Gift" also includes something of economic value given to a public official or the public official's relative for valuable consideration less than that required from others who are not public officials.

(e) **"Relative"** means:

(A) The District officer's spouse or domestic partner;

(B) Children of the District officer, spouse, or domestic partner;

(C) Siblings, spouses of siblings, or parents of the public official, spouse, or domestic partner;

(D) Any individual for whom the District officer has a support obligation;

(E) Any individual for whom the District officer provides benefits related to the public official's public employment or from whom the District officer receives benefits; and

(F) Any person who resides with the public official.

(2) Disclosure of Conflict of Interest Required. Any District official participating in a District procurement, whether for goods or services, Personal services, Public Works, Public Improvements, or any other District Contract shall disclose actual or potential conflicts of interest.

(a) Appointed District Officials. An appointed District official shall disclose actual or potential conflicts of interest in writing to the District official's appointing authority (the person who has hire-and-fire authority over the official). This writing shall disclose the nature of the conflict and request the appointing authority to dispose of the matter. The appointing authority shall respond in writing by designating an alternate to dispose of the matter or directing the District officer to dispose of the matter as directed by the appointing authority.

[1] The only District officials required to file a statement of economic interest are the Superintendent and the chief financial officer.

(b) Elected District Official or Officials Who Serve on Advisory Boards or Commissions. Such District officials shall publicly announce an actual or potential conflict of interest prior to taking any action on the matter giving rise to the conflict. If the conflict is an actual conflict of interest, the public official shall refrain from participating in the decision or discussion of the issue. If the conflict is only a potential conflict of interest, the public official may participate in the debate and decision following disclosure of the potential conflict.

(3) Gifts. District officers are prohibited from soliciting or receiving gifts with an aggregate value of in excess of $50 in a calendar year from any single source that could reasonably be known to have a legislative or administrative interest in any matter subject to the decision or vote of the District official. For the purpose of this section, a District official is considered a decision-maker in the procurement process if he or she makes decisions or recommendations in regard to the drafting of the procurement, the Solicitation process, the opening, review, or scoring of the Solicitation, or a recommendation or decision to award, correct, or reject a solicitation, or response to or resolution of a protest.

(4) Use of Office for Personal Gain Prohibited. District officers, employees, and agents are prohibited from using their official position for personal gain.

(5) Use of Confidential District Information for Gain Prohibited. District officers, employees, and agents are prohibited from using confidential information gained in the course of the screening and selection procedures for personal financial gain.

PPS 45-0310 Additional Standards of Conduct for Procurement of District Contracts Funded in Whole or in Part by Federal Award

In addition to compliance with ORS 244 and PPS 45-0300 to 45-0305 with District employees, officers and agents in the selection, award, or administration of any contract shall comply with 2 CFR 318(c)(1) regarding procurement of District Contracts funded in whole or in part by Federal award:

(1) No District employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if such person has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of such persons immediate family, such persons partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. A district employer, officer, or agent shall notify such person's appointing authority and shall immediately cease participation in all procurement or award activities relating to or management of such contract.

(2) District officers, employees, and agents may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts supported by a Federal award. This section shall not apply to items that are excluded from the definition of "gift" in ORS 244.020.

(3) A district employer, officer, or agent who violates any of the standards set forth in PPS 45-0310 will be subject to discipline up to and including termination.

PPS 45-0315 Penalties

Any District employee, officer, or agent that fails to comply with PPS 45-0300 to 45-0310 can face investigation or penalty under ORS chapter 244 and/or adverse employment action up to and including termination.

PROCUREMENT FROM QUALIFIED REHABILITATION FACILITIES ("QRF")

PPS 45-0405 QRF Definitions

(1) "QRF" means an activity center or rehabilitation facility, certified as a community rehabilitation program or as a vocational service provider through the Oregon Department of Human Services that the State procurement Office has determined to be qualified under OAR 125-055-0015.

(2) "QRF Procurement List" means a listing of those nonprofit agencies for disabled individuals who currently are qualified, under OAR 125-055-0015, to participate in the program created by ORS 279.835 through 279.850 and includes, as required by ORS 279.850(1), a list of the products and services offered by QRFs and determined by the State Procurement Office, under OAR 125-055-0020, to be suitable for purchase by Contracting Agencies such as the District.

PPS 45-0410 Required Procurement of QRF Products or Services

(1) As required by ORS 279.850(1), if the District intends to procure a Product or service that is listed on the QRF Procurement List, the District shall procure that Product or service, at the Price determined by the State of Oregon Procurement Office, from a QRF if the Product or service is of specifications appropriate to the District's procurement needs and is available within the time required by the District.

(2) The most current QRF Procurement List may be reviewed at the State of Oregon procurement Office Web site at https://dasapp.oregon.gov/qrf/index.aspx.

(3) The Public Contracting Code does not apply to QRF procurements pursuant to ORS 279A.025(4). QRF procurements are therefore exempt from divisions 46, 47, 48, and 49 of these rules.

PPS 45-0500 Contract Extensions

Except as otherwise provided in these rules:

(1) A Current Contract May Be Extended to Complete the Contract Work. If it appears that a District Contract will expire according to its terms before the work provided under the Contract will be completed, the Superintendent may extend the Contract for such period of time necessary to complete the work.

(2) An Expired Contract May Be Reinstated to Complete the Contract Work. If a District Contract inadvertently expires according to its terms before the work provided under the Contract is completed, the Superintendent may reinstate the Contract for such period of time necessary to complete the work. The reinstated Contract shall be deemed to begin upon the expiration of the prior Contract and end upon the termination date set forth in the extension.

(3) A Contract Extension May Not Include Substantive Amendments to the Contract. An extension may not be used to amend or change the scope of the Contract or increase the price of the Contract, except as otherwise may be allowed in these rules. Contract amendments are subject to PPS 46-0480, 47-0800, or 49-0910, depending on the type of Contract.

END OF DIVISION 45

PPS DIVISION 46

PUBLIC CONTRACTING RULES APPLICABLE TO ALL PUBLIC CONTRACTS AND PERSONAL SERVICES CONTRACTS

PPS 46-0000 Generally

These division 46 rules are intended to implement the provisions of ORS 279A applicable to all public procurements, and the provisions of the Uniform Guidance for all District Contracts supported in whole in part by a Federal award. Division 46 also addresses delegation of contracting authority under ORS 279A.075 and 332.075, Contracts for Personal services, and ethics in District Contracting.

PPS 46-0100 Application

(1) Pursuant to ORS 279A.065(5), the District hereby adopts its own public contracting rules ("rules" or "a rule"). Pursuant to ORS 279A.065(1), the Attorney General's Model Rules do not apply to the District. Pursuant to ORS 279A.065(5), the District adopts these rules. These rules consist of the following four divisions:

- **(a)** Division 46 applies to all Public Contracts and implements ORS 279A.
- **(b)** Division 47 applies only to Public Contracts for goods or services and implements ORS 279B.
- **(c)** Division 48 applies only to Public Contracts for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, or Land Surveying services and related service contracts and implements ORS 279C.100 through 279C.125
- **(d)** Division 49 applies only to Public Contracts for Construction services and implements ORS 279C.300 through 279C.910.

(2) Most of these rules are adapted from the Attorney General's Model Rules and the numbering generally tracks the numbering in OAR Chapter 137 divisions 46, 47, 48, and 49. Except where these rules differ from the Model Rules, the District intends its rules to be interpreted consistently with the Model Rules.

(3) These rules apply to Public Contracts first advertised on or after January 1, 2024.

(4) The District shall review the rules each time the Attorney General modifies the Model Rules to ensure compliance with statutory changes. The District may adopt other rules, and modify as necessary, to carry out the provisions of the Public Contracting Code pursuant to ORS 279A.070.

PPS 46-0110 Definitions

As used in the Public Contracting Code and divisions 45, 46, 47, 48, and 49 of these rules, unless the context or a specifically applicable definition requires otherwise:

(1) **Addendum** or **Addenda** means an addition to or deletion from, a material change in, or general interest explanation of a Solicitation Document.

(2) **Administering Contracting Agency** means a governmental body in this state or in another jurisdiction that solicits and establishes the Original Contract for procurement of goods, services, or Public Improvements in a Cooperative Procurement. Administering Contracting Agency includes, for Interstate Cooperative Procurements, any governmental body, domestic or foreign, that is authorized under the governmental body's laws, rules, or regulations, to enter into Public Contracts.

(3) **Award** means, as the context requires, either the act or occurrence of the District's identification of the Person with whom the District shall enter into a Contract following the resolution of any protest of the District's selection of that Person and the completion of all Contract negotiations.

(4) Benefit Company means a corporation or a limited liability company that is incorporated, organized, formed or created under ORS 60.754 and the corporation's articles of incorporation state that the corporation is a benefit company subject to ORS 60.750 to 60.770.

(5) Bid means a written response to an Invitation to Bid.

(6) Bidder means a Person who submits a Bid in response to an Invitation to Bid.

(7) Brand Name or Equal Specification is defined in ORS 279B.200(1) and means a specification that uses one or more manufacturers' names, makes, catalog numbers, or similar identifying characteristics to describe the standard of quality, performance, functionality, or other characteristics needed to meet the District's requirements, and that authorizes Offerors to offer goods or services that are equivalent or superior to those named or described in the specification.

(8) Brand Name Specification is defined in ORS 279B.200(2) and means a specification limited to one or more products, Brand Names, makes, manufacturers' names, catalog numbers, or similar identifying characteristics.

(9) CFR means the Code of Federal Regulations of the United States of America.

(10) Class Special Procurement is defined in ORS 279B.085 and means a contracting procedure that differs from the procedures described in ORS 279B.055, 279B.060, 279B.065, and 279B.070, and is for the purpose of entering into a series of Contracts over time or for multiple projects for the acquisition of a specified class of goods or services.

(11) Closing means the date and time specified in a Solicitation Document as the deadline for submitting Offers.

(12) Code means the Public Contracting Code.

(13) Competitive Sealed Bidding is a procurement process where a Contract is awarded based on price pursuant to the lowest Responsive and Responsible bidder.

(14) Competitive Range means the Proposers with whom the District shall conduct discussions or negotiations if the District intends to conduct discussions or negotiations in accordance with PPS 47-0261 or 49-0650.

(15) Contract means a contract for sale or other disposal, or a purchase, lease, rental or other acquisition, by the District of personal property, services, including personal services, public improvements, public works, minor alterations, or ordinary repair or maintenance necessary to preserve a public improvement. "Contract" does not include grants.

(16) Contract Price means, as the context requires, the maximum monetary obligation that the District either will or may incur under a Contract, including bonuses, incentives, and contingency amounts, if the Contractor fully performs under the Contract.

(17) Contract Review Board or **Local Contract Review Board** means the District Board of Directors acting as the Local Contract Review Board for the District under ORS 279A.060.

(18) Contracting Agency is defined in ORS 279A.010(1)(b) and means a Public Body authorized by law to conduct a procurement. Contracting Agency includes, but is not limited to, the Director of the Oregon Department of Administrative services and any Person authorized by a Contracting Agency to conduct a procurement on the Contracting Agency's behalf. Contracting Agency does not include the judicial department or the legislative department.

(19) Contractor means the Person with whom the District enters into a Contract and is interchangeable with "Consultant" and "Provider."

(20) Cooperative Procurement is defined in ORS 279A.200 and means a procurement conducted by an Administering Contracting Agency on behalf of one or more governmental bodies. "Cooperative Procurement" includes, but is not limited to, multi-party Contracts and Price Agreements. "Cooperative Procurement" does not include an agreement formed among only governmental bodies under ORS chapter 190 or other legal authority for establishing agreements between or among governmental bodies or agencies or tribal governing bodies or agencies.

(21) Cooperative Procurement Group means a group of authorized Contracting Agencies or other governmental body, domestic or foreign, joined through an intergovernmental agreement for the purposes of facilitating Cooperative Procurements pursuant to ORS 279A.200.

(22) Days means calendar days, except as otherwise specified in these rules.

(23) Designated Procurement Officer means the individual designated and authorized by the Superintendent to perform certain procurement functions described in these rules.

(24) Descriptive Literature means the written information submitted with the Offer that addresses the goods and services included in the Offer.

(25) District means School District No. 1J, Multnomah County, Oregon, doing business as Portland Public Schools.

(26) Disqualification means a disqualification, suspension, or Debarment pursuant to ORS 200.065, 200.075, or 279A.110, or PPS 46-0210.

(27) Electronic Advertisement means the District's Solicitation Document, Request for quotes, Request for Information, or other document inviting participation in the District's procurements available over the Internet via (a) the World Wide Web or some other internet protocol or (b) the District's electronic procurement System.

(28) Electronic Offer means a response to the District's Solicitation Document or Request for quotes submitted to the District via (a) the World Wide Web or some other internet protocol or (b) the District's electronic procurement System.

(29) Electronic Procurement System means an information system that Persons may access through the Internet, using the World Wide Web or some other Internet protocol, or that Persons may otherwise remotely access using a computer that enables Persons to send Electronic Offers and the District to post Electronic Advertisements, receive Electronic Offers, and conduct other activities related to a procurement.

(30) Emergency means circumstances that:

- **(a)** Could not have been reasonably foreseen;
- **(b)** Create a substantial risk of loss, damage, or interruption of services or a substantial threat to property, public health, welfare, or safety; and
- **(c)** Require prompt execution of a Contract to remedy the condition.

(31) Emergency Procurement means a sourcing method pursuant to ORS 279B.080.

(32) Energy Savings Performance Contract means a Public Contract between the District and a Qualified Energy service Company for the identification, evaluation, recommendation, design, and construction of Energy Conservation Measures, including a Design-Build Contract, that guarantee energy savings or performance.

(33) Engineer is defined in ORS 279C.100 and means a Person who is registered and holds a valid certificate in the practice of engineering in the State of Oregon, as provided under ORS 672.002 through 672.325, and includes all terms listed in ORS 672.002(2).

(34) Facsimile means an exact reproduction or copy of graphic or verbal material converted into electrical signals that are transmitted via telephone to produce a paper copy of the material on the receiving fax machine.

(35) Federal Award is defined in 2 CFR §200.38 and means, depending on the context, in either paragraph (a) or (b) of this section:

(a)

(i) The Federal financial assistance that that the District receives directly from a Federal awarding agency or indirectly from a pass-through entity, as described in 2 CFR §200.101 Applicability (such as the State of Oregon); or

(ii) The cost-reimbursement contract under the Federal Acquisition Regulations that the District receives directly from a Federal awarding agency or indirectly from a pass-through entity, as described in 2 CFR §200.101 (Applicability).

(b) The instrument setting forth the terms and conditions. The instrument is the grant agreement, cooperative agreement, other agreement for assistance covered in paragraph (b) of 2 CFR §200.40 (Federal financial assistance), or the cost-reimbursement contract awarded under the Federal Acquisition Regulations.

(c) "Federal award" does not include other contracts that a Federal agency uses to buy goods or services from a contractor or a contract to operate Federal government owned, contractor operated facilities (GOCOs).

(36) Findings is defined in ORS 279C.330 and means the justification for an exemption from competitive Bidding for a Contract for a Public Improvement that includes, but is not limited to, information regarding:

(a) Operational, budget, and financial data;

(b) Public benefits;

(c) Value engineering;

(d) Specialized expertise required;

(e) Public safety;

(f) Market conditions;

(g) Technical complexity; and

(h) Funding sources.

(37) Flexible Services Contractor Pool or **FSCP** is a list of qualified contractors determined pursuant to a Request for Qualifications or other method of competitive solicitation with whom the Superintendent may enter into a Contract as provided for in these rules.

(38) Fringe Benefits is defined in ORS 279C.800 and means the amount of:

(a) The rate of contribution irrevocably made by a Contractor or subcontractor to a trustee or to a third person under a plan, fund, or program; and

(b) The rate of costs to the Contractor or subcontractor that may be reasonably anticipated in providing benefits to workers pursuant to an enforceable commitment to carry out a financially responsible plan or program that is committed in writing to the workers affected, for medical or hospital care, pensions on retirement or death, compensation for injuries or illness resulting from occupational activity, or insurance to provide any of the foregoing, for unemployment benefits, life insurance, disability and sickness insurance, or accident insurance, for vacation and holiday

pay, for defraying costs of apprenticeship or other similar programs, or for other bona fide Fringe Benefits, but only when the Contractor or subcontractor is not required by other federal, state, or local law to provide any of these benefits.

(39) Good-Faith Dispute is defined in ORS 279C.580 and means a documented dispute concerning:

(a) Unsatisfactory job progress;

(b) Defective Work not remedied;

(c) Third-party claims filed or reasonable evidence that claims will be filed;

(d) Failure to make timely payments for labor, equipment, and materials;

(e) Damage to the prime Contractor or subcontractor; or

(f) Reasonable evidence that the subcontract cannot be completed for the unpaid balance of the subcontract sum.

(40) Goods is defined in ORS 279A.010(1)(i) and means supplies, equipment, materials, and personal property, including any tangible, intangible, and intellectual property and rights and licenses in relation thereto, and combinations of any of the items identified herein.

(41) Goods and Services or **Goods or Services** is defined in ORS 279A.010(1)(j) and means any combinations of any of the items identified in the definitions of "goods" and "services."

(42) Grant is defined in ORS 279A.010(k) and means:

(a) An agreement under which the District receives money, property, or other assistance including, but not limited to, federal assistance that is characterized as a Grant by federal law or regulations, loans, loan guarantees, credit enhancements, gifts, bequests, commodities, or other assets, from a grantor for the purpose of supporting or stimulating a program or activity of the District and in which no substantial involvement by the grantor is anticipated in the program or activity other than involvement associated with monitoring compliance with the Grant conditions; or

(b) An agreement under which the District provides money, property, or other assistance including, but not limited to, federal assistance that is characterized as a Grant by federal laws or regulations, loans, loan guarantees, credit enhancements, gifts, bequests, commodities, or other assets, to a recipient for the purpose of supporting or stimulating a program or activity of the recipient, and in which no substantial involvement by the District is anticipated in the program or activity other than involvement associated with monitoring compliance with the Grant conditions.

(c) Grant does not include a Public Contract:

(A) For a Public Improvement or Public Works, as defined in ORS 279C.800, or

(B) For Emergency Work, minor alterations, or ordinary repair or maintenance necessary to preserve a Public Improvement, when under the Public Contract:

(i) The District pays moneys that the District has received under a Grant, and

(ii) Such payment is made in consideration for Contract performance intended to realize or to support the realization of the purposes for which Grant funds were provided to the District.

(43) Interstate Cooperative Procurement is defined in ORS 279A.200 and means a Permissive Cooperative Procurement in which the Administering Contracting Agency is a governmental body, domestic or foreign, that is authorized under the governmental body's laws, rules, or regulations to enter into Public

Contracts and in which one or more of the participating governmental bodies are located outside of their state.

(44) Invitation to Bid or **ITB** means the Solicitation Document issued to invite Offers from prospective Contractors under either ORS 279B.055 or 279C.335.

(45) Joint Cooperative Procurement is defined in ORS 279A.200 and means a Cooperative Procurement that identifies:

(a) The participating governmental bodies or the Cooperative Procurement Group;

(b) The Contract requirements or estimated Contract requirements for Price Agreements.

(46) Land Surveyor is defined in ORS 279C.100(4) and means a Person who is registered and holds a valid certificate in the practice of land surveying in the State of Oregon as provided under ORS 672.002 through 672.325, and includes all terms listed in ORS 672.002(5).

(47) Life Cycle Cost means the total cost to the District of acquiring, operating, supporting, and (if applicable) disposing of the items being acquired.

(48) Life-Cycle Costing means the various quantifiable cost factors, in addition to the acquisition cost of goods or services (also referred to in this rule as "product, equipment, and service, separately or in any combination thereof").

(49) Locality is defined in ORS 279C.800 and means the following district in which the Public Works, or the major portion thereof, is to be performed: District 2, composed of Clackamas, Multnomah, and Washington Counties.

(50) Lowest Responsible Bidder means the lowest bidder who:

(a) Has substantially complied with all prescribed Public Contracting procedures and requirements;

(b) Has met the standards of responsibility set forth in ORS 279B.110 or 279C.375;

(c) Has not been Debarred or disqualified by the District under ORS 279B.130 or 279C.440; and

(d) Is not on the list created by the Oregon Construction Contractors Board under ORS 701.227, if the advertised Contract is a Public Improvement Contract.

(51) Model Rules means the Attorney General's Model Rules of Procedure for Public Contracting as required under ORS 279A.065.

(52) Nonprofit Procurement Organization means a local, state, or national organization formed as a tax-exempt entity under the United States Internal Revenue Code for the purpose of conducting large-scale or volume-competitive procurements as an agent for its governmental and/or nonprofit members in order to obtain the most favorable pricing or terms.

(53) Nonresident Bidder is defined in ORS 279A.120 and means a bidder who is not a resident bidder.

(54) OAR means the Oregon Administrative Rules.

(55) Offer means a written offer to provide goods or services in response to a Solicitation Document.

(56) Offeror means a Person who submits an Offer.

(57) Opening means the date, time, and place specified in the Solicitation Document for the public opening of Offers.

(58) ORS means the Oregon Revised Statutes.

(59) Original Contract is defined in ORS 279A.200(f) and means the initial Contract or Price Agreement solicited and awarded during a Cooperative Procurement by an Administering Contracting Agency.

(60) Permissive Cooperative Procurement is defined in ORS 279A.200 and means a Cooperative Procurement in which the Purchasing Contracting Agencies are not identified.

(61) Person means any of the following with legal capacity to enter into a Contract: individual, corporation, business trust, estate, trust, partnership, limited liability company, association, joint venture, governmental agency, public corporation, or any other legal or commercial entity.

(62) Personal Services means the services or type of services performed under a Personal services Contract as defined in PPS 46-0500.

(63) Personal Services Contract or **PSC** is a Contract primarily for Personal services as designated in these rules. Personal services contract does not include a Contract for the services of an Architect, Engineer, Land Surveyor or Provider of Related Services (as defined in ORS 279C.100).

(64) Prevailing Rate of Wage is defined in ORS 279C.800 and means the rate of hourly wage, including all Fringe Benefits, paid in the Locality to the majority of workers employed on projects of similar character in the same trade or occupation, as determined by the Commissioner of the Bureau of Labor and Industries.

(65) "Price Agreement means a Public Contract for the procurement of goods or services at a set price with:

(a) No guarantee of a minimum or maximum purchase; or

(b) An initial order or minimum purchase combined with a continuing Contractor obligation to provide goods or services in which the District does not guarantee a minimum or maximum additional purchase.

(66) Procurement is defined in ORS 279A.010(1)(w) and means the act of purchasing, leasing, renting, or otherwise acquiring goods or services. Procurement includes each function and procedure undertaken or required to be undertaken by the District to enter into a Public Contract, administer a Public Contract, and obtain the performance of a Public Contract under the Public Contracting Code.

(67) Procurement Description is defined in ORS 279B.005(1)(b) and means the words used in a solicitation to describe the goods or services to be procured. "Procurement Description" includes specifications attached to or made a part of the Solicitation.

(68) Product Sample means the exact goods or a representative portion of the goods offered in an Offer, or the goods requested in the Solicitation Documents as a sample.

(69) Proposal means a written response to a Request for proposal.

(70) Proposer means a Person who submits a proposal in response to a Request for proposal.

(71) Public Agency is defined in ORS 279C.800(5) and means the State of Oregon or any political subdivision thereof, or any county, city, district, authority, public corporation, or entity, and any instrumentality thereof organized and existing under law or charter.

(72) Public Body is defined in ORS 279A.010(1)(y) and has the meaning given that term in ORS 174.109.

(73) Public Contracting is defined in ORS 279A.010(1)(aa) and means procurement activities described in the Public Contracting Code relating to obtaining, modifying, or administering Public Contracts or Price Agreements.

(74) Public Improvement is defined in ORS 279A.010 and means a project for construction, reconstruction, or major renovation on real property by or for the District. "Public Improvement" does not include:

(a) Projects for which no funds of the District are directly or indirectly used, except for participation that is incidental or related primarily to project design or inspection; or

(b) Emergency Work, minor alteration, or ordinary repair or maintenance necessary to preserve a Public Improvement.

(75) Public Improvement Contract means a Public Contract for a Public Improvement. "Public Improvement Contract" does not include a Public Contract for Emergency Work, minor alterations, or ordinary repair or maintenance necessary to preserve a Public Improvement.

(76) (a) Public Works is defined in ORS 279C.800 and includes, but is not limited to:

(A) Roads, highways, buildings, structures, and improvements of all types, the construction, reconstruction, major renovation, or painting of which is carried on or contracted for by any Public Agency to serve the public interest;

(B) A project that uses $750,000 or more funds of a public agency for constructing, reconstructing, painting or performing a major renovation on a road, highway, building, structure, or improvement of any;

(C) A project that uses funds of private entity for construction a privately owned road, highway, building, structure, or improvement of any type a public agency will use or occupy 25 percent or more of the square footage of the completed project;

(D) Notwithstanding the provisions of ORS 279C.810 (Exemptions) (2)(a), (b) and (c), a device, structure or mechanism, or a combination of devices, structures or mechanisms, that:

(i) Uses solar radiation as a source for generating heat, cooling or electrical energy; and

(ii) Is constructed or installed, with or without using funds of a public agency, on land, premises, structures or buildings that a public body, as defined in ORS 174.109 ("Public body" defined), owns; or

(E) Notwithstanding paragraph (b)(A) of this subsection and ORS 279C.810 (Exemptions) (2)(b) and (c), construction, reconstruction, painting or major renovation of a road, highway, building, structure or improvement of any type that occurs, with or without using funds of a public agency, on real property that a public university listed in ORS 352.002 (Public universities) owns.

(b) Public Works does not include:

(A) Reconstructing or renovating privately owned property that a public agency leases; or

(B) A private nonprofit entity's renovation of publicly owned real property that is more than 75 years old if:

(i) The real property is leased to the private nonprofit entity for more than 25 years;

(ii) Funds of a Public Agency used in the renovation do not exceed 15 percent of the total cost of the renovation; and

(iii) Contracts for the renovation were advertised or, if not advertised, were entered into before July 1, 2003, but the renovation has not been completed on or before July 13, 2007.

(77) Purchase Order means the District's document to formalize a purchase transaction with a Provider. Acceptance of a Purchase Order constitutes a Public Contract. The District's use of a Purchase Order shall comply with the Public Contracting Code and these rules.

(78) Purchasing Contracting Agency is defined in ORS 279A.200(1)(h) and means a governmental body that procures goods, services, or Public Improvements from a Contractor based on the Original Contract established by an Administering Contracting Agency.

(79) QBS means the qualifications-based selection process mandated by ORS 279C.110 for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services and Related services Contracts under certain circumstances.

(80) Recycled Materials means recycled paper (as defined in ORS 279A.010(1)(gg)), recycled PETE products (as defined in ORS 279A.010(1)(hh)), and other recycled plastic resin products and recycled products (as defined in ORS 279A.010(1)(ii)).

(81) Recycled Product is defined in ORS 279A.010(1)(ii) and means all materials, goods, and supplies, not less than 50 percent of the total weight of which consists of secondary and post-consumer waste, with not less than 10 percent of its total weight consisting of Post-consumer Waste. "Recycled Product" includes any product that could have been disposed of as solid waste, having completed its life cycle as a consumer item, but otherwise is refurbished for reuse without substantial alteration of the product's form.

(82) Request for Proposal or **RFP** is defined in ORS 279B.005 and means all documents, either attached or incorporated by reference, and any Addenda thereto, used for soliciting Proposals in accordance with either ORS 279B.060 or 279C.405 and related rules.

(83) Request for Qualifications or **RFQ** means a written document issued by the District to which Contractors respond in writing by describing their experience with and qualifications for the services, Personal services, or Architectural, Engineering or Land Surveying services, or Related services, described in the solicitation document.

(84) Request for Quotes means a written or oral request for prices, rates, or other conditions under which a potential Contractor would provide goods or perform services, Personal services, or Public Improvements described in the request.

(85) Responsible means meeting the standards set forth in PPS 47-0640 or 49-0390(2), and not Debarred or disqualified by the District under PPS 47-0575 or 49-0370.

(86) Resident Bidder is defined in ORS 279A.120 and means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the Bid, has a business address in this state, and has stated in the bid whether the bidder is a "Resident bidder."

(87) Responsible Offeror means a Person who has submitted an Offer and met the standards set forth in PPS 47-0500 or PPS 49-0390(2), and who has not been Debarred or disqualified by the District under PPS 47-0575 or 49-0370, respectively. When used alone, "Responsible" means meeting the aforementioned standards.

(88) Responsive means having the characteristic of substantial compliance in all material respects with applicable solicitation requirements.

(89) Responsive Offer means, as the context requires, a Responsive Bid, Responsive Proposal or other Offer that substantially complies in all material respects with applicable solicitation requirements.

(90) Retainage is defined in ORS 279C.550 and means the difference between the amount earned by a Contractor on a Public Contract and the amount paid on the Contract by the District.

(91) Revenue Contract means a Contract where the District is providing goods or services to another party for compensation. Revenue Contracts are typically intergovernmental agreements with other education or education-related social service providers, or Contracts with other community partners in furtherance of the District's educational mission.

(92) School Board means the District Board of Directors acting as the governing body of the District pursuant to ORS chapter 332.

(93) Secondary Waste Content or **Secondary Waste Materials** is defined in ORS 279A.010(1)(jj) and means fragments of products or finished products of a manufacturing process that has converted a virgin resource into a commodity of real economic value. "Secondary Waste Materials" includes post-consumer waste. "Secondary Waste Materials" does not include excess virgin resources of the manufacturing process. For paper, "Secondary Waste Materials" does not include fibrous waste generated during the manufacturing process, such as fibers recovered from waste water or trimmings of paper machine rolls, mill broke, wood slabs, chips, sawdust, or other wood residue from a manufacturing process.

(94) Services is defined in ORS 279A.010(1) and means services other than Personal services designated under PPS 46-0500 and ORS 279A.055.

(95) Signature means any written mark, word, or symbol that is made or adopted by a Person with the intent to be bound and that is attached to or logically associated with a written document to which the Person intends to be bound.

(96) Signed means, as the context requires, that a written document contains a signature or that the act of making a signature has occurred.

(97) Solicitation Document means an Invitation to Bid, a Request for proposals, Request for quotes, or other similar document issued to invite Offers from prospective Contractors under ORS chapter 279B or 279C. The following are not "Solicitation Documents" unless they invite Offers from prospective Contractors: a Request for Qualifications, a prequalification of bidders, a request for information, a sole-source notice, an approval of a Special procurement, or a request for product prequalification. A project-specific selection document under a Price Agreement that has resulted from a previous Solicitation Document is not itself a Solicitation Document.

(98) Solicitation file is a physical or electronic file containing documents relating to a specific procurement or procurements that is maintained in the District's procurement Division or in another District department or division that is responsible for the procurement.

(99) Specifications means, with respect to goods or services, any description of the physical or functional characteristics of, or of the nature of, goods or services to be procured by the District, including any requirement for inspecting, testing, or preparing goods or services for delivery and the quantities or qualities of materials to be furnished under the Contract. See ORS 279B.200(3). With respect to Public Improvements, "specifications" generally means any description of the result to be obtained and may, on occasion, describe the method and manner of doing the work to be performed.

(100) Superintendent means the District Superintendent or the Superintendent's designee.

(101) Uniform Guidance means 2 CFR Part 200—Uniform Administrative Requirements, Cost Principals, and Audit Requirements for Federal awards. The Uniform Guidance applies to all District Contracts funded in whole or in part by Federal award.

(102) :

(a) **Veteran** means an individual who Served on active duty with the Armed Forces of the United States:

(A) For a period of more than 90 consecutive days beginning on or before January 31, 1955, and was discharged or released under honorable conditions;

(B) For a period of more than 178 consecutive days beginning after January 31, 1955, and was discharged or released from active duty under honorable conditions;

(C) For 178 days or less and was discharged or released from active duty under honorable conditions because of a service-connected disability;

(D) For 178 days or less and was discharged or released from active duty under honorable conditions and has a disability rating from the United States Department of Veterans Affairs; or

(E) For at least one day in a combat zone and was discharged or released from active duty under honorable conditions;

(i) Received a combat or campaign ribbon or an expeditionary medal for service in the Armed Forces of the United States and was discharged or released from active duty under honorable conditions;

(ii) Is receiving a nonservice-connected pension from the United States Department of Veterans Affairs;

(iii) Is a disabled veteran, as defined in ORS 408.225; or

(iv) Has been a reserve officer or member of a National Guard unit for at least five years before the individual seeks a certification under ORS 200.055.

(b) As used in paragraph (a) of this subsection, “active duty” does not include attendance at a school under military orders, except schooling incident to an active enlistment or a regular tour of duty, or normal military training as a reserve officer or member of an organized reserve or a National Guard unit.

(103) Work means the furnishing of all materials, equipment, labor, and incidentals necessary to successfully complete any individual item or the entire Contract, and successful completion of all duties and obligations imposed by the Contract.

(104) Writing means letters, characters, and symbols inscribed on paper by hand, print, type, or other method of impression, intended to represent or convey particular ideas or meanings. "Writing," when required or permitted by law, or required or permitted in a Solicitation Document, also means letters, characters, and symbols made in electronic form and intended to represent or convey particular ideas or meanings.

(105) Written means existing in writing.

PPS 46-0120 Policy

The District shall conduct Public Contracting to further the policies set forth in ORS 279A.015, elsewhere in the Code, and in these rules.

PPS 46-0130 Application of the Code and Rules; Exceptions

(1) Except as set forth in this section, the District shall exercise all rights, powers, and authority related to Public Contracting in accordance with the Public Contracting Code and these rules.

(2) The District may make a procurement without competitive sealed bidding, competitive sealed Proposals, or other competition required under ORS 279B.050 through 279B.085 or PPS 47-0255 through 47-0670, provided the procurement is made under 10 U.S.C. 381, the Electronic Government Act of 2002 (P.L. 107-347), or other federal law that is, as determined by the Local Contract Review Board, similar to 10 U.S.C. 381 or section 211 of the Electronic Government Act of 2002, in effectuating or promoting transfers of property to the District.

(3) Except as expressly provided herein, these rules do not apply to the Contracts or classes of Contracts described in ORS 279A.025(2), including the following District Contracts:

(a) Contracts between the District and:

(A) Another Contracting Agency;

(B) The Oregon Health and Science University;

(C) A public university listed in ORS 352.002;

(D) The Oregon State Bar;

(E) A governmental body of another state;

(F) The federal government;

(G) An American Indian tribe or an agency of an American Indian tribe;

(H) A nation, or a governmental body in a nation, other than the United States; or

(I) An intergovernmental entity formed between or among:

(i) Governmental bodies of this or another state;

(ii) The federal government;

(iii) An American Indian tribe or an agency of an American Indian tribe;

(iv) A nation other than the United States; or

(v) A governmental body in a nation other than the United States.

(b) Agreements authorized by ORS chapter 190 or by a statute, charter provision, ordinance, or other authority for establishing agreements between or among governmental bodies or agencies or tribal governing bodies or agencies;

(c) Insurance and service Contracts as provided for under ORS 414.115, 414.125, 414.135, and 414.145 for purposes of source selection;

(d) Grants;

(e) Contracts for professional or expert witnesses or Consultants to provide services or testimony relating to existing or potential litigation or legal matters in which a Public Body is or may become interested;

(f) Acquisitions or disposals of real property or interest in real property;

(g) Sole-source expenditures when rates are set by law or ordinance for purposes of source selection;

(h) Contracts for the procurement or distribution of textbooks;

(i) Procurements by the District from an Oregon Corrections Enterprises program;

(j) Contracts, agreements, or other documents entered into, issued, or established in connection with:

(A) The issuance of obligations, as defined in ORS 286A.100 and 287A.310, of a Public Body;

(B) Program loans and similar extensions or advances of funds, aid, or assistance that a Public Body makes to a public or private body for the purpose of carrying out, promoting, or sustaining activities or programs authorized by law; or

(C) The investment of funds by a Public Body as authorized by law, and other financial transactions of a Public Body that by their character cannot practically be established under the competitive Contractor selection procedures of ORS 279B.050 through 279B.085;

(k) Contracts for employee benefit plans as provided in ORS 243.105 (1), 243.125 (4), 243.221, 243.275, 243.291, 243.303, and 243.565;

(l) Contracts for employee benefit plans as provided in ORS 243.860 through 243.886; or

(m) Any other Public Contracting of a Public Body specifically exempted from the Code by another provision of law.

(4) Rules adopted to implement ORS 279A.200 to 279A.225 and 279B.050 to 279B.085 do not apply to Contracts made with qualified non-profit agencies providing employment opportunities for individuals with disabilities under ORS 279.835 through 279.855.

MINORITIES, WOMEN, AND EMERGING SMALL BUSINESSES

PPS 46-0210 Subcontracting to and Contracting With Emerging Small Businesses; Disqualification

(1) For the purposes of ORS 279A.105, a subcontractor certified under ORS 200.055 as an emerging small business is located in or draws its workforce from economically distressed areas if:

(a) Its principal place of business is located in an area designated as economically distressed under administrative rules adopted by the Oregon Business Development Department; or

(b) The Contractor certifies in a signed writing to the District that a substantial number of the subcontractor's employees, or subcontractors that will manufacture or provide the goods or perform the services or Personal services under the Contract reside in an area designated as economically distressed under administrative rules adopted by the Oregon Business Development Department. For the purposes of making the foregoing determination, the District shall determine in each particular instance what proportion of a Contractor's or subcontractor's employees or subcontractors constitutes a substantial number.

(2) The District shall include in each Solicitation Document a requirement that Offerors certify in their Offers, in a form prescribed by the District, that the Offeror has not discriminated and will not discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a women-owned business, an emerging small business or a veteran-owned business.

(3) Disqualification.

(a) The District may disqualify a Person from consideration for award of the District's Contracts under ORS 200.065(5), or suspend a Person's right to bid on or participate in any Contract under ORS 200.075(1), after providing the Person with notice and a reasonable opportunity to be heard in accordance with Sections (4)(b) and (c) of this rule.

(b) The District shall provide written notice to the Person of a proposed Disqualification. The District shall deliver the written notice by personal service or by registered or certified mail, return receipt requested. This notice shall:

(A) State that the District intends to disqualify or suspend the Person;

(B) Set forth the reasons for the Disqualification;

(C) Include a statement of the Person's right to a hearing if requested in writing within the time stated in the notice and that if the District does not receive the Person's written request for a hearing within the time stated, the Person shall have waived its right to a hearing;

(D) Include a statement of the authority under which the hearing will be held;

(E) Include a reference to the particular sections of the statutes and rules involved;

(F) State the proposed Disqualification period; and

(G) State that the Person may be represented by legal counsel.

(c) Hearing. The District shall schedule a hearing upon the District's receipt of the Person's timely hearing request. Within a reasonable time prior to the hearing, The District shall notify the Person of the time and place of the hearing and provide information on the procedures, right of representation, and other rights related to the conduct of the hearing. The Contract Review Board may hold the hearing or may designate a hearings officer to conduct the hearing.

(d) Notice of Disqualification. The District shall provide written notice of the Disqualification to the Person. The District shall deliver the written notice by person service or by registered or certified mail, return receipt requested. The notice shall contain:

(A) The effective date and period of Disqualification;

(B) The grounds for Disqualification; and

(C) A statement of the Person's appeal rights and applicable appeal deadlines.

(4) Contract and Subcontract Conditions. If the District awards a Contract to an Offeror that has been determined to be responsible under ORS 200.005(8)[2] and 200.045(3),[3] or awards a Contract under ORS 279A.100:[4]

(a) The District shall provide, as a material condition of the Contract:

(A) That the Contractor shall maintain its certification under ORS 200.055 throughout the term of the Contract and any extensions (if the Contracting Agency used the certification as a factor in or as a basis for the award of the Contract);

(B) That the Contractor shall promptly pay each subcontractor that is certified under ORS 200.055 in accordance with ORS 279B.220, or ORS 279C.570 and 279C.580, whichever apply to the Contract;

(C) That the Contractor shall include, in any subcontract the Contractor establishes in connection with the Contract, a provision that requires the subcontractor to maintain the subcontractor's certification under ORS 200.055 throughout the term of the subcontract and any extensions (if the Contractor used the certification as a factor in or as a basis for the award of the subcontract);

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[2] A bidder or proposer that the Governor's Policy Advisor for Economic and Business Equity determines has undertaken both a policy and a practice of actively pursuing participation by minority-owned businesses, women-owned businesses, businesses that veterans own or emerging small businesses in all of the bidder's or proposer's bids or proposals, both public and private.

[3] A bidder or proposer has made good faith efforts to encourage required participants to participate by taking all of the actions list in ORS 200.045(3).

[4] An affirmative action program adopted under ORS 279A.100 for goods and services contracts or any other contract under $50,000.

(D) That the District may require the Contractor to terminate a subcontract with a subcontractor that fails to maintain its certification under ORS 200.055 throughout the term of the subcontract and any extensions.

(b) In the administration of Contracts that are subject to section (5) of this rule, the District shall verify the Contractor's and any subcontractor's compliance with Subsection (5)(a) of this rule.

(c) Subparagraph (4)(a)(A) of this section does not apply to an emerging small business that ceases to qualify as a tier one firm or a tier two firm (as ORS 200.005 defines those terms) due to the growth in the business's number of full-time equivalent employees or in average annual gross receipts during the term of the Contract. This section (5) does not apply to an emerging small business for which a certification under ORS 200.055 expires during the term of the Contract or any extensions.

CONTRACT PREFERENCES

PPS 46-0300 Preference for Oregon Goods or Services

(1) Tiebreaker Preference and Award When Offers Identical. Under ORS 279A.120, when the District receives Offers identical in price, fitness, availability, and quality and chooses to award a Contract, the District shall award the Contract based on the following order of precedence:

(a) The District shall award the Contract to the Offeror among those submitting identical Offers who is offering goods or services, or both, or Personal services that are manufactured, produced, or to be performed in Oregon.

(b) If two or more Offerors submit identical Offers and they all offer goods or services, or both, or Personal services, that are manufactured, produced, or to be performed in Oregon, the District shall award the Contract by drawing lots among the identical Offers. The District shall provide the Offerors who submitted the identical Offers notice of the date, time, and location of the drawing of lots, and an opportunity for these Offerors to be present when the lots are drawn.

(c) If the District receives identical Offers and none of the identical Offers offer goods or services, or both, or Personal services, that are manufactured, produced, or to be performed in Oregon, then the District shall award the Contract by drawing lots among the identical Offers. The District shall provide to the Offerors who submitted the identical Offers notice of the date, time, and location of the drawing of lots, and an opportunity for these Offerors to be present when lots are drawn.

(2) Determining if Offers Are Identical. The District shall consider Offers identical in price, fitness, availability, and quality as follows:

(a) Bids received in response to an Invitation to Bid are identical in price, fitness, availability, and quality if the Bids are Responsive and offer the goods or services, or both, or Personal services, described in the Invitation to bid at the same price.

(b) Proposals received in response to a Request for proposal are identical in price, fitness, availability, and quality if they are Responsive and achieve equal scores when scored in accordance with the evaluation criteria set forth in the Request for proposal.

(c) Offers received in response to a Special procurement conducted under ORS 279B.085 are identical in price, fitness, availability, and quality if, after completing the contracting procedure approved by the Contract Review Board, the District determines, in writing, that two or more Proposals are equally advantageous to the District.

(d) Offers received in response to an intermediate procurement conducted pursuant to ORS 279B.070 are identical if the Offers equally best serve the interests of the District in accordance with ORS 279B.070(4).

(3) Determining if Goods or Services or Personal Services Are Manufactured or Produced in Oregon. In applying section (1) of this rule, the District shall determine whether a Contract is predominantly for goods, services, or Personal services and then use the predominant purpose to determine if the goods, services, or Personal services are manufactured, produced, or performed in Oregon. The District may request, either in a Solicitation Document, following Closing, or at any other time the District determines is appropriate, any information the District may need to determine if the goods, services, or Personal services are manufactured or produced in Oregon. The District may use any reasonable criteria to determine if goods, services, or Personal services are manufactured, produced, or performed in Oregon, provided that the criteria reasonably relate to that determination, and provided that the District applies those criteria equally to each Offer.

(4) Procedure for Drawing Lots. When this rule calls for the drawing of lots, the District shall draw lots by a procedure that affords each Offeror subject to the drawing a substantially equal probability of selection and that does not allow the Person making the selection the opportunity to manipulate the drawing of lots to increase the probability of selecting one Offeror over another.

(5) Discretionary Preference and Award. Under ORS 279A.128, the District may provide, in a Solicitation Document for goods, services, or Personal services, a specified percentage preference of not more than 10 percent for (i) goods fabricated or processed entirely in Oregon or services or Personal services performed entirely in Oregon or (ii) for goods or services provided by a benefit company that is incorporated, organized, formed or created under ORS 60.754 and has the majority of the benefit company's regular, full-time workforce located in this state, if the goods or services cost not more than five percent more than the goods or services available from a contractor that is not a benefit company. When the District provides for a preference under this section and more than one Offeror qualifies for the preference, the District may give a further preference to a qualifying Offeror that resides in or is headquartered in Oregon. The District may establish a preference percentage higher than 10 percent by written order that finds Good Cause to establish the higher percentage and that explains the District's reasons and evidence for finding Good Cause to establish a higher percentage. The District may not apply the preferences described in this section in a procurement for Emergency Work, minor alterations, ordinary repairs or maintenance of public improvements, or construction Work that is described in ORS 297C.320.

PPS 46-0310 Reciprocal Preferences

(1) When evaluating Bids pursuant to PPS 47-0255 through 47-0257, 49-0390, or PPS 49-0640 through 49-0660, the District shall add a percentage increase to the Bid of a Nonresident bidder equal to the percentage, if any, of the preference that would be given to that bidder in the state in which the bidder resides. The District may rely on the list prepared and maintained by the Oregon Department of Administrative services pursuant to ORS 279A.120(4) to determine whether the Nonresident bidder's state gives preference to in-state bidders and the amount of such preference.

PPS 46-0320 Preference for Recycled Materials

(1) Notwithstanding provisions of law requiring the District to award a Contract to the lowest or best Offeror, and in accordance with section (2) of this rule, the District may give preference to the procurement of goods manufactured from Recycled Materials whenever the District uses competitive sealed bidding or competitive sealed Proposals and as set forth in this rule.

(2) In comparing goods from two or more Offerors, if at least one Offeror Offers goods manufactured from Recycled Materials and at least one Offeror does not, the District may select the Offeror offering goods manufactured from Recycled Materials if each of the following four conditions exists:

(a) The Recycled Product is available;

(b) The Recycled Product meets applicable standards;

(c) The Recycled Product can be substituted for a comparable non-recycled product; and

(d) The Recycled Product's costs do not exceed the costs of non-recycled products by more than 5 percent, or a higher percentage if a written determination is made by the District and set forth in the Solicitation Document. For purposes of making the foregoing determination, the District shall consider the costs of the goods following any adjustments the District makes to the price of the goods for purposes of evaluation pursuant to PPS 46-0310.

(3) Offerors shall certify in their Offers:

(a) The minimum, if not exact, percentage of Recycled Product in all materials and supplies offered; and

(b) Both the post-consumer and Secondary Waste Content thereof.

(4) To be eligible for a preference under ORS 279A.125 and this rule:

(a) The Offeror shall indicate which materials and supplies contain verifiable recycled content; and

(b) Such products shall meet the requirements of ORS 279A.125 and this rule.

(5) A preference under ORS 279A.125 will only be applied to those products in the Offer that contain verifiable recycled content.

(6) Offers that contain false information about (a) the percentage of Recycled Product, post-consumer, and Secondary Waste Content or (b) verifiable recycled content, shall be rejected as non-responsive, and the Offeror offering false information may be deemed non-responsible.

PPS 46-0330 Solicitations and Specifications to Comply With School Board Environmental and Sustainability Policies.

The District shall develop specifications for and procure goods, services, and Public Improvements in compliance with the applicable School Board environmental and sustainability policies, including, but not limited to Board Policy 3.30.080-P (Resource Conservation), 3.30.082-P (Environmentally Sustainable Business Practices), and 8.80.010-P (High Performance Facility Design), and related Administrative Directives adopted by the Superintendent.

COOPERATIVE PROCUREMENT

PPS 46-0400 Authority for Cooperative Procurements

(1) The District may participate in, sponsor, conduct, or administer any of the following:

(a) Joint Cooperative Procurements to establish Original Contracts or Contracts for the acquisition of goods or services using a source-selection method substantially equivalent to those set forth in ORS 279B.055, 279B.060, or 279B.085, or to establish Original Contracts or Contracts for Public Improvements that use a competitive Bidding process substantially equivalent to that set forth in ORS 279C.005 through 279C.870.

(b) Permissive Cooperative Procurements to establish Original Contracts or Contracts for the acquisition of goods or services only, using a source-selection method substantially equivalent to those set forth in ORS 279B.055 or 279B.060.

(c) Interstate Cooperative Procurements to establish Original Contracts or Contracts for the acquisition of goods or services only, using a source selection method substantially equivalent to those set forth in ORS 279B.055 or 279B.060.

(2) The District shall determine, in writing, whether the Solicitation and award process for an Original Contract arising out of a Cooperative Procurement is substantially equivalent to those identified in ORS 279B.055, 279B.060, or 279B.085 in accordance with ORS 279A.200(2). This written documentation shall be maintained in the District's Solicitation file.

PPS 46-0410 Responsibilities of Administering Contracting Agencies and Purchasing Contracting Agencies

(1) If the District is an Administering Contracting Agency of a Cooperative Procurement, the District may establish the conditions under which Persons may participate in the Cooperative Procurement administered by the District. Such conditions may include, without limitation, whether each Person who participates in the Cooperative Procurement shall pay administrative fees to the Administering Contracting Agency, whether each Person shall enter into a written agreement with the District, and any other matters related to the administration of the Cooperative Procurement and the resulting Original Contract. When acting as an Administering Contracting Agency, the District may, but is not required to, include provisions in the Solicitation Document for a Cooperative Procurement and advertise the Solicitation Document in a manner to assist Purchasing Contracting Agencies' compliance with the Code or these rules.

(2) If the District is acting as a Purchasing Contracting Agency and enters into a Contract based on a Cooperative Procurement, the District shall comply with the Code and these rules, including, without limitation, those sections of the Code and these rules that govern:

- **(a)** The extent to which the Purchasing Contracting Agency may participate in the Cooperative Procurement;
- **(b)** The advertisement of the Solicitation Document related to the Cooperative Procurement; and
- **(c)** Public notice of the Purchasing Contracting Agency's intent to establish Contracts based on a Cooperative Procurement.

PPS 46-0420 Joint Cooperative Procurements

(1) **Applicability**. The District may participate in, sponsor, conduct, or administer a Joint Cooperative Procurement for the purchase of goods or services or Public Improvements. The District shall comply with the procedures set out in ORS 279A.210 and these rules to procure goods or services or Public Improvements using a Joint Cooperative Procurement. Only the Participating agencies listed in the Solicitation and original Contract Documents may enter into a Contract through a Joint Cooperative Procurement. A Joint Cooperative Procurement may not be a Permissive Cooperative Procurement.

(2) **Solicitation Requirements**. The District may administer or participate in a Joint Cooperative Procurement only if:

- **(a)** The Administering Contracting Agency's solicitation and award process for the Original Contract is an open and impartial competitive process and uses source-selection methods substantially equivalent to those specified in ORS 279B.055, 279B.060, or 279B.085, or uses a competitive Bidding process substantially equivalent to the competitive Bidding process in ORS 279C;
- **(b)** The Administering Contracting Agency's solicitation and the Original Contract or Price Agreement identifies the Cooperative Procurement Group or each participating Purchasing Contracting Agency and specifies the estimated Contract requirements; and
- **(c)** No material change is made in the terms, conditions, or prices of the Contract between the Contractor and the Purchasing Contracting Agency from the terms, conditions, and prices of the Original Contract between the Contractor and the Administering Contracting Agency.

PPS 46-0430 Permissive Cooperative Procurements

(1) Applicability. The District may only participate in, sponsor, conduct, or administer a Permissive Cooperative Procurement for the purchase of goods or services, but not for Public Improvements. The District shall comply with the procedures set out in ORS 279A.215 and these rules to procure goods or services using a Permissive Cooperative Procurement. A Permissive Cooperative Procurement is not a Joint Cooperative Procurement.

(2) Solicitation Requirements. The District may establish or participate in a Contract or Price Agreement through a Permissive Cooperative Procurement only if:

(a) The Administering Contracting Agency's solicitation and award process for the Original Contract is an open and impartial competitive process and uses source-selection methods substantially equivalent to those specified in ORS 279B.055 or 279B.060;

(b) The Administering Contracting Agency's solicitation and the Original Contract allow other Contracting Agencies to establish Contracts or Price Agreements under the terms, conditions, and prices of the Original Contract;

(c) The Contractor agrees to extend the terms, conditions, and prices of the Original Contract to the Purchasing Contracting Agency; and

(d) No material change is made in the terms, conditions, or prices of the Contract or Price Agreement between the Contractor and the Purchasing Contracting Agency from the terms, conditions, and prices of the Original Contract between the Contractor and the Administering Contracting Agency.

PPS 46-0440 Required Public Notice if Permissive Cooperative Procurement Is Over $250,000

(1) The District shall publish a notice of its intent to enter into a Contract through a Permissive Cooperative Procurement if the District estimates that it will spend in excess of $250,000 for the purchase of the goods or services to be acquired under the Contract.

(2) For purposes of determining if the District shall give a notice of intent, the District shall spend in excess of $250,000 for goods or services procured under the Contract if:

(a) The District intends to make payments, in aggregate, over the term of the Contract in excess of $250,000, whether or not the total amount or value of the payments is expressly stated in the Contract;

(b) The District's Contract expressly provides for payment, whether a fixed or maximum price, in excess of $250,000; or

(c) At the time the District enters into the Contract, the District reasonably contemplates, based on historical or other data available to the District, that the total payments it will make for the goods or services, or Personal services, under the Contract will, in aggregate, exceed $250,000 over the anticipated duration of the Contract.

(3) The notice of intent shall contain the following information:

(a) A description of the procurement;

(b) An estimated amount of the procurement;

(c) The name of the Administering Contracting Agency, and

(d) A time, place, and date by which comments shall be submitted to the District regarding the notice of intent to establish a Contract or Price Agreement through the Permissive Cooperative Procurement.

(4) The notice shall be published:

(a) At least once in at least one newspaper of general circulation in the District or electronically in the same manner as the District publishes electronic notices of Invitations to Bid or Requests for Proposals; and

(b) No fewer than seven days before the deadline for submission of comments regarding the notice of intent to establish a Contract or Price Agreement through a Permissive Cooperative Procurement.

(5) Vendors shall submit comments within seven days after the notice of intent is published.

(6) If the District receives comments on its intent to establish a Contract, the District shall, prior to establishing a Contract or Price Agreement:

(a) Make a written determination that establishing a Contract is in the best interest of the District.

(b) Provide a copy of the written determination to all vendors that submitted comments.

PPS 46-0450 Interstate Cooperative Procurements

(1) Applicability. The District may only participate in an Interstate Cooperative Procurement for the purchase of goods or services pursuant to ORS 279A.220 and these rules to procure goods or services, but not Public Improvements.

(2) Solicitation Requirements. The District may establish a Contract or Price Agreement through an Interstate Cooperative Procurement only if:

(a) The Administering Contracting Agency's solicitation and award process for the Original Contract is an open and impartial competitive process and uses source selection methods substantially equivalent to those specified in ORS 279B.055 or 279B.060;

(b) The Administering Contracting Agency's solicitation and the Original Contract allows other governmental bodies to establish Contracts or Price Agreements under the terms, conditions, and prices of the Original Contract; and

(c) The Administering Contracting Agency permits the Contractor to extend the use of the terms, conditions, and prices of the Original Contract to the Purchasing Contracting Agency.

PPS 46-0460 Advertisements of Interstate Cooperative Procurements

The District may only participate in an Interstate Cooperative Procurement if at least one of the following occurs:

(1) The Solicitation Document for the Interstate Cooperative Procurement lists the District, or the Cooperative Procurement Group of which the District is a member, as a party that may establish Contracts or Price Agreements under the terms, conditions, and prices of the Original Contract, and the Solicitation Document is advertised in Oregon in compliance with ORS 279B.055(4) or 279B.060(4) by:

(a) The Administering Contracting Agency;

(b) The District;

(c) The Cooperative Procurement Group, or a member of the Cooperative Procurement Group of which the District is a member; or

(d) Another Purchasing Contracting Agency that is subject to the Code, so long as such advertisement would, if given by the Purchasing Contracting Agency, comply with ORS 279B.055(4) or 279B.060(4) with respect to the Purchasing Contracting Agency.

(2) If the Solicitation Document issued by the Administering Contracting Agency was not advertised in accordance with PPS 46-0460(1), the District gives notice of its intent to enter into a Public Contract or Price Agreement based on the terms of the Interstate Cooperative Procurement.

(a) The notice of intent shall contain the following information:

(A) A description of the procurement;

(B) An estimated amount of the procurement;

(C) The name of the Administering Contracting Agency, and;

(D) A time, place, and date by which comments shall be submitted to the District regarding the notice of intent to establish a Contract or Price Agreement through the Interstate Cooperative Procurement.

(b) The notice shall be published:

(A) At least once in at least one newspaper of general circulation in the District or electronically in the same manner as the District publishes electronic notices of ITB or RFP; and

(B) No fewer than seven days before the deadline for submission of comments regarding the notice of intent to establish a Contract or Price Agreement through a Permissive Cooperative Procurement.

(c) Vendors shall submit comments within seven days after the notice of intent is published.

(d) If the District receives comments on its intent to establish a Contract, the District shall, prior to establishing a Contract or Price Agreement:

(A) Make a written determination that establishing a Contract is in the best interest of the District.

(B) Provide a copy of the written determination to all vendors that submitted comments.

PPS 46-0470 Protest and Disputes; Cooperative Procurements

(1) An Offeror or potential Offeror wishing to protest the procurement process, the contents of a Solicitation Document related to a Cooperative Procurement, or the award or proposed award of an Original Contract shall make the protest in accordance with ORS 279B.400 through 279B.425, unless the Administering Contracting Agency is not subject to the Code. If the Administering Contracting Agency is not subject to the Code, then the Offeror or potential Offeror shall make the protest in accordance with the processes and procedures established by the Administering Contracting Agency.

(2) Any other protests related to a Cooperative Procurement, or disputes related to a Contract arising out of a Cooperative Procurement, shall be made and resolved as set forth in ORS 279A.225.

(3) The failure of the District or other Purchasing Contracting Agency to exercise any rights or remedies it has under a Contract entered into through a Cooperative Procurement shall not affect the rights or remedies of the District or any other Contracting Agency that participates in the Cooperative Procurement, including the Administering Contracting Agency, and shall not prevent any other Purchasing Contracting Agency from exercising any rights or seeking any remedies that may be available to it under its own Contract arising out of the Cooperative Procurement.

PPS 46-0480 Contract Amendments; Cooperative Procurements

The District may amend a Contract entered into pursuant to a Cooperative Procurement as set forth in PPS 47-0800 or PPS 49-0910, as applicable.

PERSONAL SERVICES CONTRACTS

PPS 46-0500 Personal Services Contract Definition

(1) Pursuant to ORS 279A.055(2), a Contract for Personal services ("PSC") is a Contract primarily for the provision of Services that require specialized technical, creative, professional, or communication skills or talents, unique and specialized knowledge, or the exercise of discretionary judgment skills, and for which the quality of services depends on attributes that are unique to the service provider.

(2) PSCs that fall within the definition in section (1) of this rule include, but are not limited to, the following:

- **(a)** Contracts for services performed in a professional capacity, including services of an accountant, attorney, medical professional (e.g., doctor, dentist, nurse, counselor), information technology consultant, or broadcaster, except for Architectural, Engineering, Photogrammetric Mapping or Land Surveying services and other construction-related professional services subject to division 48 of these rules;
- **(b)** Contracts for services as an artist in the performing or fine arts, including any Person identified as a photographer, filmmaker, actor, director, painter, weaver, or sculptor;
- **(c)** Contracts for services that are specialized, creative, or research-oriented;
- **(d)** Contracts for educational services;
- **(e)** Contracts for human custodial care, child care, mental health care, health services, social and emergency services, and other human services; and
- **(f)** Contracts for other professional or technical consulting services not listed above.

(3) The Contract Review Board delegates to the Superintendent the discretion to decide whether a particular type of Contract or service falls within the definition of "Personal Services Contract" as set forth in Sections (1) and (2) of this rule.

(4) The District shall not use PSCs to obtain and pay for the services of an employee. A PSC may be used only to obtain and pay for the services of an independent Contractor.

PPS 46-0505 Personal Service Contract Formal Selection Procedures

The District shall use a formal selection procedure if the estimate contract amount of personal services contract is greater than $250,000. All formal RFP and RFQ solicitations shall comply with the requirements for competitive sealed Proposals contained in ORS 279B.060 and may be solicited, processed, and reviewed through any of the Sealed proposal procurement methods set forth in PPS 47-0260 to 47-0263.

PPS 46-0510 PSC Informal Selection Procedures

The District may use an informal selection process to obtain Personal services when a formal selection process is not required.

(1) The informal selection process shall solicit responses/Proposals from at least three qualified Contractors offering the required services. If three Proposals are not reasonably available, fewer will suffice, but the District shall make a written record of the effort made to obtain at least three Proposals.

(2) The informal selection process is intended to be competitive. The selection and ranking may be based on criteria including, but not limited to, each Proposer's:

(a) Particular capability to perform the services required;

(b) Experienced staff available to perform the services required, including each Proposer's recent, current, and projected workloads;

(c) Performance history;

(d) Approach and philosophy used in providing services;

(e) Fees or costs;

(f) Geographic proximity to the project or the area where the services are to be performed; and

(g) Work volume previously awarded by the District, with the object of effecting an equitable distribution of Contracts among qualified Contractors. But distribution shall not violate the policy of selecting the most highly qualified Contractor to perform the services at a fair and reasonable price.

Written confirmation of solicitation attempts and responses with Contractor names and addresses shall be maintained in the District's Solicitation file.

PPS 46-0515 Other Approved Solicitation Methods

(1) Request for Qualifications. An RFQ may be used to determine that competition does not exist for a particular service, to establish a list of qualified Contractors for RFPs or for informal solicitations under these rules, or to establish an FSCP as provided in PPS 46-0520.

(a) The RFQ shall at least describe the particular specialty desired, the qualifications the Contractor shall have in order to be considered, and the evaluation factors and their relative importance. The RFQ may require information including, but not limited to, the Contractor's particular capability to perform the required services; the number of experienced staff available to perform the required services, including specific qualifications and experience of personnel; a list of similar services the Contractor has completed with references concerning past performance; and any other information necessary to evaluate Contractor qualifications.

(b) A qualifications pre-submission meeting (voluntary or mandatory) may be held for all interested Contractors to discuss the proposed services. The RFQ shall include the date, time, and place of the meeting.

(c) Unless the RFQ establishes that competition does not exist or that Contracts will be individually negotiated with Contractors in an FSCP, each Contractor qualified under an RFQ will receive a notice (or other materials as appropriate) of any required services and have an opportunity to submit a proposal or Price quote in response to the District's subsequent RFP.

(2) Price Agreements. The District may enter into Price Agreements for Personal services. Such Price Agreements shall be solicited as otherwise required by these rules based on the maximum Contract amount.

(3) Cooperative Procurement. The District may contract for Personal services pursuant to a Cooperative Procurement in compliance with PPS 46-0400 to 46-0480.

PPS 46-0520 Flexible Services Contractor Pool

The Superintendent may establish an FSCP for a particular class of services where the need for such services is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly that it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

(1) Solicitation to Create an FSCP. An FSCP can be established pursuant to an RFQ, an RFP, competitive quotes, or such other method of competitive procurement as the Superintendent deems to be appropriate given the services to be procured.

(a) The Superintendent shall document in the Solicitation file the reasons for establishing an FSCP consistent with this rule. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(b) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside the designated class of Contracts to the FSCP.

(c) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(d) The solicitation may request a binding Price quote or rate that will become part of a subsequent Contract or may establish the pool based on qualification alone.

(e) The solicitation may set or limit the value of the work performed by the FSCP.

(2) Contracting for Work From an FSCP.

(a) Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform individual projects within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual projects will be offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the superintendent has offered Work to all the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer), a new random FSCP list will be generated. The Superintendent may Offer Work out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for Work that is a continuation of, addition to, or connected with Work previously performed by a Contractor on the list and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability is required. In order to make this determination, the Superintendent shall conduct an informal procurement pursuant to PPS 46-0510 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(b) An FSCP established under this section will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(c) Appointment to an FSCP does not guarantee that a Contractor will receive a particular amount of work or any Work at all.

(d) The establishment of an FSCP does not preclude the Superintendent from procuring Work that would otherwise fall within the FSCP class of work from other Contractors through any other procurement method authorized under these rules.

(e) At any time during the term of an FSCP, the Superintendent may request confirmation from a Contractor or Contractors in the pool that the Contractor continues to maintain the skills, personnel, or other capability needed to perform the class of work.

PPS 46-0525 PSC Selection by Negotiation

The Superintendent may procure Personal services with Contractors through direct negotiation in any of the following circumstances:

(1) The Contract Price is not more than $75,000.

(2) The Superintendent has established an FSCP pursuant to PPS 46-0520(2) for a particular class of projects, and the Contractor is on the FSCP list.

(3) The nature of the work is not project-driven but requires an ongoing, long-term relationship of knowledge and trust. Examples of such Work include insurance brokerage/agent of record services, medical services, and audit services.

(4) The Contractor possesses unique knowledge and/or expertise in a specialized service area, making competition impractical. Such services can include, but are not limited to, education services, academic and staff coaching, school sports officiation, and community relations.

(5) The Contract is for the purpose of supporting the Benson Polytechnic High School Building Construction Class, and all or a portion of the Contract Price is discounted or donated to the District.

(6) A Contract for which a non-District funding source, e.g., a Grant or a federal, state, or city contract, identifies the Contractor in the funding award or makes a funding award conditioned upon the service being performed by a specific Contractor. The following shall be documented to the Solicitation file:

(a) The name of the external funding source;

(b) The background on how the funding source selected the Contractor(s); and

(c) A copy of the funder's document naming the Contractor.

(7) A Contract where the student, parent, or other third-party participant selects the service provider and the process for selecting qualified Contractors has been approved in advance by the Director of procurement.

(8) The Contract is entered into pursuant to an emergency declared by the Superintendent.

(9) The Contract is for the provision of child care services to District students where the Contractor is paid directly by a non-District funding source (generally parents).

(10) The Contract is for the provision of tutoring to eligible District students attending private schools as per Title I.

(11) The Contract is for interim staff or temporary staffing services.

(12) The Contract is for the provision of therapeutic placement with outside agencies or programs to meet needs identified in a student's Individualized Education Program ("IEP").

(13) The Contract is for legal services. For the purposes of this section, "legal services" means attorney and paralegal services for transactional work, litigation, investigations, advice, reports, and other services requiring legal advice or work by an attorney, and includes all related costs or fees.

(14) The Contract is for services provided by those in the medical community including, but not limited to, doctors, physicians, psychologists, nurses, laboratory technicians and those with specific license or unique skill to administer treatments for the health and well-being of people."

PPS 46-0530 PSC Contract Requirements

District PSCs shall contain the mandatory Contract provisions set forth in ORS 279B.020(5), 279B.220, 279B.230, 279B.235(3), and, if the Contract involves lawn or landscape maintenance, ORS 279B.225.

PPS 46-0535 PSC Contract Amendments

(1) The District may amend any Personal services Contract if the District, in its sole discretion, determines that the amendment is within the scope of the Solicitation and that the amendment would not materially impact the field of competition for the Personal services described in the final form of the original procurement document. In making this determination, the District shall consider potential alternative methods of procuring the services contemplated under the proposed amendment. An amendment would not materially impact the field of competition for the services described in the Solicitation Document if the District reasonably believes that the number of Proposers would not significantly increase if the procurement document were re-issued to include the additional services.

(2) The District may amend any Contract if the additional services are required by reason of existing or new laws, rules, regulations, or ordinances of federal, state, or local agencies which affect performance of the Original Contract.

(3) All amendments to Contracts shall be in writing, shall be signed by an authorized representative of the Consultant and the District, and shall receive all required approvals before the amendments will be binding on the District.

(4) Amendments That Would Cause a Contract to Exceed the Superintendent's Authority. An amendment to a contract approved by the Superintendent that would cause the total Contract Price to exceed the Superintendent's delegated authority to approve contracts under PPS 45-0200 shall be approved by the School Board except as provided in PPS 45-0200(7)(b).

PROCUREMENT OF CONTRACTS FUNDED IN WHOLE OR IN PART BY FEDERAL AWARD

PPS 46-0600 General Rule: Federal Law Prevails in Case of Conflict

When a District contract involves federal funds that require compliance with federal statutes or regulations, the federal statutes and regulations govern over any conflicting provisions in these rules or the State of Oregon Public Contracting Code. See ORS 279A.030. Notwithstanding the foregoing, when both state and federal prevailing rates of wage apply to a particular, the District shall require payment not less than the higher of the applicable state or federal prevailing rate of wage. See ORS 279C.830.

PPS 46-0605 Procurements Subject to the Uniform Guidance

Procurement of contracts supported in whole or in part by Federal award are generally subject to the procurement standards set forth in the Uniform Guidance at 2 CFR 200.317 to 200.326. PPS 46-600 to 625 are intended to comply with Uniform Guidance and supersede other District procurements with regard to procurement of contracts supported in whole or in part by Federal award.

PPS 46-0610 General Procurement Standards for Contracts Subject to the Uniform Guidance

If the District contract is supported in whole or in part by a Federal award, the following provisions apply to the Contract:

(1) The District shall apply the procedures in these rules to avoid acquisition of unnecessary or duplicative items. The District shall consolidate or break out procurements when necessary to make a more economical

purchase. Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other appropriate analysis to determine the most economical approach.

(2) To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the Federal government, the District is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services.

(3) The District is encouraged to use Federal excess and surplus property in lieu of purchasing new equipment and property whenever such use is feasible and reduces project costs.

(4) The District shall include value engineering clauses in contracts for construction projects of sufficient size to offer reasonable opportunities for cost reductions. Value engineering is a systematic and creative analysis of each contract item or task to ensure that its essential function is provided at the overall lower cost.

(5) The District shall award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources.

(6) The District shall maintain records sufficient to detail the history of the particular procurement. These records will include, but are not necessarily limited to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price.

(7) Time and Material Contracts

(a) The District may use a time and materials type contract only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. For the purposes of this section "time and materials type contract" means a contract whose cost to the District is the sum of:

(A) The actual cost of materials; and

(B) Direct labor hours charged at fixed hourly rates that reflect wages, general and administrative expenses, and profit.

(b) All time and materials contract shall include a ceiling price that the contractor exceeds at its own risk.

(c) The District shall conduct sufficient oversight of a time a time and materials type contract to obtain reasonable assurance that the contractor is using efficient methods and cost controls.

PPS 46-0615 Required Competition

All procurement transactions for contracts supported in whole or in part by federal award shall be conducted in a manner providing full and open competition consistent with the standards of this section.
(1) Contractors that develop or draft specifications, requirements, statements of work, and invitations to Bid or requests for proposals shall be prohibited from competing for such procurement.

(2) The District shall not unreasonable restrict competition by:

(a) Imposing unreasonable prequalification requirements;

(b) Requirement unnecessary experience and excessive bonding;

(c) Allowing or requiring non-competitive pricing practices between firms or affiliated companies;

(d) Awarding non-competitive contracts to consultants that are on retaining contracts;

(e) Allowing organizational conflicts of interest;

(f) Specifying only a brand name product instead of allowing an equal product to be offered and describing the performance or other relevant requirements of the procurement; or

(g) Taking any arbitrary action in the procurement process.

(3) The District may not apply any statutory or administratively imposed state or local geographical preferences except where allowed or mandated by applicable federal statutes. Nothing in this section preempts state licensing requirements. In addition, contracts for architectural and engineering services may include geographical location as a selection criterion provided its applications leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.

(4) A District procurement shall:

(a) Incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured, but should not be so detailed or restrict that it unduly restricts competition; and

(b) Identify all requirements that bidders or proposers shall fulfill and all other factors to be used in evaluating bids or proposals.

(5) The District shall ensure that all prequalified lists of persons, firms, or products that are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. Also, the District shall allow potential bidders to qualify during the Solicitation period.

PPS 46-0620 Procurement by Micro-Purchases

procurement by micro-purchase is the acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold. The current micro-purchase threshold is set at $10,000, but is periodically adjusted. The most current threshold is set forth at 48 CFR Subpart 2.101 (Definitions). To the extent practicable, the District shall distribute micro-purchases equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations if the District considers the price to be reasonable.

PPS 46-0625 Procurement by Small Purchase Procedures

Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold. The Simplified Acquisition threshold is set at $250,000, but is periodically adjusted. The most current threshold is set forth at 48 CFR Subpart 2.1. If small purchase procedures are used, the District shall obtain price or rate quotation from an adequate number of qualified sources.

PPS 46-0630 Procurement by Sealed Bids (Formal Advertising)

Bids are publicly solicited and a firm fixed price contract (lump sum or unit price) supported by a Federal award shall be awarded to the responsible bidder whose Bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed Bid method is the preferred method for procuring construction, if the conditions in paragraph (1) of this section apply.

(1) In order for sealed bidding to be feasible, the following conditions should be present:

(a) A complete, adequate, and realistic specification or purchase description is available;

(b) Two or more responsible bidders are willing and able to compete effectively for the business; and

(c) The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.

(2) If sealed bids are used, the following requirements apply:

(a) Bids shall be solicited from an adequate number of known suppliers, providing them sufficient response time prior to the date set for opening the bids, for local, and tribal governments, the invitation for bids shall be publicly advertised;

(b) The invitation for bids, which will include any specifications and pertinent attachments, shall define the items or services in order for the bidder to properly respond;

(c) All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids shall be opened publicly;

(d) A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs shall be considered in determining which Bid is lowest. Payment discounts will only be used to determine the low Bid when prior experience indicates that such discounts are usually taken advantage of; and

(e) Any or all bids may be rejected if there is a sound documented reason.

PPS 46-0635 Procurement by Competitive Proposals

The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids. If this method is used for contracts supported by a Federal award, the following requirements apply:

(1) Requests for proposals shall be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals shall be considered to the maximum extent practical;

(2) Proposals shall be solicited from an adequate number of qualified sources;

(3) The District shall establish a written method for conducting technical evaluations of the proposals received and for selecting recipients;

(4) Contracts shall be awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered; and

(5) The District may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby competitors' qualifications are evaluated and the most qualified competitor is selected, subject to negotiation of fair and reasonable compensation. Notwithstanding ORS 279C.100 to 279C.124 and OAR division 48, qualifications-based selection can only be used in procurement of A/E professional services.

PPS 46-0640 Procurement by Noncompetitive Proposals

procurement by noncompetitive proposals is procurement through solicitation of a proposal from only one source and may be used only for contracts supported by a Federal award when one or more of the following circumstances apply:

(1) The item is available only from a single source;

(2) The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;

(3) The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the District; or

(4) After solicitation of a number of sources, competition is determined inadequate.

PPS 46-0645 Contracting With Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms

(1) The District shall take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(2) Affirmative steps shall include:

(a) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(b) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(c) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(d) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(e) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

(f) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (a) through (f) of this section.

PPS 46-0650 Procurement of Recovered Materials

The District and its contractors shall comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

PPS 46-0655 Contract Cost and Price

(1) The District shall perform a cost or price analysis in connection with every procurement action supported by a Federal award in excess of the Simplified Acquisition Threshold including contract modifications. The District shall make independent estimates before receiving bids or proposals.

(2) The District shall negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. To establish a fair and reasonable profit, consideration shall be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.

(3) Costs or prices based on estimated costs for contracts under the Federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated prices would be allowable for the non-Federal entity under 2 CFR Subpart E—Cost Principles. The District may reference its own cost principles that comply with the Federal cost principles.

(4) The cost plus a percentage of cost and percentage of construction cost methods of contracting shall not be used.

PPS 46-0660 Federal Awarding Agency or Pass-Through Entity Review

At the request the Federal awarding agency or the pass-through entity, the District shall make available all relevant procurement documents for review as required by 2 CFR section 200.324.

PPS 46-0665 Bonding Requirements

For construction or facility improvement contracts or subcontracts supported by a Federal award exceeding the Simplified Acquisition Threshold, the Federal awarding agency or pass-through entity may accept the bonding policy and requirements of the District provided that the Federal awarding agency or pass-through entity has made a determination that the Federal interest is adequately protected. If such a determination has not been made, the minimum requirements shall be as follows:

(1) A bid guarantee from each bidder equivalent to five percent of the Bid price. The "bid guarantee" shall consist of a firm commitment such as a bid bond, certified check, or other negotiable instrument accompanying a bid as assurance that the bidder will, upon acceptance of the bid, execute such contractual documents as may be required within the time specified.

(2) A performance bond on the part of the contractor for 100 percent of the contract price. A "performance bond" is one executed in connection with a contract to secure fulfillment of all the contractor's obligations under such contract.

(3) A payment bond on the part of the contractor for 100 percent of the contract price. A "payment bond" is one executed in connection with a contract to assure payment as required by law of all persons supplying labor and material in the execution of the work provided for in the contract.

PPS 46-0670 Mandatory Contract Provisions

In addition to other provisions required by the Federal agency or non-Federal entity, all contracts made by the District under a Federal award shall contain provisions covering the following, as applicable.

(1) Contracts for more than the Simplified Acquisition Threshold (see Subsection 5) shall address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

(2) All contracts in excess of $10,000 shall address termination for cause and for convenience by the non-Federal entity including the manner by which it will be effected and the basis for settlement.

(3) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 shall include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR Part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

(4) Davis-Bacon Act, as Amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-Federal entities shall include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors shall be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors shall be

required to pay wages not less than once a week. The non-Federal entity shall place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract shall be conditioned upon the acceptance of the wage determination. The non-Federal entity shall report all suspected or reported violations to the Federal awarding agency. The contracts shall also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient shall be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity shall report all suspected or reported violations to the Federal awarding agency.

(5) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of $100,000 that involve the employment of mechanics or laborers shall include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor shall be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic shall be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

(6) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient shall comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

(7) Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as Amended. Contracts and subgrants of amounts in excess of $150,000 shall contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations shall be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

(8) Debarment and Suspension (Executive Orders 12549 and 12689). A contract award (see 2 CFR 180.220) shall not be made to parties listed on the government-wide exclusions in the System for award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR Part 1986 Comp., p. 189) and 12689 (3 CFR Part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties Debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

(9) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). Contractors that apply or bid for an award exceeding $100,000 shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress,

or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

(10) Additional Requirements of the Specific Federal Award. In addition to the requirements of this section, a specific Federal award may contain other procurement requirements or mandatory contract clauses. The District officer, employee, or agent that is responsible for procurement of a contract subject to a Federal award shall review the requirements of the specific Federal award and shall incorporate such requirements into the procurement process or proposed contract.

END OF DIVISION 46

PPS DIVISION 47

PUBLIC CONTRACTING RULES FOR CONTRACTS FOR GOODS AND/OR SERVICES OTHER THAN PERSONAL SERVICES

PPS 47-0000 Generally

These division 47 rules implement ORS 279B applicable to public procurements for goods or services, or both.

PPS 47-0250 Methods of Source Selection

(1) Except as permitted in these rules, the District shall award a Public Contract for goods or services, or both, by one of the following sourcing methods:

- **(a)** Competitive sealed bidding (also known as Invitation to Bid or ITB) pursuant to ORS 279B.055 and PPS 47-0255 and 47-0257;
- **(b)** Competitive sealed Proposals (also known as Request for proposal or RFP) pursuant to ORS 279B.060 and PPS 47-0260 through 47-0263;
- **(c)** Small procurements ($25,000 or less) pursuant to ORS 279B.065 and PPS 47-0265;
- **(d)** Intermediate procurements (more than $25,000 to $250,000) pursuant to ORS 279B.070 and PPS 47-0270;
- **(e)** Sole-source procurement pursuant to ORS 279B.075 and PPS 47-0275;
- **(f)** Emergency Procurement pursuant to ORS 279B.080 and PPS 47-0280;
- **(g)** Special procurement pursuant to ORS 279B.085 and PPS 47-0285, including the Class Special Procurements set forth in PPS 47-0288; or
- **(h)** Cooperative Procurement pursuant to ORS 279A.200 and PPS 46-0400 through 46-0480.

PPS 47-0252 Procurement of Service Contracts Over $250,000 in Compliance With ORS 279B.030 Through 279B.036

(1) Unless the District determines that it is not feasible to perform the services with the District's own personnel and resources pursuant to section (4) of this rule, before conducting a procurement of a Contract for services with an estimated Contract Price that exceeds $250,000 the District shall conduct a written cost analysis in accordance with section (2) of this rule. The cost analysis shall compare an estimate of the District's cost in performing the services with an estimate of the cost that a potential Contractor would incur in performing the services. The District may proceed with the procurement only if it determines that the District would incur more cost in performing the services with its own personnel and resources than in procuring the services from a Contractor. For the purposes of this section, "Contract for services" does not include:

- **(a)** Contracts for Personal services as defined in PPS 46-0500.
- **(b)** Contracts for services exempted from compliance with the Public Contracting Code by ORS 197.025 or other state statute.
- **(c)** Procurements for Client services as defined in OAR 125-246-0110. "Client services" means any services that directly or primarily support a Client, whether or not the Client is the recipient through the provision of voluntary or mandatory services. Client services also means any goods that are incidental or specialized in relation to any services defined in this section. Client services may include, but are not limited to (where these terms are used in another statute, they shall have that meaning):

(A) Housing, including utilities, rent, or mortgage, or assistance to pay utilities, rent, or mortgage;

(B) Sustenance, including clothing;

(C) Employment training or skills training to improve employability;

(D) Services for people with disabilities;

(E) Foster care or foster care facilities;

(F) Residential care or residential care facilities;

(G) Community housing;

(H) In-home care, including home-delivered meals;

(I) Medical care, services, and treatment, including, but not limited to:

(i) Medical, dental, hospital, psychological, psychiatric, therapy, vision;

(ii) Alcohol and drug treatment;

(iii) Smoking cessation;

(iv) Drugs, prescriptions, and non-prescriptions; or

(v) Nursing services and facilities.

(J) Transportation or relocation;

(K) Quality of life, living skills training;

(L) Personal care;

(M) Legal services and expert witness services;

(N) Religious practices, traditions, and services, separately or in any combination thereof; and

(O) Educational services. The term "Client services" does not include benefits or services provided as a condition of employment with an agency.

(2) In the cost analysis required under section (1) of this rule, the District shall consider cost factors that include the following:

(a) Cost of Using the District's Own Personnel and Resources. When estimating the District's costs of performing the services, the District shall consider cost factors that include:

(A) Salary or wage and benefit costs for District employees who would be directly involved in performing the services to the extent those costs reflect the proportion of the activity of those employees in the direct provision of services. The costs include those salary or wage and benefit costs of the employees who inspect, supervise, or monitor the performance of the services to the extent those costs reflect the proportion of the activity of those employees in the direct inspection, supervision, or monitoring of the performance of the subject services.

(B) The material costs necessary to the performance of the services, including the costs for space, energy, transportation, storage, equipment, and supplies used or consumed in the provision of the services.

(C) The costs incurred in planning for, training for, starting up, implementing, transporting, and delivering the services.

(D) Any costs related to stopping and dismantling a project or operation because the District intends to procure a limited quantity of services or to procure the services within a defined or limited period of time.

(E) The miscellaneous costs related to performing the services. These costs exclude the District's indirect overhead costs for existing salaries or wages and benefits for administrators, and costs for rent, equipment, utilities, and materials except to the extent that the costs are attributable solely to performing the services and would not exist unless the District performs the services.

(F) ORS 279B.003 (1)(a) provides that an estimate of the District's costs of performing the services includes the costs described in Sections (A) through (E) of this rule. Therefore, those costs do not constitute an exclusive list of cost information. The District may consider other reliable information that bears on the cost to the District of performing the services. For example, if the District has accounted for its actual costs for performing the services under consideration, or reasonably comparable services in a relatively recent services project, the District may consider those actual costs in making its estimate.

(b) Costs of a Potential Contractor. When estimating a Contractor's costs of performing the services, the District shall consider cost factors that include:

(A) The average or actual salary or wage and benefit costs for Contractors and employees:

(i) Who work in the industry or business most closely involved in performing the services; and

(ii) Who would be necessary and directly involved in performing the services or who would inspect, supervise, or monitor the performance of the services;

(B) The material costs necessary to the performance of the services, including costs for space, energy, transportation, storage, raw and finished materials, equipment, and supplies used or consumed in the provision of the services; and

(C) The miscellaneous costs related to performing the services, including, but not limited to, reasonably foreseeable fluctuations in the costs for the items in Sections (A) through (C) of this rule.

(D) ORS 279B.033 (1)(a) provides that an estimate of the District's costs of performing the services includes the costs described in Sections (A) through (E) of this rule. Therefore, those costs do not constitute an exclusive list of cost information. The District may consider other reliable information that bears on the cost to the District of performing the services. For example, if the District, in the reasonably near past, received Bids or Proposals for the performance of services under consideration, or reasonably comparable services, the District may consider the pricing offered in those Bids or Proposals in making its estimate. Similarly, the District may consider what it actually paid out under a Contract for the same or similar services. For the purposes of these examples, the reasonably near past is limited to Contracts, Bids or Proposals entered into or received within the five years preceding the date of the cost estimate. The District shall take into account, when considering the pricing offered in previous Bids, Proposals or Contracts, adjustments to the pricing in light of measures of market price adjustments like the consumer price indexes that apply to the services.

(3) Decision Based on Cost Comparison. After comparing the difference between the costs estimated for the District to perform the services and the estimated costs a potential Contractor would incur in performing the services under section (5)(c), the District may proceed with the procurement only if the District would

incur more cost in performing the services with the District's own personnel and resources than it would incur in procuring the services from a Contractor.

(4) Exceptions.

(a) Exception Based on Salaries or Wages and Benefits. If the sole reason that the costs estimated for the District to perform the services exceed the estimated a potential Contractor would incur in performing the services is because the average or actual salary or wage and benefit costs for Contractors and their employees estimated under section (2)(b)(A) of this rule are lower than the salary or wage and benefit costs for employees of the District estimated in section (2)(a)(A) of this rule, the District may not proceed with the procurement.

(b) Exception Based on Lack of District Personnel and Resources; Reporting. In cases in which the District determines that it would incur less cost in providing the services with the District's own personnel and resources, the District may nevertheless proceed with the procurement if, at the time the District intends to conduct a procurement, the District determines that it lacks personnel and resources to perform the services within the time the District requires them. When the District conducts a procurement under this section, the District shall:

(A) Make and keep a written determination that it lacks personnel and resources to perform the services within the time the District requires them and the basis for the District's decision to proceed with the procurement.

(B) Provide to the Contract Review Board, each calendar quarter, copies of each written cost analysis and written determination.

(5) Provision of Services by District Not Feasible. The District may proceed with a procurement of a Contract for services without conducting a cost analysis required under Sections (1) and (2) of this rule if the District makes written findings that use of the District's own personnel or resources to perform the services is not feasible. Reasons include, but are not limited to, the following.

(a) The District lacks the specialized capabilities, experience, or technical or other expertise necessary to perform the services. In making the finding, the District shall compare the District's capability, experience, or expertise in the field most closely involved in performing the services with a potential Contractor's capability, experience, or expertise in the same or a similar field.

(b) Special circumstances require the District to procure the services by Contract. Special circumstances may include, but are not limited to, the following:

(A) The terms under which the District receives a Grant or other funds for use in a procurement require the District to obtain services through an independent contractor;

(B) Other state or federal law requires the District to procure services through an independent contractor;

(C) The procurement is for services that are incidental to a Contract for purchasing or leasing real or personal property, including service and maintenance agreements for equipment that is leased or rented;

(D) The District cannot accomplish policy, administrative, or legal goals, including, but not limited to, avoiding conflicts of interest or ensuring independent or unbiased findings in cases when using the District's existing personnel or Persons that the District could hire through a regular or ordinary process would not be suitable;

(E) The procurement is for Emergency services pursuant to PPS 47-0280;

(F) The procurement is for services, the need for which is so urgent, temporary, or occasional that attempting to perform the services with the District's own personnel or resources would cause a delay that would frustrate the purpose for obtaining the services;

(G) The services that the District intends to procure will be completed within six months after the date on which the Contract for the services is executed; or

(H) Any other circumstances, conditions, or occurrences that would make the services, if performed by the District's own employees and resources, incapable of being managed, utilized, or dealt with successfully in terms of the quantity, timeliness of completion, success in obtaining desired results, or other reasonable needs of the District.

PPS 47-0255 Competitive Sealed Bidding; One-Step Solicitations Competitive Sealed Bidding

(1) Generally. The District may procure goods or services by competitive sealed bidding as set forth in ORS 279B.055. An Invitation to Bid is used to initiate a competitive sealed bidding solicitation and shall contain the information required by ORS 279B.055(2) and by section (2) of this rule. The District shall provide public notice of the competitive sealed bidding solicitation as set forth in PPS 47-0300.

(2) Invitation to Bid. In accordance with ORS 279B.055(2), an Invitation to Bid shall include the following:

(a) General Information.

(A) Notice of any pre-Offer conference as follows:

(i) The time, date, and location of any pre-Offer conference;

(ii) Whether attendance at the conference will be mandatory or voluntary; and

(iii) A provision that provides that statements made by the District's representatives at the conference are not binding on the District unless confirmed by written Addendum.

(B) A procurement description;

(C) The form and instructions for submission of Bids, including the time, date, and place that Bids are due, and any other special information, e.g., whether Bids may be submitted by electronic means (see PPS 47-0330 for required provisions of electronic Bids);

(D) The time, date, and place of Opening;

(E) Key contact information as follows:

(i) The office or location where the Solicitation Documents may be reviewed;

(ii) The name of the person designated for receipt of Bids;

(iii) The name and title of the person designated by the District as the contact person for the procurement, if different from the person designated to receive Bids.

(F) A statement that each bidder shall identify whether the bidder is a "resident bidder," as defined in ORS 279A.120(1);

(G) Bidder's certification of nondiscrimination in obtaining required subcontractors in accordance with ORS 279A.110(4). (See PPS-46-0210(2)); and

(H) How the District shall notify bidders of Addenda, and how the District shall make Addenda available (see PPS 47-0430);

(I) A time, date, and place that prequalification applications, if any, shall be filed, and the classes of work, if any, for which bidders shall be prequalified in accordance with ORS 279B.120;

(J) The following statements:

(i) "The District may cancel the procurement or reject any or all Bids in accordance with ORS 279B.100."

(ii) A statement that requires the Contractor or subcontractor to possess an asbestos abatement license if required under ORS 468A.710.

(b) District Need to Purchase. The character of the goods or services that the District is purchasing including, if applicable, a description of the acquisition, specifications, delivery or performance schedule, inspection, and acceptance requirements. As required by ORS 279B.055(2)(c), the District's description of its need to purchase shall:

(A) Identify the scope of the work to be performed under the resulting Contract, if the District awards one;

(B) Outline the anticipated duties of the Contractor under any resulting Contract;

(C) Establish the expectations for the Contractor's performance of any resulting Contract; and

(D) Unless the District for Good Cause specifies otherwise, the scope of work shall require the Contractor to meet the highest standards prevalent in the industry or business most closely involved in providing the goods or services that the District is purchasing.

(c) Bidding and Evaluation Process.

(A) The anticipated solicitation schedule, deadlines, protest process, and evaluation process;

(B) The District shall set forth objective evaluation criteria in the Solicitation Document in accordance with the requirements of ORS 279B.055(6)(a). Evaluation criteria need not be precise predictors of actual future costs, but to the extent possible, the evaluation factors shall be reasonable estimates of actual future costs based on information that the District has available concerning future use; and

(C) If the District intends to award Contracts to more than one bidder pursuant to PPS 47-0600(4)(c), the District shall identify in the Solicitation Document the manner in which it will determine the number of Contracts it will award.

(d) Applicable Preferences Pursuant to ORS 279B.055(6)(b).

(A) Preference for Oregon goods or services pursuant to ORS 279A.120 and PPS 46-0300 and PPS 46-0310; and

(B) Preference for Recycled Materials pursuant to ORS 279A.125 and PPS 46-0320.

(e) Terms and Conditions. All contractual terms and conditions in the form of Contract provisions that the District determines are applicable to the procurement. As required by ORS 279B.055(2)(h), the Contract terms and conditions shall specify the consequences of the Contractor's failure to perform the scope of work or to meet the performance standards established by the resulting Contract. Those consequences may include, but are not limited to:

(A) The District's reduction or withholding of payment under the Contract;

(B) The District's right to require the Contractor to perform, at the Contractor's expense, any additional Work necessary to perform the statement of work or to meet the performance standards established by the resulting Contract; and

(C) The District's rights, which the District may assert individually or in combination, to declare a default of the resulting Contract, to terminate the resulting Contract, and to seek damages and other relief available under the resulting Contract or applicable law.

(f) Whether Bid Security Is Required.

(g) Good Cause. For the purposes of this rule, "Good Cause" means a reasonable explanation for not requiring Contractor to meet the highest standards, and may include an explanation of circumstances that support a finding that the requirement would unreasonably limit competition or is not in the best interest of the District. The District shall document in the Solicitation file the basis for the determination of Good Cause for specification otherwise. The District shall have Good Cause to specify otherwise under the following circumstances:

(A) The use or purpose to which the goods or services will be put does not justify a requirement that the Contractor meet the highest prevalent standards in performing the Contract;

(B) Imposing express technical, standard, dimensional, or mathematical specifications will better ensure that the goods or services will be compatible with or will operate efficiently or effectively with components, equipment, parts, services, or information technology including hardware, services, or software with which the goods or services will be used, integrated, or coordinated;

(C) The circumstances of the industry or business that provides the goods or services are sufficiently volatile in terms of innovation or evolution of products, performance techniques, or scientific developments that a reliable highest prevalent standard does not exist or has not been developed;

(D) Any other circumstances in which the District's interest in achieving economy, efficiency, compatibility, or availability in the procurement of the goods or services reasonably outweighs the District's practical need for the highest prevalent standard in the applicable or closest industry or business that supplies the goods or services to be delivered under the resulting Contract.

PPS 47-0257 Competitive Multistep Sealed Bidding; Multistep Solicitations

(1) Generally. The District may procure goods or services by using multistep sealed bidding under ORS 279B.055(12).

(2) Phased Process. multistep sealed bidding is a phased procurement process that seeks information or unpriced submittals in the first phase combined with regular competitive Sealed Bidding, inviting bidders who submitted technically eligible submittals in the first phase to submit competitive sealed price Bids in the second phase. The Contract shall be awarded to the lowest Responsible bidder.

(3) Public Notice. When The District uses multistep sealed bidding, the District shall give public notice for the first phase in accordance with PPS 47-0300. Public notice is not required for the second phase. However, the District shall give notice of the second phase to all bidders, inform bidders of the right to protest Addenda issued after the initial Closing under PPS 47-0430, and inform bidders excluded from the second phase of the right, if any, to protest their exclusion under PPS 47-0720.

(4) Procedures Generally. In addition to the procedures set forth in PPS 47-0300 through 47-0490, the District shall employ the procedures set forth in this rule for multistep sealed bidding and in the Invitation to Bid.

(5) Procedure for Phase One of Multistep Sealed Bidding.

(a) Form. The District shall initiate multistep sealed bidding by issuing an Invitation to Bid in the form and manner required for competitive sealed Bids except as provided in this rule. In addition to the requirements set forth in PPS 47-0255(2), the multistep Invitation to Bid shall state:

(A) That the Solicitation is a multistep sealed Bid procurement and describe the process that the District shall use to conduct the procurement;

(B) That the District requests unpriced submittals and that the District shall consider price Bids only in the second phase and only from those bidders whose unpriced submittals are found eligible in the first phase;

(C) Whether bidders shall submit price Bids at the same time as unpriced submittals and, if so, that bidders shall submit the price Bids in a separate sealed envelope; and

(D) The criteria to be used in the evaluation of unpriced submittals.

(b) Evaluation. The District shall evaluate unpriced submittals in accordance with the criteria set forth in the Invitation to Bid.

(6) Procedure for Phase Two of Multistep Sealed Bidding.

(a) After the completion of phase one, if the District does not cancel the Solicitation, the District shall invite each eligible bidder to submit a price Bid.

(b) The District shall conduct phase two as any other competitive sealed Bid procurement except:

(A) As specifically set forth in this rule or the Invitation to Bid;

(B) No public notice need be given of the invitation to submit price Bids because such notice was previously given.

PPS 47-0260 Competitive Sealed Proposals

(1) Generally. The District may procure goods or services by competitive sealed Proposals as set forth in ORS 279B.060. The District shall use a Request for proposal to initiate a competitive sealed proposal. The Request for proposal shall contain the information required by ORS 279B.060(2) and by section (2) of this rule. The District shall provide public notice of the Request for proposal as set forth in PPS 47-0300.

(2) Request for Proposal. In accordance with the provisions required by ORS 279B.060(2), the Request for proposal shall include the following:

(a) General Information.

(A) Notice of any pre-Offer conference as follows:

(i) The time, date, and location of any pre-Offer conference;

(ii) Whether attendance at the conference will be mandatory or voluntary; and

(iii) A provision that provides that statements made by the District's representatives at the conference are not binding on the District unless confirmed by written Addendum.

(B) A procurement description.

(C) A time, date, and place that prequalification applications, if any, shall be filed, and the classes of work, if any, for which bidders shall be prequalified in accordance with ORS 279B.120.

(D) The form and instructions for submission of Proposals, and any other special information, e.g., whether Proposals may be submitted by electronic means (see PPS 47-0330 for required provisions of electronic Proposals);

(E) The time, date, and place of Opening;

(F) The office where the Solicitation Document may be reviewed;

(G) Key contact information, as follows;

(i) The name of the Person designated for receipt of Proposals.

(ii) The name and title of the person designated by the District as the contact Person for the procurement, if different from the Person designated to receive Proposals.

(H) Proposers' certification of nondiscrimination in obtaining required subcontractors in accordance with ORS 279A.110(4) (See PPS 46-210(2); and

(I) How the District shall notify Proposers of Addenda and how the District shall make Addenda available. (See PPS 47-0430.)

(J) The following statements:

(i) "The District may cancel the procurement or reject any or all Proposals in accordance with ORS 279B.100."

(ii) A statement that requires the Contractor or subcontractor to possess an asbestos abatement license if required under ORS 468A.710.

(b) District Need to Purchase. The character of the goods or services the District is purchasing including, if applicable, a description of the acquisition, specifications, delivery or performance schedule, inspection, and acceptance requirements. As required by ORS 279B.060(2)(c), the District's description of its need to purchase shall:

(A) Identify the scope of the work to be performed under the resulting Contract, if the District awards one; and

(B) Outline the anticipated duties of the Contractor under any resulting Contract; and

(C) Establish the expectations for the Contractor's performance of any resulting Contract; and

(D) Unless the Contractor under any resulting Contract will provide architectural, engineering, photogrammetric mapping, transportation planning or land surveying services or related services that are subject to ORS 279C.100 through 279C.125 or PPS 46-0500 through 46-0525, or the District for Good Cause specifies otherwise, the scope of work shall require the Contractor to meet the highest standards prevalent in the industry or business most closely involved in providing the goods or services that the District is purchasing.

(c) Proposal and Evaluation Process.

(A) The anticipated solicitation schedule, deadlines, protest process, and evaluation process.

(B) The District shall set forth selection criteria in the Solicitation Document in accordance with the requirements of ORS 279B.060(3)(e), including the relative importance of price and any other evaluation factors used to rate the Proposals in the first tier of competition, and if more than one tier of competitive evaluation may be used, a description of the process under which the Proposals will be evaluated in the subsequent tiers. Evaluation criteria need not be precise predictors of actual future costs and performance, but to the extent possible the criteria shall:

(i) Afford the District the ability to compare the Proposals and Proposers, applying the same standards of comparison to all Proposers;

(ii) Rationally reflect Proposers' abilities to perform the resulting Contract in compliance with the Contract's requirements; and

(iii) Permit the District to determine the relative pricing offered by the Proposers, and to reasonably estimate the costs to the District of entering into a Contract based on each proposal, considering information available to the District and subject to the understanding that the actual Contract costs may vary as a result of the Statement of work ultimately negotiated or the quantity of goods or services for which the District contracts.

(C) If the District's solicitation process calls for the District to establish a competitive Range, the District shall generally describe, in the Solicitation Document, the criteria or parameters that the District shall apply to determine the competitive Range. The District, however, subsequently may determine or adjust the number of Proposers in the competitive Range in accordance with PPS 47-0261(6).

(d) Applicable Preferences, including those described in ORS 279A.120, 279A.125(2), and 282.210.

(A) Preference for Oregon goods or services, pursuant to ORS 279A.120 and PPS 46-0300 and PPS 46-0310;

(B) Preference for Recycled Materials, pursuant to ORS 279A.125 and PPS 46-0320; and

(C) Performance within the state of public printing, binding, and stationery Work, pursuant to ORS 282.210.

(e) Contractual Terms and Conditions. All contractual terms and conditions the District determines are applicable to the procurement. The District's determination of contractual terms and conditions that are applicable to the procurement may take into consideration, as authorized by ORS 279B.060(3), those contractual terms and conditions the District will not include in the Request for proposal because the District either will reserve them for negotiation or will request Proposers to offer or suggest those terms or conditions. (See PPS 47-0260(3).)

(f) Consequences of Failure to Perform. As required by ORS 279B.060(2)(h), the Contract terms and conditions shall specify the consequences of the Contractor's failure to perform the scope of work or to meet the performance standards established by the resulting Contract. Those consequences may include, but are not limited to:

(A) The District's reduction or withholding of payment under the Contract;

(B) The District's right to require the Contractor to perform, at the Contractor's expense, any additional work necessary to perform the scope of work or to meet the performance standards established by the resulting Contract; and

(C) The District's rights, which the District may assert individually or in combination, to declare a default of the resulting Contract, to terminate the resulting Contract, and to seek damages and other relief available under the resulting Contract or applicable law.

(g) Whether proposal security is required.

(3) The District may include the applicable contractual terms and conditions in the form of Contract provisions or legal concepts to be included in the resulting Contract. Further, the District may specify that it will include or use Proposer's terms and conditions that have been pre-negotiated under PPS 47-550(8), but the District may only include or use a Proposer's pre-negotiated terms and conditions in the resulting Contract to the extent that those terms and conditions do not materially conflict with the applicable Contract

terms and conditions. The District shall not agree to any Proposer's terms and conditions that were expressly rejected in a solicitation protest under PPS 47-0730.

(4) For multiple award Contracts, the District may enter into Contracts with different terms and conditions with each Contractor to the extent those terms and conditions do not materially conflict with the applicable contractual terms and conditions. The District shall not agree to any Proposer's terms and conditions that were expressly rejected in a solicitation protest under PPS 47-0730.

(5) Good Cause. For the purposes of this rule, "Good Cause" means a reasonable explanation for not requiring the Contractor to meet the highest standards prevalent in the industry or business most closely involved in providing the goods or services under the Contract, and may include an explanation of circumstances that support a finding that the requirement would unreasonably limit competition or is not in the best interest of the District. The District shall document in the Solicitation file the basis for the determination of Good Cause or for specifying otherwise. The District shall have Good Cause to specify otherwise when the District determines that:

(a) The use or purpose to which the goods or services will be put does not justify a requirement that the Contractor meet the highest prevalent standards in performing the Contract;

(b) Imposing express technical, standard, dimensional, or mathematical specifications will better ensure that the goods or services will be compatible with, or will operate efficiently or effectively with, associated information technology, hardware, software, components, equipment, parts, or on-going services with which the goods or services will be used, integrated, or coordinated;

(c) The circumstances of the industry or business that provides the goods or services are sufficiently volatile in terms of innovation or evolution of products, performance techniques, or scientific developments, that a reliable highest prevalent standard does not exist or has not been developed;

(d) That other circumstances exist in which the District's interest in achieving economy, efficiency, compatibility, or availability in the procurement of the goods or services reasonably outweighs the District's practical need for the highest standard prevalent in the applicable or closest industry or business that supplies the goods or services to be delivered under the resulting Contract.

(6) Optional Proposal Requirements.

(a) As provided in the Request for proposal or in written Addenda issued thereunder, the District may conduct site tours, demonstrations, individual or group discussions, and other informational activities with Proposers before or after the opening of Proposals for the purpose of clarification to ensure full understanding of, and responsiveness to, the Solicitation requirements or to consider and respond to requests for modifications of the proposal requirements. The District shall use procedures designed to accord Proposers fair and equal treatment with respect to any opportunity for discussion and revision of Proposals.

(b) For purposes of evaluation, when provided for in the Request for proposal, the District may employ methods of Contractor selection that include, but are not limited to:

(A) An award or awards based solely on the ranking of Proposals;

(B) Discussions leading to best and final Offers, in which the District may not disclose private discussions leading to best and final Offers;

(C) Discussions leading to best and final Offers, in which the District may not disclose information derived from Proposals submitted by competing Proposers;

(D) Serial negotiations, beginning with the highest ranked Proposer;

(E) Competitive simultaneous negotiations;

(F) multi-tiered competition designed to identify, at each level, a class of Proposers that fall within a competitive Range or to otherwise eliminate from consideration a class of lower-ranked Proposers;

(G) A multistep Request for proposal requesting the submission of unpriced technical submittals, and then later issuing a Request for proposal limited to the Proposers whose technical submittals the District had determined to be qualified under the criteria set forth in the initial Request for proposal; or

(H) Any combination of methods described in this paragraph as authorized or prescribed by these rules.

(c) Revisions of Proposals may be permitted after the submission of Proposals and before award for the purpose of obtaining best Offers or best and final Offers.

(d) After the opening of Proposals, the District may issue or electronically post an Addendum to the Request for proposal that modifies the criteria, rating process, and procedure for any tier of competition before the start of the tier to which the Addendum applies. The District shall send an Addendum that is issued by a method other than electronic posting to all Proposers who are eligible to compete under the Addendum. The District shall issue or post the Addendum at least five days before the start of the subject tier of competition or as otherwise determined by the District to be adequate to allow eligible Proposers to prepare for the competition in accordance with rules adopted under ORS 279A.065.

(7) The cancellation of Requests for Proposals and the rejection of Proposals shall be in accordance with ORS 279B.100.

(8) In the Request for proposal, the District shall describe the methods by which the District shall make the results of each tier of competitive evaluation available to the Proposers who competed in the tier. The District shall include a description of the manner in which the Proposers who are eliminated from further competition may protest or otherwise object to the District's decision.

(9) The District shall issue or electronically post the notice of intent to award described in ORS 279B.135 to each Proposer who was evaluated in the final competitive tier.

(10) If a Contract is awarded, the District shall award the Contract to the responsible Proposer whose proposal the District determines in writing to be the most advantageous to the District based on the evaluation process and evaluation factors described in the Request for proposal, any applicable preferences described in ORS 279A.120 and 279A.125, and, when applicable, the outcome of any negotiations authorized by the Request for proposal. Other factors may not be used in the evaluation. When the Request for proposal specifies or authorizes the award of multiple Public Contracts, the District shall award Public Contracts to the responsible Proposers who qualify for the award of a Contract under the terms of the Request for proposal.

(11) The District may issue a request for information, a request for interest, a Request for Qualifications, or other preliminary documents to obtain information useful in the preparation of a Request for proposal.

PPS 47-0261 Procedures for Competitive Range; Multi-Tiered and Multistep Solicitations Multistep Proposals

(1) Generally. The District may use one or more, or any combination of procure goods or services employing any combination of the methods of Contractor selection set forth in ORS 279B.060(7), 279B.0608 and this rule to procure goods or services. In addition to the procedures set forth in PPS 47-0300 through 47-0490 for methods of Contractor selection, the District may provide for a multi-tiered or multistep selection process that permits award to the highest ranked Proposer at any tier or step, calls for the

establishment of a competitive Range, or permits either serial or competitive simultaneous discussions or negotiations with one or more Proposers.

(2) Methods. When conducting a multi-tiered or multistep selection process, the District may use any combination or series of Proposals, discussions, negotiations, demonstrations, offers, or other means of soliciting information from Proposers that bears on the selection of a Contractor or Contractors. In multi-tiered and multistep competitions, the District may use these means of soliciting information from prospective Proposers and Proposers in any sequence or order, and at any stage of the selection process, as determined in the discretion of the District.

(3) District May Elect to Award Contract Prior to Completion of Stages. When the District's Request for proposal prescribes a multi-tiered or multistep Contractor selection process, the District nevertheless may, at the completion of any stage in the competition and on determining the Most Advantageous Proposer (or, in multiple award situations, on determining the awardees of the Public Contracts), award a Contract (or Contracts) and conclude the procurement without proceeding to subsequent stages. The District also may, at any time, cancel the procurement under ORS 279B.100.

(4) Exclusion Protest. The District may provide, before the notice of an intent to award, an opportunity for a Proposer to protest exclusion from the competitive Range or from subsequent phases of multi-tiered or multistep sealed Proposals as set forth in PPS 47-0720.

(5) Award Protest. The District shall provide an opportunity to protest its intent to award a Contract pursuant to ORS 279B.410 and PPS 47-0740. An Affected Offeror may protest, for any of the bases set forth in PPS 47-0720(2), its exclusion from the competitive Range or from any phase of a multi-tiered or multistep sealed proposal process, or may protest an Addendum issued following initial Closing, if the District did not previously provide Proposers the opportunity to protest the exclusion or Addendum. The failure to protest shall be considered the Proposer's failure to pursue an administrative remedy made available to the Proposer by the District.

(6) Competitive Range. When the District's solicitation process conducted under ORS 279B.060(8) calls for the District to establish a competitive Range at any stage in the procurement process, the District may do so as follows:

(a) Determining Competitive Range.

(A) The District may establish a competitive Range after evaluating all Responsive Proposals in accordance with the evaluation criteria in the Request for proposal. After evaluation of all Proposals in accordance with the criteria in the Request for proposal, the District may determine and rank the Proposers in the competitive Range. Notwithstanding the foregoing, however, in instances in which the District determines that a single Proposer has a reasonable chance of being determined the most Advantageous Proposer, the District need not determine or rank Proposers in the competitive Range. In addition, notwithstanding the foregoing, the District may establish a competitive Range of all Proposers to enter into discussions to correct deficiencies in Proposals.

(B) The District may establish the number of Proposers in the competitive Range in light of whether the District's evaluation of Proposals identifies a number of Proposers who have a reasonable chance of being determined the most advantageous Proposer, or whether the evaluation establishes a natural break in the scores of Proposers that indicates that a particular number of Proposers are closely competitive or have a reasonable chance of being determined the most Advantageous Proposer.

(b) Protesting Competitive Range. The District shall provide written notice to all Proposers identifying Proposers in the competitive Range. The District may provide an opportunity for

Proposers excluded from the competitive Range to protest the District's evaluation and determination of the competitive Range in accordance with PPS 47-0720.

(7) Discussions. The District may initiate oral or written discussions with all "eligible Proposers" on subject matter within the general scope of the Request for proposal. In conducting discussions, the District:

(a) Shall treat all eligible Proposers fairly and shall not favor any eligible Proposer over another;

(b) May disclose other eligible Proposers' Proposals or discussions only in accordance with ORS 279B.060(8)(b) or (c);

(c) May adjust the evaluation of a proposal as a result of discussions. The conditions, terms, or price of the proposal may be changed during the course of the discussions provided the changes are within the scope of the Request for proposal.

(d) At any time during the time allowed for discussions, the District may:

(A) Continue discussions with a particular eligible Proposer;

(B) Terminate discussions with a particular eligible Proposer and continue discussions with other eligible Proposers; or

(C) Conclude discussions with all remaining eligible Proposers and provide, to the then-eligible Proposers, notice requesting best and final Offers.

(8) Negotiations.

(a) Serial Negotiations Allowed. The District may commence serial negotiations with the highest ranked eligible Proposer or commence simultaneous negotiations with all eligible Proposers. The District may negotiate:

(A) The statement of work;

(B) The Contract Price as it is affected by negotiating the statement of work and other terms and conditions authorized for negotiation in the Request for proposal or Addenda thereto; and

(C) Any other terms and conditions reasonably related to those authorized for negotiation in the Request for proposal or Addenda thereto. Proposers shall not submit for negotiation, and a District shall not accept, alternative terms and conditions that are not reasonably related to those authorized for negotiation in the Request for proposal or any Addendum.

(b) Terminating Negotiations. At any time during discussions or negotiations the District conducts under this rule, the District may terminate discussions or negotiations with the highest ranked Proposer, or the eligible Proposer with whom it is currently discussing or negotiating, if the District reasonably believes that:

(A) The eligible Proposer is not discussing or negotiating in good faith; or

(B) Further discussions or negotiations with the eligible Proposer will not result in the parties agreeing to the terms and conditions of a Contract in a timely manner.

(c) Continuing Serial Negotiations. If the District is conducting serial negotiations and the District terminates negotiations with an eligible Proposer, the District may then commence negotiations with the next highest-scoring eligible Proposer, and continue the sequential process until the District has either:

(A) Determined to award the Contract to the eligible Proposer with whom it is currently discussing or negotiating; or

(B) Decided to cancel the procurement under ORS 279B.100.

(d) Competitive Simultaneous Negotiations. If the District chooses to conduct competitive negotiations, the District may negotiate simultaneously with competing eligible Proposers. The District:

(A) Shall treat all eligible Proposers fairly and shall not favor any eligible Proposer over another;

(B) May disclose other eligible Proposers' Proposals or the substance of negotiations with other eligible Proposers only if the District notifies all of the eligible Proposers with whom the District shall engage in negotiations of the District's intent to disclose before engaging in negotiations with any eligible Proposer.

(e) Any oral modification of a proposal resulting from negotiations shall be reduced to writing.

(9) Best and Final Offers. If the District requires best and final Offers, the District shall establish a common date and time by which eligible Proposers shall submit best and final Offers. If the District is dissatisfied with the best and final Offers, the District may make a written determination that it is in the District's best interest to conduct additional discussions, negotiations or change the District's requirements and require another submission of best and final Offers. The District shall inform all eligible Proposers that if they do not submit notice of withdrawal or another best and final Offer, their immediately previous Offers will be considered their best and final Offers. The District shall evaluate Offers as modified by the best and final Offers. The District shall conduct the evaluations as described in OAR PPS 47-0600. The District may not modify evaluation factors or their relative importance after the date and time that best and final Offers are due.

(10) Multistep Sealed Proposals. The District may procure goods or services by using multistep competitive sealed Proposals under ORS 279B.060(8)(b)(g). multistep sealed Proposals is a phased procurement process that seeks necessary information or unpriced technical Proposals in the first phase and, in the second phase, invites Proposers who submitted technically qualified Proposals to submit competitive sealed price Proposals on the technical Proposals. The District shall award the Contract to the Responsible Proposer submitting the most advantageous proposal in accordance with the terms of the Solicitation Document applicable to the second phase.

(a) Public Notice. When the District uses multistep sealed Proposals, the District shall give public notice for the first phase in accordance with PPS 47-0300. Public notice is not required for the second phase. However, the District shall give notice of the subsequent phases to all Proposers and inform any Proposers excluded from the second phase of the right, if any, to protest exclusion under PPS 47-0720.

(b) Procedure for Phase One of Multistep Sealed Proposals. The District may initiate a multistep sealed Proposals procurement by issuing a Request for proposal in the form and manner required for competitive sealed Proposals except as provided In this rule. In addition to the requirements required for competitive sealed Proposals, the multistep Request for proposal shall state:

(A) That unpriced technical Proposals are requested;

(B) That the Solicitation is a multistep sealed proposal procurement and that, in the second phase, priced Proposals will be accepted only from those Proposers whose unpriced technical Proposals are found qualified in the first phase;

(C) The criteria for the evaluation of unpriced technical Proposals; and

(D) That the goods or services being procured shall be furnished generally in accordance with the Proposer's technical proposal as found to be finally qualified and shall meet the requirements of the Request for proposal.

(c) Addenda to the Request for Proposal. After receipt of unpriced technical Proposals, Addenda to the Request for proposal shall be distributed only to Proposers who submitted unpriced technical Proposals.

(d) Receipt and Handling of Unpriced Technical Proposals. Unpriced technical Proposals need not be opened publicly.

(e) Evaluation of Unpriced Technical Proposals. Unpriced technical Proposals shall be evaluated solely in accordance with the criteria set forth in the Request for proposal.

(f) Discussion of Unpriced Technical Proposals. The District may seek clarification of a technical proposal of any Proposer who submits a qualified, or potentially qualified, technical proposal. During the course of such discussions, the District shall not disclose any information derived from one unpriced technical proposal to any other Proposer.

(g) Methods of Contractor Selection for Phase One. In conducting phase one, the District may employ any combination of the methods of Contractor selection that call for the establishment of a competitive Range or include discussions, negotiations, or best and final Offers as set forth in this rule.

(h) Procedure for Phase Two. On the completion of phase one, the District shall invite each qualified Proposer to submit price Proposals. The District shall conduct phase two as any other competitive sealed proposal procurement except as set forth in this rule.

(i) No public notice need be given of the request to submit Price Proposals because such notice was previously given.

PPS 47-0265 Small Procurements

(1) Generally. For procurements of goods or services less than or equal to the dollar amount stated in ORS 279B.065, the District may award a Contract as a Small procurement in any manner the District deems practical or convenient, including by direct selection or award.

(2) Amendments. The District may amend a Contract awarded as a Small procurement in accordance with PPS 47-0800.

(3) No Fragmentation. A procurement may not be artificially divided or fragmented so as to constitute a Small procurement. See ORS 279B.065(2).

PPS 47-0270 Intermediate Procurements

(1) Generally. For procurements of goods or services greater than the dollar amount stated in ORS 279B.065 and less than or equal to the higher dollar amount stated in ORS 279B.070, the District may award a Contract as an intermediate procurement pursuant to ORS 279B.070.

(2) Intermediate Solicitation Process. When conducting an intermediate procurement, the District shall seek at least three informally solicited competitive Price quotes or competitive Proposals from prospective Contractors. The District 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 District shall make a written record of the effort made to obtain the quotes or Proposals.

(3) Negotiations. The District may negotiate with a prospective Contractor who offers to provide goods or services in response to an intermediate procurement to clarify its quote or Offer or to effect modifications that will make the quote or Offer more Advantageous to the District.

(4) Award. If a Contract is awarded, the District shall award the Contract to the Offeror whose quote or proposal will best serve the interests of the District, taking into account price as well as considerations

including, but not limited to, experience, expertise, product functionality, suitability for a particular purpose, and Contractor responsibility under ORS 279B.110.

(5) Amendments. The District may amend a Contract awarded as an intermediate procurement in accordance with PPS 47-0800.

(6) No Fragmentation. A procurement may not be artificially divided or fragmented so as to constitute an intermediate procurement. See ORS 279B.070(2).

PPS 47-0275 Sole-Source Procurements

(1) Generally. The Superintendent is delegated the authority to determine whether goods and service or a class of goods or services are available from only one source pursuant to ORS 279B.075. The Superintendent's determination shall be based on written findings that may include information that:

(a) The efficient utilization of existing goods or services requires the acquisition of compatible goods or services;

(b) The goods or services required for the exchange of software or data with other public or private agencies are available from only one source;

(c) 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.

(2) Public Notice. If the Contract amount is greater than $150,000, the District shall give public notice of the Superintendent's determination that the goods or services or class of goods or services are available from only one source. The District shall publish such notice in a manner similar to public notice of competitive sealed Bids under ORS 279B.055(4) and PPS 47-0300. The public notice shall describe the goods or services to be acquired by a sole-source procurement, identify the prospective Contractor, and include the date, time, and place that protests are due. The District shall give Affected Persons at least seven (7) days from the date of the notice of the determination that the goods or services are available from only one source to protest the sole-source determination.

(3) Protest. An Affected Person may protest the Superintendent's determination that the goods or services or class of goods or services are available from only one source in accordance with PPS 47-0710.

PPS 47-0280 Emergency Procurements

(1) Generally. The Superintendent may award a Public Contract as an Emergency Procurement. The Superintendent will document the nature of the emergency and describe the method used for selection of the particular Contractor. See ORS 279B.080.

(2) Construction Services. For Emergency Procurement of construction, the District shall ensure competition for a Contract for the Emergency Work that is reasonable and appropriate under the emergency circumstances. In conducting the procurement, the District shall set a solicitation time period that the District determines to be reasonable under the Emergency circumstances, and may issue written or oral requests for Offers or make direct appointments without competition in cases of extreme necessity. See PPS 49-0150.

SPECIAL PROCUREMENTS (CONTRACTING EXEMPTIONS)

PPS 47-0285 Special Procurements; Purpose and Application

The District may award a Public Contract as a Special procurement pursuant to the requirements of ORS 279B.085 without using competitive sealed bidding or competitive sealed Proposals or other competitive procedures as otherwise required by these rules. The Contract Review Board shall approve

Special procurements. The Contract Review Board may approve the following two types of Special procurements:

(1) A "Class Special Procurement" is a procurement procedure for entering into a series of Contracts over time or for multiple projects based on the classification of the Contract.

(2) A "Contract-Specific Special Procurement" is a procurement procedure for the purpose of entering into a single Contract or a number of related Contracts on a one-time basis or for a single project.

PPS 47-0287 Special Procurements; Request Procedures

(1) To seek approval of an additional Special procurement, the Superintendent shall submit a written request to the Contract Review Board. The request shall describe the contracting procedure, the goods or services or class of goods or services that are the subject of the Special procurement, and the circumstances that justify the use of a Special procurement under the standards set forth in section (2) of this rule.

(2) The Contract Review Board shall review and may approve a request for a Special procurement if the Contract Review Board finds that the use of the Special procurement:

(a) Is unlikely to encourage favoritism in the awarding of Public Contracts or to substantially diminish competition for Public Contracts; and

(b) **(A)** Is reasonably expected to result in substantial cost savings to the District or to the public; or

(B) Otherwise substantially promotes the public interest in a manner that could not practicably be realized by complying with procurement requirements that would otherwise be applicable to the procurement under division 47 of these rules.

(3) The District shall give public notice of approval of a Special procurement in the manner provided in ORS 279B.055(4) and PPS 47-0300. The notice will describe the goods or services or class of goods or services subject to the Special procurement, and shall give Affected Persons at least seven days from the date of notice of the approval of the Special procurement to protest the Special procurement.

(4) An Affected person may protest the approval of a Special procurement in accordance with ORS 279B.400 and PPS 47-0700.

(5) An approved Class Special Procurement shall be added to enumerated Class Special Procurements in PPS 47-0288.

PPS 47-0288 Approved Class Special Procurements

The Contract Review Board declares the following classes of Contracts for goods or services listed in this section as Class Special Procurements for which Contracts may be awarded without compliance with the competitive procurement requirements that would otherwise be applicable to the procurement under division 47 of these rules. Unless an alternative procurement process is particularly specified in these rules, the selection procedures for such Class Special Procurements shall be as the Superintendent determines will result in a Contract that will best serve the interests of the District. Prior to utilizing a Class Special Procurement, the Superintendent will document in writing in the Solicitation file the reasons why the Contract qualifies as a Class Special Procurement under these rules, including any required findings. Except as otherwise provided in this rule, the School Board shall approve any Contracts awarded pursuant to Special procurement if the Contract Price exceeds the Superintendent's delegated authority under PPS 45-0200. The Contract Review Board hereby designates the following classes of Contracts for Special procurement:

(1) **Advertising Contracts**. The District may purchase advertising in any medium, regardless of the dollar value of the Contract. The District may sell advertising for District publications or activities, regardless of the dollar value of the Contract.

(2) Equipment Repair/Overhaul. The District may enter into a Public Contract for equipment repair or overhaul without competitive procurement, subject to the following conditions:

(a) Where the extent of the repair or overhaul is unknown or not easily identified; or

(b) Where service or parts requirements are unpredictable; or

(c) Service or parts required are for equipment for which specially trained personnel are required, and such personnel are available from only one source; and

(d) Conducting a competitive process is impractical. The District shall document in the Solicitation file the reasons why a competitive process was deemed to be impractical

(3) Specifications.

(a) "Or Equal" Specification.

(A) A Brand Name or Equal Specification may be used when the use of a Brand Name or Equal Specification is advantageous to the District, because the Brand Name describes the standard of quality, performance, functionality, and other characteristics of the product needed by the District.

(B) The Superintendent is entitled to determine what constitutes a product that is equal or superior to the product specified, and any such determination is final.

(C) Nothing in this section may be construed as prohibiting the Superintendent from specifying one or more comparable products as examples of the quality, performance, functionality, or other characteristics of the product needed by the District.

(b) Specifying a Particular Make or Product. A Brand Name Specification may be prepared and used only if the Superintendent determines for a solicitation or a class of solicitations that only the identified Brand Name Specification will meet the needs of the District based on one or more of the following findings:

(A) That use of a Brand Name Specification is unlikely to encourage favoritism in the awarding of Public Contracts or substantially diminish competition for Public Contracts;

(B) That use of a Brand Name Specification would result in substantial cost savings to the District;

(C) That there is only one manufacturer or seller of the product of the quality, performance, or functionality required;

(D) That the equipment or supplies being procured are used in athletic programs or physical education programs; or

(E) That efficient utilization of existing goods requires the acquisition of compatible goods or services. For the purposes of this finding, "compatibility" includes, without limitation, technical compatibility, technological equity, and equivalent ease of training, durability, and use. "Compatibility" also includes, without limitation, compatibility among equipment in a standardized technology bundle developed to deliver curriculum in a classroom.

(4) Copyrighted Materials and Creative Works. The District may directly purchase copyrighted materials or creative works regardless of dollar value if available from only one source. Examples of copyrighted materials covered by this exemption may include, but are not necessarily limited to, all adopted curriculum materials and tools in any format, including without limitation hard copy, electronic, digital or online. Examples of such curriculum material include textbooks, workbooks, curriculum kits, on-line curriculum, instructional software applications and related digital resources, assessments, assessment materials and reports. This exemption also includes reference materials in any format, including without

limitation books, periodicals, audio and visual media, and non-mass-marketed software. Examples of creative works covered by this Class Special Procurement including without limitation, artwork, music, uncopyrighted writings, and similar works.

(5) Insurance and Employee Benefits. The District may purchase liability, property damage, workers' compensation, and other insurance and insurance services Contracts, and employee benefits, without competitive procurement and regardless of dollar amount, by selecting either a vendor directly or by appointing an agent of record. For the purpose of this Special procurement, "employee benefits" includes, but is not limited to, "employee benefit plans" as defined in ORS 243.105(1), plans provided through the Oregon Educators Benefits Board pursuant to ORS 243.860 through 243.886, plans provided through the School District No. 1J Health and Welfare Trust, flexible benefit plans as defined in ORS 243.221, insurance or other benefit based on life, supplemental medical, supplemental dental, optical, accidental death or disability insurance plans, long-term care insurance, health care coverage to retired officers, employees, spouses, and children, employee assistance plans, and expense reimbursement plans.

(6) Spot Buys. This Special procurement provides a process for the District to procure products that are available for a limited period of time at "lower-than-normal" prices (also referred to as "spot buys").

(a) Regardless of dollar value and without competitive procurement, the District may purchase "spot buys."

(b) Conditions. The District may procure an unlimited dollar value of products when any of the following conditions are present:

(A) A non-exclusive mandatory-use Contract or regularly scheduled bid process already exists for the item being purchased;

(B) The proposed unit price of the item(s) to be purchased is significantly less than a comparable item's price on an existing mandatory-use Contract, recent bid, or based on obtaining at least three quotes, and the amount saved exceeds any additional administrative costs incurred to purchase the item using this Special procurement;

(C) The product being purchased has limited availability (i.e., the product may no longer be available or available at the special price upon completion of normal bid processes); or

(D) Any mandatory-use Contract currently in place for the item being purchased contain clauses allowing for the use of this Special procurement.

(c) Notwithstanding Subsection 6(b) of this section, the District may not purchase a spot buy if doing so would jeopardize fulfillment of a guaranteed minimum volume under an existing mandatory-use Contract;

(d) Documentation. Purchases may only be made under this Special procurement if the Superintendent documents to the Solicitation file that the conditions set forth in section (6)(b) apply to the proposed purchase.

(e) Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on "spot-buy" Contracts in any dollar amount, but will report the nature and amount of the Contract to the School Board as provided in PPS 45-0200(6).

(7) Price Agreements.

(a) Price Agreements may be established for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining District requirements for volume discounts, creating standardization among agencies, and reducing lead time for ordering. The Superintendent may enter into Price Agreements to purchase goods or

services for an anticipated need at a predetermined price, but the Contract shall be let by a competitive procurement process pursuant to the requirements of these rules.

(b) The Superintendent may purchase the goods or services from a Contractor awarded a Price Agreement without first undertaking additional competitive solicitation up to the amount set forth in the Price Agreement.

(c) The Superintendent may use the Price Agreement entered into by another Public Agency when the Original Contract was let pursuant to PPS 46-0400 through 46-0480;

(d) The term of the Price Agreement, including renewals, may not exceed the term stated in the original solicitation.

(8) Purchase of Used Personal Property. The District may purchase used property or equipment. "Used personal property or equipment" is property or equipment that has been placed in its intended use by a previous owner or user for a time recognized in the relevant trade or industry as qualifying the personal property or equipment as "used" at the time of the District purchase. "Used personal property or equipment" generally does not include property or equipment if the District was the previous user, whether under a lease, as part of a demonstration, trial, or pilot project, or under a similar arrangement. Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on a Contract for the purchase of used personal property in any dollar amount.

(9) Sale of Used Personal Property.

(a) The Superintendent may sell used personal property without obtaining competitive Bids or quotes if a liquidation sale would bring in greater revenue to the District than would be gained through Bids. As used in this section, "surplus personal property" is property or equipment that has been determined to no longer be useful to the District. It may be property or equipment that the District has used for some time and that is fully used up or obsolete. It may be property or equipment that is the natural excess or leftover from a project, such as cable, wire, carpet, etc., that has been cut or partially used in some manner so that it cannot be returned to the supplier for a refund.

(b) For sales of surplus property valued at more than $25,000 per item or lot, the Superintendent shall attempt to obtain at least three competitive quotes. The Superintendent will keep a written record of the source and number of quotes received. If three quotes are not available, a written record shall be made of the attempt to obtain three quotes.

(c) The Superintendent may sell used personal property regardless of price via an electronic auction or sales service including, without limitation, eBay, Craigslist, or other similar Internet-based auctions or marketplaces. If the service does not otherwise provide for a competitive sales process, the Superintendent will establish a minimum bid, a time period for acceptance of Bids, and will not sell the property unless the Superintendent receives a minimum of three Bids. The sale will be awarded to the highest Responsible bidder submitting a Responsive Bid, except that the Superintendent may accept a lower bid if transportation or other costs associated with collection or delivery of the property would offset the higher bid amount.

(d) The Superintendent may sell, sell at a discount, or donate used personal property to another school district, to another Public Body, or to a nonprofit corporation that provides educational, social, or other important services to the District, District students, or families of District students.

(e) If the Superintendent determines that the used personal property has no market value, or that the market value is so low that the staff time or cost involved in selling the property is likely to exceed the value of the used personal property, the Superintendent may dispose of the property as the Superintendent determines is in the best interest of the District.

(10) Reverse Auctions.

(a) A reverse auction means a process for the purchase of goods or services from the lowest bidder. The District shall conduct reverse auctions by first publishing a solicitation that describes its requirements and Contract terms and conditions. Then the District shall solicit online Bids from all interested bidders through an Internet-based program. The solicitation shall set forth a start and end time for Bids and specify the following type of information to be disclosed to bidders during the reverse auction:

(A) The prices of the other bidders or the price of the most competitive bidder;

(B) The rank of each bidder (e.g., (i) "winning" or "not winning" or (ii) "1st, 2nd, or higher");

(C) The scores of the bidders if the District chooses to use a scoring model that weighs non-price factors in addition to price; or

(D) Any combination of (A), (B), and (C) above. Before the reverse auction commences, bidders shall be required by the District to assent to the Contract terms and conditions, either in writing or by an Internet "click" agreement. The bidders then compete for the award of a Contract by offering successively lower prices, informed by the price(s), ranks, and scores, separately or in any combination thereof, disclosed by the District. The identity of the bidders shall not be revealed during this process. Only the successively lower price(s), ranks, scores, and related details, separately or in any combination thereof, will be revealed to the participants. The District may cancel this solicitation if the District determines that it is in the District's best interest. At the end of this Bidding process, the District shall award any potential Contract to the lowest Responsible bidder, or in the case of multiple awards, lowest Responsible bidders pursuant to ORS 279A.055(10)(b). This process allows the District to test and determine the suitability of the goods or services before making the award.

(11) Software and Hardware Maintenance, Licenses, Subscriptions, Other Digital Resources and Upgrades. The Superintendent may directly enter into a Contract or renew existing Contracts for information technology and telecommunications hardware or software maintenance, software licenses and subscriptions (including for programs, applications, and other digital or electronic resources), and upgrades without competitive solicitation where the maintenance, upgrades, subscriptions, and licenses are either available from only one source or, if available from more than one provider, are obtained from the District's current provider in order to utilize the pre-existing knowledge of the vendor regarding the specifics of the District's hardware or software system. The Superintendent shall document in the Solicitation file the facts that justify either that maintenance, licenses, subscriptions, and upgrades were available from only one source or, if from more than one source, from the current vendor.

(12) Hazardous Material Abatement.

(a) The Superintendent may enter into Public Contracts without competitive procurement, regardless of dollar amount, when ordered to clean up oil or hazardous waste pursuant to the authority granted by 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.

(b) The Superintendent shall, to the extent reasonable under the circumstances, encourage competition by attempting to obtain informal quotes from potential suppliers of goods or services.

(c) The department responsible for managing or coordinating the clean-up shall submit a written description of the circumstances that require the clean-up and a copy of the DEQ order for the clean-up to the District Purchasing Department.

(d) The District Purchasing and Contracting Department shall record the measures taken under section (12)(b) 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.

(e) The District may not contract pursuant to this exemption in the absence of an order from the DEQ to clean up a site that includes a time limit that would not allow the District to hire a Contractor under normal competitive procurement procedures. Goods or services to perform other hazardous material removal or clean-up will be purchased in accordance with normal competitive procurement procedures as described in these rules and policies.

(f) Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on a Contract for hazardous material abatement in any dollar amount.

(13) Purchase of Products for Resale to Students and Staff. The District may purchase personal property for resale to students and staff without competitive procurement and regardless of dollar amount.

(14) Radio and Television Contracts for Student Activities.

(a) Generally. The Superintendent shall use a competitive procurement method (e.g., an Invitation to Bid or Request for proposal) to obtain written Bids or Proposals to provide commercial radio and television services for any student activity or District program, including athletics, if the value of the services totals more than $150,000, regardless of whether the District is paying or receiving revenue under the Contract.

(b) Specific and Ancillary Services. The Solicitation Document used to invite Bids or Proposals to furnish radio or television services to District programs shall include the minimum bidder or qualifications and service specifications and will conform to the other requirements of the "Request for proposal" rule herein. The Solicitation Document may invite interested bidders or Proposers to offer other ancillary services. Each ancillary service, if offered, shall be accompanied by a dollar value that reflects the current purchase price for the service and a description of the service and its use and application.

(c) Term of Contract. A Contract for radio or television services may be awarded for up to five years.

(15) Donated Materials or Services. The District may directly negotiate a Contract with a Person to perform services or provide goods or services regardless of dollar amount, if:

(a) The Person has agreed to donate all or a significant portion of the materials or services necessary to perform the work; and

(b) The Person enters into a license or agreement with the District whereby the Person agrees to comply with the Public Contract requirements applicable to the particular project and any requirements that the District deems necessary or beneficial to protect the District.

(16) Manufacturer Direct Supplies. The District may purchase goods directly from a manufacturer if a large-volume purchase is required and the cost from the manufacturer is the same or less than the cost the manufacturer charges to its distributor(s). procurements of this type are made on a Contract-by-Contract basis and are not Price Agreements.

(17) Benson House Program Contracts. The District may directly negotiate a Contract for goods and/or services without complying with the competitive procurement requirements of these rules where the Contract is for the purpose of supporting the Benson Polytechnic High School Building Construction Class, and all or a portion of the Contract Price is discounted or donated to the District.

(18) Purchases Under Contracts Solicited by Nonprofit Procurement Organizations of Which the District Is a Member. The District may purchase goods and/or services under a Contract or procurement

solicited by a Nonprofit Procurement Organization of which it is a member. For the purposes of this Special procurement, such a procurement Organization will be considered to be an "Administering Contracting Agency" and a "Contracting Purchasing Group" under PPS 46-0400 through 46-0480. Such procurement shall otherwise comply with the requirements for permissive, joint, or Interstate Cooperative Procurements, as applicable, pursuant to PPS 46-0400 through 46-0480.

(19) Secure, Specialized Transportation for Special Needs Students. The Superintendent may contract directly for transportation services for special needs students where such transportation need requires a transportation service with skills or equipment tailored to the needs of the particular special needs student or class of special needs students. For the purposes of this Special procurement, a "special needs student" is a student with special physical, mental, developmental, or security needs such that District transportation, public transportation, or other private general transportation providers (taxicabs, town car services, charter services, etc.) cannot provide safe, beneficial, or timely service. Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on a Contract for secure, specialized transportation, in any dollar amount.

(20) FSCP. The Superintendent may establish an FSCP for goods, services, or construction services that are not Public Improvements for a particular class of services, where the need for such services is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly that it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

(a) Solicitation to Create an FSCP. An FSCP for goods or services shall be solicited based on the total cost of the work estimated to be awarded through the FSCP during its life. If the total amount of the work is estimated to be over $150,000, the Superintendent shall use a competitive sealed Proposals process as provided in PPS 47-0260. If the total amount of the work is $150,000 or less, the FSCP may be solicited pursuant to the intermediate procurement process set forth in PPS 47-0270.

(A) The Superintendent shall document the reasons for establishing an FSCP consistent with this rule in the Solicitation file. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(B) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside the designated class of Contracts to the FSCP.

(C) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(D) The solicitation may request a binding Price quote or rate that will become part of a subsequent Contract or may establish the pool based on qualification alone.

(E) The solicitation may set or limit the value of the work to be performed by the FSCP.

(b) Contracting for Work from an FSCP. Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform certain services or provide certain goods within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual services or goods will be offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the Superintendent has offered a Contract to all of the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer),

a new random FSCP list will be generated. The Superintendent may Offer a Contract to Contractors out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for goods or services that is a continuation of, addition to, or connected with goods or services previously performed by a Contractor on the list, and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work or provided the prior goods.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability or capacity is required. In order to make this determination, the Superintendent shall conduct an intermediate procurement pursuant to PPS 47-0270 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(c) An FSCP established under this rule will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(d) Appointment to an FSCP does not guarantee that a Contractor will receive a particular amount of work or orders, or any Work or orders at all.

(e) The establishment of an FSCP does not preclude the Superintendent from procuring goods or services that would otherwise fall within the FSCP from other Contractors through any other procurement method authorized under these rules.

(f) At any time during the term of an FSCP, the Superintendent may request confirmation from a Contractor or Contractors in the pool that the Contractor continues to maintain the skills, personnel, inventory, or other capability needed to perform the class of work or provide the required goods or services.

(g) If an FSCP for construction services is reasonably estimated to include Public Works projects that will total over $50,000 during the life of the FSCP, Public Works Contracts awarded to Contractors on an FSCP list shall require the payment of prevailing wages pursuant to ORS 279C.800 through 279C.870.

(21) Contracts for Price-Regulated Items. The Superintendent may contract for the direct purchase of goods or services where the rate or price for the goods or services being purchased is established by federal, state, or local regulatory authority without competitive solicitation.

(22) Service Monopoly. The Superintendent may enter into Contracts for Work by a utility or other entity that has been granted a monopoly for services for a specific geographic area or provision of a type of service and by agreement the utility or entity is either entitled to or is required to perform the required Work.

(23) Investment Contracts. The Superintendent may contract for the investment of District funds or the borrowing of funds by the District when such investment or borrowing is contracted pursuant to statute, rule, or constitution. The Superintendent shall use competitive methods where possible to achieve the best value for the District.

(24) Rating Agency Contracts. The District may purchase the services of Moody's Investors service, Standard & Poor's, or similar rating agencies.

(25) Gasoline, Diesel Fuel, Heating Oil, Lubricants, and Asphalt. The Superintendent may purchase gasoline, diesel fuel, heating oil, lubricants, and asphalt using the intermediate procurement Process set forth in PPS 47-0270 regardless of dollar amount.

(26) Hotel, Catering, and Space Rental Contracts.

(a) The Superintendent may rent a room or meeting facility in a hotel, event space, or other venue for District purposes without competitive procurement.

(b) The Superintendent may hire a caterer without competitive procurement where use of a particular caterer or catering service is a condition of rental of a facility.

(27) Specialized Assistive Equipment for Students. The superintendent may directly procure specialized assistive equipment for students, including without limitation positioning equipment for orthopedically impaired students and assistive technology for blind/vision impaired, deaf/hard of hearing, and deaf/blind students, and augmentative and alternative communication equipment for students who require such assistance.

(28) Service, Repair, or Maintenance Services for Products under Warranty. The superintendent may directly procure service, repair, or maintenance services from a manufacturer, dealer, or authorized service provider for a product or a system subject to a warranty when the terms of the warranty require use of a particular maintenance service provider or providers, or when the manufacturer or approved provider shall diagnose a problem because the system or part is proprietary.

PROCUREMENT PROCESS

PPS 47-0300 Public Notice of Solicitation Documents

(1) Notice of Solicitation Documents; Fee. The District shall provide public notice of every Solicitation Document in accordance with section (2) of this rule. The District may give additional notice using any method it determines appropriate to foster and promote competition, including:

(a) Mailing notice of the availability of the Solicitation Document to Persons that have expressed an interest in the District's procurements;

(b) Placing notice on the District's electronic procurement System; or

(c) Placing notice on the District's Internet World Wide Web site.

(2) Advertising. The District shall advertise every notice of a Solicitation Document as follows:

(a) The District shall publish the advertisement for Offers in accordance with the requirements of ORS 279B.055(4) and 279B.060(5) in at least one newspaper of general circulation in the District and in as many other publications as the District may determine; or

(b) The District may publish the advertisement for Offers on the District's electronic procurement System instead of publishing notice in a newspaper of general circulation required by ORS 279B.055(4) when the District determines that doing so is more cost effective.

(c) Notice shall be given at least seven days prior to the Solicitation Closing day.

(3) Content of Advertisement. All advertisements for Offers shall set forth:

(a) Where, when, how, and for how long the Solicitation Document may be obtained;

(b) A general description of the goods or services to be acquired;

(c) The interval between the first date of notice of the Solicitation Document given in accordance with Sections (2)(a) or (b) above and Closing, which shall not be less than fourteen (14) days for an Invitation to Bid and thirty (30) days for a Request for proposal, unless the District determines

that a shorter interval is in the public's interest, and that a shorter interval will not substantially affect competition. However, in no event shall the interval between the first date of notice of the Solicitation Document given in accordance with section (2)(a) or (b) above and Closing be less than seven (7) days as set forth in ORS 279B.055(4)(f). The District shall document the specific reasons for the shorter public notice period in the Solicitation file;

(d) The date that Persons shall file applications for prequalification if prequalification is a requirement, and that the class of goods or services is one for which Persons shall be prequalified;

(e) The office where Contract terms, conditions, and specifications may be reviewed;

(f) The name, title, and address of the individual authorized by the District to receive Offers;

(g) The scheduled Opening; and

(h) Any other information the District deems appropriate.

(4) Posting Advertisement for Offers. The District shall post a copy of each advertisement for Offers at the principal business office of the District. An Offeror may obtain a copy of the advertisement for Offers upon request.

(5) Fees. The District may charge a fee or require a deposit for the Solicitation Document.

(6) Notice of Addenda. The District shall provide potential Offerors notice of any Addenda to a Solicitation Document in accordance with PPS 47-0430.

PPS 47-0310 Bids or Proposals Are Offers

(1) Offer and Acceptance. The Bid or proposal is the bidder's or Proposer's Offer to enter into a Contract.

(a) In competitive bidding and competitive Proposals, the Offer is always a "Firm Offer," i.e., the Offer shall be held open by the Offeror for the District's acceptance for the period specified in PPS 47-0480. The District may elect to accept the Offer at any time during the specified period, and the District's award of the Contract constitutes acceptance of the Offer and binds the Offeror to the Contract.

(b) Notwithstanding the fact that a competitive proposal is a "Firm Offer" for the period specified in PPS 47-0480, the District may elect to discuss or negotiate certain contractual provisions, as identified in these rules or in the Solicitation Document, with the Proposer. Where negotiation is permitted by the rules or the Solicitation Document, Proposers are obligated to negotiate in good faith and only on those terms or conditions that the rules or the Solicitation Document have reserved for negotiation.

(2) Contingent Offers. Except to the extent that the Proposer is authorized to propose certain terms and conditions pursuant to PPS 47-0262, a Proposer shall not make its Offer contingent upon the District's acceptance of any terms or conditions (including specifications) other than those contained in the Solicitation Document.

(3) Offeror's Acknowledgment. By signing and returning the Offer, the Offeror acknowledges it has read and understands the terms and conditions contained in the Solicitation Document and that it accepts and agrees to be bound by the terms and conditions of the Solicitation Document. If the Request for proposal permits Proposers to propose alternative terms or conditions under PPS 47-0261, the Offeror's Offer includes any nonnegotiable terms and conditions, any proposed terms and conditions offered for negotiation upon and to the extent accepted by the District in writing, and Offeror's agreement to perform the scope of work and meet the performance standards set forth in the final negotiated scope of work.

PPS 47-0320 Facsimile Bids and Proposals

(1) District Authorization. The District may authorize Offerors to submit facsimile Offers. If the District determines that bid or proposal security is or will be required, the District should not authorize facsimile Offers unless the District has another method for receipt of such security. Prior to authorizing the submission of facsimile Offers, the District shall determine that the District's equipment and personnel are capable of receiving the size and volume of anticipated Offers within a short period of time. In addition, the District shall establish administrative procedures and controls:

(a) To receive, identify, record, and safeguard facsimile Offers;

(b) To ensure timely delivery of Offers to the location of Opening; and

(c) To preserve the Offers as sealed.

(2) Provisions to Be Included in Solicitation Document. In addition to all other requirements, if the District authorizes a facsimile Offer, the District shall include in the Solicitation Document the following:

(a) A provision substantially in the form of the following: "A 'facsimile Offer,' as used in this Solicitation Document, means an Offer, modification of an Offer, or withdrawal of an Offer that is transmitted to and received by the District via a facsimile machine";

(b) A provision substantially in the form of the following: "Offerors may submit facsimile Offers in response to this Solicitation Document. The entire response shall arrive at the place and by the time specified in this Solicitation Document";

(c) A provision that requires Offerors to sign their facsimile Offers;

(d) A provision substantially in the form of the following: "The District reserves the right to award the Contract solely on the basis of a facsimile Offer." However, upon the District's request the apparent successful Offeror shall promptly submit its complete original signed Offer;

(e) The data and compatibility characteristics of the District's receiving facsimile machine as follows:

(A) Telephone number; and

(B) Compatibility characteristics, e.g., make and model number, receiving speed, communications protocol; and

(f) A provision that the District is not responsible for any failure attributable to the transmission or receipt of the facsimile Offer including, but not limited to, the following:

(A) Receipt of garbled or incomplete documents;

(B) Availability or condition of the receiving facsimile machine;

(C) Incompatibility between the sending and receiving facsimile machine;

(D) Delay in transmission or receipt of documents;

(E) Failure of the Offeror to properly identify the Offer documents;

(F) Illegibility of Offer documents; and

(G) Security and confidentiality of data.

PPS 47-0330 Electronic Procurement

(1) Electronic Procurement Authorized.

(a) The District may conduct all phases of a procurement, including, without limitation, the posting of Electronic Advertisements and the receipt of electronic Offers, by electronic methods if and to

the extent the District specifies in a Solicitation Document, a Request for quotes, or any other written instructions on how to participate in the procurement.

(b) The District shall open an Electronic Offer in accordance with electronic security measures in effect at the District at the time of its receipt of the Electronic Offer. Unless the District provides procedures for the secure receipt of Electronic Offers, the Person submitting the Electronic Offer assumes the risk of premature disclosure due to submission in unsealed form.

(c) The District's use of electronic signatures shall be consistent with applicable statutes and rules. The District may limit the use of, electronic methods of conducting a procurement based on the best interests of the District, as determined by the District.

(d) If the District determines that bid or proposal security is or will be required, the District should not authorize Electronic Offers unless the District has another method for receipt of such security.

(2) Rules Governing Electronic Procurements. The District shall conduct all portions of an electronic procurement in accordance with these division 47 rules, unless otherwise set forth in this rule.

(3) Preliminary Matters. As a condition of participation in an electronic procurement, the District may require potential Contractors to register with the District before the date and time on which the District shall first accept Offers, to agree to the terms, conditions, or other requirements of a Solicitation Document, or to agree to terms and conditions governing the procurement, such as procedures that the District may use to attribute, authenticate, or verify the accuracy of an Electronic Offer, or the actions that constitute an electronic signature.

(4) Offer Process. The District may specify that Persons shall submit an Electronic Offer by a particular date and time, or that Persons may submit multiple Electronic Offers during a period of time established in the Electronic Advertisement. When the District specifies that Persons may submit multiple Electronic Offers during a specified period of time, the District shall designate a time and date on which Persons may begin to submit Electronic Offers, and a time and date after which Persons may no longer submit Electronic Offers. The date and time after which Persons may no longer submit Electronic Offers need not be specified by a particular date and time, but may be specified by a description of the conditions that, when they occur, will establish the date and time after which Persons may no longer submit Electronic Offers. When the District shall accept Electronic Offers for a period of time, then at the designated date and time that the District shall first receive Electronic Offers, the District shall begin to accept real time Electronic Offers on an electronic procurement System, and shall continue to accept Electronic Offers in accordance with section (5)(b) of this rule until the date and time specified by the District, after which the District shall no longer accept Electronic Offers.

(5) Receipt of Electronic Offers.

(a) When the District conducts an electronic procurement that provides that all Electronic Offers shall be submitted by a particular date and time, the District shall receive the Electronic Offers in accordance with these division 47 rules.

(b) When the District specifies that Persons may submit multiple Electronic Offers during a period of time, the District shall accept Electronic Offers, and Persons may submit Electronic Offers, in accordance with the following:

(A) Following receipt of the first Electronic Offer after the day and time that the District first receives Electronic Offers, the District shall post on the District's Electronic Procurement System, and updated on a real-time basis, the lowest Electronic Offer price or highest ranking Electronic Officer.

(B) A Person may not increase the price set forth in an Electronic Offer after the date and time that the District first accepts Electronic Offers.

(c) A Person may withdraw an Electronic Offer only in compliance with these division 47 rules. If a Person withdraws an Electronic Offer, it may not later submit an Electronic Offer at a price higher than that set forth in the withdrawn Electronic Offer.

(6) Failure of the E-Procurement System. In the event of a failure of the District's Electronic Procurement System that interferes with the ability of Persons to submit Electronic Offers, protest, or to otherwise participate in the procurement, the District may cancel the procurement in accordance with PPS 47-0660, or may extend the date and time for receipt of Electronic Offers by providing notice of the extension immediately after the Electronic Procurement System becomes available.

BID AND PROPOSAL PREPARATION

PPS 47-0400 Offer Preparation

(1) Instructions. An Offeror shall submit and sign its Offer in accordance with the instructions set forth in the Solicitation Document. An Offeror shall initial and submit any correction or erasure to its Offer prior to Opening in accordance with the requirements for submitting an Offer set forth in the Solicitation Document.

(2) Forms. An Offeror shall submit its Offer on the form(s) provided in the Solicitation Document, unless an Offeror is otherwise instructed in the Solicitation Document.

(3) Documents. An Offeror shall provide the District with all documents and Descriptive Literature required by the Solicitation Document.

PPS 47-0410 Offer Submission

(1) Product Samples and Descriptive Literature. The District may require Product Samples or Descriptive Literature if the District determines either is necessary or desirable to evaluate the quality, features, or characteristics of an Offer. The District shall dispose of Product Samples, or make them available for the Offeror to retrieve, in accordance with the Solicitation Document.

(2) Identification of Offers.

(a) To ensure proper identification and handling, Offers shall be submitted in a sealed envelope appropriately marked or in the envelope provided by the District, whichever is applicable. If the District permits Electronic Offers or facsimile Offers in the Solicitation Document, the Offeror may submit and identify Electronic Offers or facsimile Offers in accordance with these division 47 rules and the instructions set forth in the Solicitation Document. The District shall not consider facsimile or electronic Offers unless authorized by the Solicitation Document.

(b) The District is not responsible for Offers submitted in any manner, format, or to any delivery point other than as required in the Solicitation Document.

(3) Receipt of Offers. The Offeror is responsible for ensuring that the District receives its Offer at the required delivery point prior to the Closing, regardless of the method used to submit or transmit the Offer.

PPS 47-0420 Pre-Offer Conferences

(1) Purpose. The District may hold pre-Offer conferences with prospective Offerors prior to Closing to explain the procurement requirements, obtain information, or to conduct site inspections.

(2) Required Attendance. The District may require attendance at the pre-Offer conference as a condition for making an Offer.

(3) Scheduled Time. If the District holds a pre-Offer conference, it shall be held within a reasonable time after the Solicitation Document has been issued, but sufficiently before the Closing to allow Offerors to consider information provided at that conference.

(4) Statements Not Binding. Statements made by the District's representative at the pre-Offer conference do not change the Solicitation Document unless the District confirms such statements with a written Addendum to the Solicitation Document.

(5) District Announcement. The District shall set forth notice of any pre-Offer conference in the Solicitation Document in accordance with PPS 47-0255(2) or 47-0260(2).

PPS 47-0430 Addenda to Solicitation Document

(1) Issuance; Receipt. The District may change a Solicitation Document only by written Addenda. An Offeror shall provide written acknowledgment of receipt of all issued Addenda with its Offer, unless the District otherwise specifies in the Addenda.

(2) Notice and Distribution. The District shall notify prospective Offerors of Addenda in a manner intended to foster competition and to make prospective Offerors aware of the Addenda. The Solicitation Document shall specify how the District shall provide notice of Addenda and how the District shall make the Addenda available before Closing, and at each subsequent step or tier of evaluation if the District shall engage in a multistep competitive sealed bidding process in accordance with PPS 47-0257, or a multi-tiered or multistep competitive sealed proposals process in accordance with PPS 47-0261. The following is an example of how the District may specify how it will provide notice of Addenda: "The District will not mail notice of Addenda, but will publish notice of any Addenda on the District's web site. Offerors should frequently check the District's Web site until Closing, i.e., at least once weekly until the week of Closing and at least once daily the week of the Closing."

(3) Timelines; Extensions.

(a) The District shall issue Addenda within a reasonable time to allow prospective Offerors to consider the Addenda in preparing their Offers. The District may extend the Closing if the District determines that prospective Offerors need additional time to review and respond to Addenda. Except to the extent justified by a countervailing public interest, the District shall not issue Addenda less than 72 hours before the Closing unless the Addendum also extends the Closing.

(b) Notwithstanding subsection (3)(a) of this rule, an Addendum that modifies the evaluation criteria, selection process, or procedure for any step or tier of competition under a multistep sealed bidding or multistep sealed Proposals process issued in accordance with PPS 47-0257 or 47-0261 shall be issued no fewer than five days before the beginning of that tier or step of competition, unless the District determines that a shorter period is sufficient to allow Offerors to prepare for that tier or step of competition. The District shall document the factors it considered in making that determination, which may include, without limitation, the scope of the changes to the Solicitation Document, the location of the remaining eligible Proposers, or whether shortening the period between issuing an Addendum and the beginning of the next tier or step of competition favors or disfavors any particular Proposer or Proposers.

(4) Request for Change or Protest. Unless a different deadline is set forth in the Addendum, an Offeror may submit a written request for change or protest to the Addendum, as provided in PPS 47-0730, by the close of the District's next business day after issuance of the Addendum, or up to the last day allowed to submit a request for change or protest of the Solicitation under PPS 47-0730, whichever date is later. If the date established in the previous sentence falls after the deadline for receiving protests to the Solicitation Document in accordance with PPS 47-0730, then the District may consider an Offeror's request for change or protest to the Addendum only, and the District shall not consider a request for change or protest to matters not added or modified by the Addendum. Notwithstanding any provision of this section (4) of this rule, the District is not required to provide a protest period for Addenda issued after initial Closing during a multi-tiered or multistep procurement process conducted pursuant to ORS 279B.055 or 279B.060.

PPS 47-0440 Pre-Closing Modification or Withdrawal of Offers

(1) Modifications. An Offeror may modify its Offer in writing prior to the Closing. An Offeror shall prepare and submit any modification to its Offer to the District in accordance with PPS 47-0400 and PPS 47-0410, unless otherwise specified in the Solicitation Document. Any modification shall include the Offeror's statement that the modification amends and supersedes the prior Offer. The Offeror shall mark the submitted modification as follows:

(a) Bid (or proposal) Modification; and

(b) Solicitation Document Number (or other identification as specified in the Solicitation Document).

(2) Withdrawals.

(a) An Offeror may withdraw its Offer by written notice submitted on the Offeror's letterhead, signed by an authorized representative of the Offeror, delivered to the individual and location specified in the Solicitation Document (or the place of Closing if no location is specified), and received by the District prior to the Closing. The Offeror or authorized representative of the Offeror may also withdraw its Offer in person prior to the Closing upon presentation of appropriate identification and evidence of authority satisfactory to the District.

(b) The District may release an unopened Offer withdrawn under section (2)(a) of this rule to the Offeror or its authorized representative, after voiding any date and time stamp mark.

(c) The Offeror shall mark the written request to withdraw an Offer as follows:

(A) Bid (or proposal) Withdrawal; and

(B) Solicitation Document Number (or Other Identification as specified in the Solicitation Document).

(3) Documentation. The District shall include all documents relating to the modification or withdrawal of Offers in the appropriate Solicitation file.

PPS 47-0450 Receipt, Opening, and Recording of Offers; Confidentiality of Offers

(1) Receipt. The District shall electronically or mechanically time-stamp or hand-mark each Offer and any modification upon receipt. The District shall not open the Offer or modification upon receipt, but shall maintain it as confidential and secure until Opening. If the District inadvertently opens an Offer or a modification prior to the Opening, the District shall return the Offer or modification to its secure and confidential state until Opening. The District shall document the resealing for the Solicitation file (e.g., "District inadvertently opened the Offer due to improper identification of the Offer.").

(2) Opening and Recording. The District shall publicly open Offers including any modifications made to the Offer pursuant to PPS 47-0440(1). In the case of Invitations to Bid, to the extent practicable, the District shall read aloud the name of each bidder and such other information as the District considers appropriate. However, the District may withhold from disclosure information marked by the Offeror as "confidential" or a "trade secret" in accordance with ORS 279B.055(5)(c) and 279B.060(6). In the case of Requests for Proposals or voluminous Bids, if the Solicitation Document so provides, the District will not read Offers aloud.

PPS 47-0460 Late Offers, Late Withdrawals, and Late Modifications

Any Offer received after Closing is late. An Offeror's request for withdrawal or modification of an Offer received after Closing is late. The District shall not consider late Offers, withdrawals, or modifications except as permitted in PPS 47-0470 or 47-0261.

PPS 47-0470 Mistakes

(1) Generally. To protect the integrity of the competitive procurement process and to ensure fair treatment of Offerors, the District should carefully consider whether to permit waiver, correction, or withdrawal of Offers for certain mistakes.

(2) District Treatment of Mistakes. The District shall not allow an Offeror to correct or withdraw an Offer for an error in judgment. If the District discovers certain mistakes in an Offer after Opening but before the award of the Contract, the District may take the following action:

(a) The District may waive, or permit an Offeror to correct, a minor informality. A minor informality is a matter of form rather than substance that is evident on the face of the Offer, or an insignificant mistake that can be waived or corrected without prejudice to other Offerors. Examples of minor informalities include an Offeror's failure to:

(A) Return the correct number of signed Offers or the correct number of other documents required by the Solicitation Document;

(B) Sign the Offer in the designated block, provided a signature appears elsewhere in the Offer evidencing an intent to be bound; and

(C) Acknowledge receipt of an Addendum to the Solicitation Document, provided that it is clear on the face of the Offer that the Offeror received the Addendum and intended to be bound by its terms; or the Addendum involved did not affect price, quality, or delivery.

The District may correct a clerical error if the error is evident on the face of the Offer, or other documents submitted with the Offer, and the Offeror confirms the District's correction in writing. A clerical error is an Offeror's error in transcribing its Offer. Examples include typographical mistakes, errors in extending unit prices, transposition errors, arithmetical errors, instances in which the intended correct unit or amount is evident by simple arithmetic calculations (for example, a missing unit price may be established by dividing the total price for the units by the quantity of units for that item, or missing or incorrect total price for an item may be established by multiplying the unit price by the quantity when those figures are available in the Offer). Unit prices shall prevail over extended prices in the event of a discrepancy between extended prices and unit prices.

(a) The District may permit an Offeror to withdraw an Offer based on one or more clerical errors in the Offer only if the Offeror shows with objective proof and by clear and convincing evidence:

(A) The nature of the error;

(B) That the error is not a minor informality under this subsection or an error in judgment;

(C) That the error cannot be corrected or waived under subsection (b) of this section;

(D) That the Offeror acted in good faith in submitting an Offer that contained the claimed error and in claiming that the alleged error in the Offer exists;

(E) That the Offeror acted without gross negligence in submitting an Offer that contained a claimed error;

(F) That the Offeror will suffer substantial detriment if the District does not grant the Offeror permission to withdraw the Offer;

(G) That the District's or the public's status has not changed so significantly that relief from the forfeiture will work a substantial hardship on the District or the public it represents; and

(H) That the Offeror promptly gave notice of the claimed error to the District.

(b) The criteria in subsection (2)(c) of this rule shall determine whether the District will permit an Offeror to withdraw its Offer after Closing. These criteria shall apply to the question of whether the District shall permit an Offeror to withdraw its Offer without forfeiture of its bid bond (or other bid or proposal security), or without liability to the District based on the difference between the amount of the Offeror's Offer and the amount of the Contract actually awarded by the District, whether by award to the next lowest Responsive and Responsible bidder, the most advantageous Responsive and Responsible Proposer, or by resort to a new solicitation.

(3) Rejection for Mistakes. The District shall reject any Offer in which a mistake is evident on the face of the Offer and the intended correct Offer is not evident or cannot be substantiated from documents accompanying the Offer.

(4) Identification of Mistakes After Award. The procedures and criteria set forth above are Offeror's only opportunity to correct mistakes or withdraw Offers because of a mistake. Following award, an Offeror is bound by its Offer, and may withdraw its Offer or rescind a Contract entered into pursuant to this division 47 only to the extent permitted by applicable law.

PPS 47-0480 Time for District Acceptance

An Offeror's Offer is a Firm Offer, irrevocable, valid, and binding on the Offeror for not less than thirty (30) days following Closing unless otherwise specified in the Solicitation Document.

PPS 47-0490 Extension of Time for Acceptance of Offer

The District may request, orally or in writing, that Offerors extend, in writing, the time during which the District may consider their Offer(s). If an Offeror agrees to such extension, the Offer shall continue as a Firm Offer, irrevocable, valid, and binding on the Offeror for the agreed-upon extension period.

QUALIFICATIONS AND DUTIES

PPS 47-0500 Responsibility of Bidders and Proposers

(1) Determination. Before awarding a Contract, the District shall determine that the bidder submitting the lowest bid or Proposer submitting the most advantageous proposal is Responsible. The District shall use the standards set forth in ORS 279B.110 and PPS 47-0640(1)(c)(F) to determine if an Offeror is Responsible. In the event the District determines a bidder or Proposer is not Responsible, it shall prepare a written determination of non-Responsibility as required by ORS 279B.110 and shall reject the Offer.

PPS 47-0525 Qualified Products Lists

(1) Authority. The District may develop and maintain a qualified products list pursuant to ORS 279B.115 in instances in which the testing or examination of goods before initiating a procurement is necessary or desirable in order to best satisfy the requirements of the District. For purposes of this section, "goods" includes products that have associated or incidental service components, such as supplier warranty obligations or maintenance service programs.

(2) Notice. In the initial development of any qualified products list, the District shall give public notice, in accordance with PPS 47-0300, of the opportunity for potential Contractors, sellers, or suppliers to submit goods for testing and examination to determine their acceptability for inclusion on the list, and may solicit in writing representative groups of potential Contractors, sellers, or suppliers to submit goods for the testing and examination. Any potential Contractor, seller, or supplier, even though not solicited, may offer its goods for consideration.

(3) Inclusion to Be Based on Tests or Examinations. The District's inclusion of goods on a qualified products list shall be based on the results of tests or examinations. Notwithstanding any provision of ORS 192.410 through 192.505, the District may make the test or examination results public in a manner that protects the identity of the potential Contractor, seller, or supplier that offered the goods for testing or

examination, including by using only numerical designations. Notwithstanding any provision of ORS 192.410 through 192.505, the District may keep confidential trade secrets, test data, and similar information provided by a potential Contractor, seller, or supplier if so requested in writing by the potential Contractor, seller, or supplier.

(4) List Does Not Constitute Prequalification. The inclusion of goods on a qualified products list does not constitute and may not be construed as a prequalification under ORS 279B.120 and 279B.125 of any prospective Contractor, seller, or supplier of goods on the qualified products list.

PPS 47-0550 Prequalification of Prospective Offerors; Pre-Negotiation of Contract Terms and Conditions

(1) Prequalification of Prospective Offerors. Pursuant to ORS 279B.120 and 279B.125, the District may prequalify prospective bidders or Proposers to submit Bids or Proposals for Public Contracts to provide particular types of goods or services.

(2) Notice of Prequalification. The District shall, in response to the receipt of a prequalification application submitted under section (1) of this rule, notify the prospective bidder or Proposer whether the prospective bidder or Proposer is qualified based on the standards of responsibility listed in section (7), the type and nature of Contracts that the prospective bidder or Proposer is qualified to compete for and the time period for which the prequalification is valid. If the District does not prequalify a prospective bidder or Proposer as to any Contracts covered by the prequalification process, the notice shall specify which of the standards of responsibility listed in section (7) the prospective bidder or Proposer failed to meet. Unless the reasons are specified, the prospective bidder or Proposer shall be deemed to have been prequalified in accordance with the application.

(3) Revocation of Prequalification. If the District subsequently discovers that a prospective bidder or Proposer that prequalified under sections (1) and (2) of this rule is no longer qualified, the District may revoke the prequalification upon reasonable notice to the prospective bidder or Proposer, except that a revocation is invalid as to any Contract for which an advertisement for Bids or Proposals has already been issued. Notwithstanding this prohibition against revocation of prequalification, the District may determine that a prequalified Offeror is not Responsible prior to Contract award.

(4) Application. When the District permits or requires prequalification of bidders or Proposers, a prospective bidder or Proposer who wishes to prequalify shall submit a prequalification application to the District on a form prescribed by the District. Upon receipt of a prequalification application, the District shall investigate the prospective bidder or Proposer as necessary to determine whether the prospective bidder or Proposer is qualified. The determination shall be made in less than 30 days, if practicable, if the prospective bidder or Proposer requests an early decision to allow the prospective bidder or Proposer as much time as possible to prepare a bid or proposal for a Contract that has been advertised. In making its determination, the District shall consider only the applicable standards of responsibility listed in section (7). The District shall promptly notify the prospective bidder or Proposer whether the prospective bidder or Proposer is qualified.

(5) Contents of Notice. If the District finds that a prospective bidder or Proposer is qualified, the notice shall state the type and nature of Contracts that the prospective bidder or Proposer is qualified to compete for and the period of time for which the prequalification is valid. If the District finds that the prospective bidder or Proposer is not qualified as to any Contracts covered by the rule, resolution, ordinance, or other regulation, the notice shall specify the reasons given under section (7) below. To be entitled to a hearing under PPS 47-0760, a prospective bidder or Proposer shall, within three business days after receipt of the notice, notify the District that the prospective bidder or Proposer demands a hearing under PPS 47-0760.

(6) Revocation or Reissuance Process. If the District has reasonable cause to believe that there has been a substantial change in the conditions of a prequalified prospective bidder or Proposer and that the prospective bidder or Proposer is no longer qualified or is less qualified, the District may revoke or may revise and reissue the prequalification after reasonable notice to the prequalified prospective bidder or

Proposer. The notice shall specify the reasons given under section (2) for revocation or revision of the prequalification of the prospective bidder or Proposer and inform the prospective bidder or Proposer of the right to a hearing under PPS 47-0760. To be entitled to a hearing under PPS 47-0760, a prospective bidder or Proposer shall, within three business days after receipt of the notice, notify the District that the prospective bidder or Proposer demands a hearing under PPS 47-0760. A revocation or revision does not apply to any Contract for which an advertisement for Bids or Proposals was issued before the date the notice of revocation or revision was received by the prequalified prospective bidder or Proposer.

(7) Standards of Responsibility. In determining whether a bidder or Proposer has met the standards of responsibility pursuant to ORS 279B.110(2), the District shall consider whether a bidder or Proposer has:

(a) Available the appropriate financial, material, equipment, facility, and personnel resources and expertise, or ability to obtain the resources and expertise, necessary to indicate the capability of the bidder or Proposer to meet all contractual responsibilities;

(b) A satisfactory record of performance. The District shall document the record of performance of a bidder or Proposer if the District finds the bidder or Proposer non-responsible under this section;

(c) A satisfactory record of integrity. The District shall document the record of integrity of a bidder or Proposer if the District finds the bidder or Proposer non-responsible under this section;

(d) Qualified legally to contract with the District;

(e) Supplied all necessary information in connection with the inquiry concerning responsibility. If a bidder or Proposer fails to promptly supply information requested by the District concerning responsibility, the District shall base the determination of responsibility on any available information or may find the bidder or Proposer non-responsible; and

(f) Not been Debarred by the District under PPS 47-0575.

(8) Pre-Negotiation. The District may pre-negotiate some or all Contract terms and conditions including prospective Proposer Contract forms such as license agreements, maintenance and support agreements, or similar documents for use in future procurements. Such pre-negotiation of Contract terms and conditions (including prospective Proposer forms) may be part of the prequalification process of a Proposer in section 1 or the pre-negotiation may be a separate process and not part of the prequalification process. Unless required as part of the prequalification process, the failure of the District and the prospective Proposer to reach agreement on pre-negotiated Contract terms and conditions does not prohibit the prospective Proposer from responding to procurements. The District may agree to different pre-negotiated Contract terms and conditions with different prospective Proposers. When the District has pre-negotiated different terms and conditions with Proposers or, when permitted, Proposers offer different terms and conditions, the District may consider the terms and conditions in the proposal evaluation process.

PPS 47-0560 Request for Qualifications ("RFQ")

For purposes of this section, an RFQ may be used without the RFQ constituting a prequalification pursuant to PPS 47-0550, if the District establishes the RFQ to determine whether competition exists to perform the needed services or to establish a nonbinding, open list of qualified Contractors in addition to the general public and in order to expand the pool of qualified Contractors, prior to issuing an RFP. If the District establishes a closed, exclusive, or binding list of qualified Contractors, then the District shall comply with section (1) of this rule. The District is not required to issue an RFQ and may elect to forego using an RFQ before issuing an RFP.

(1) Content of RFQ. At a minimum, the RFQ shall describe the particular specialty desired, the qualifications the Contractor(s) shall have in order to be considered, and the evaluation factors and their relative importance. The RFQ may require information including, but not limited to: the Contractor's particular capability to perform the required services; the number of experienced staff available to perform

the required services, including specific qualifications and experience of personnel; a list of similar services the Contractor has completed, with references concerning past performance; and any other information deemed necessary by the District to evaluate Contractor qualifications. All RFQs shall:

(a) Be in writing;

(b) Provide that the District may, at any time during the Solicitation process, reject any or all Proposals or cancel the Solicitation without liability if it is in the public interest to do so; and

(c) Provide that the District is not responsible for any costs of any Proposers incurred while submitting Proposals, and that all Proposers who respond to solicitations do so solely at their own expense, unless compensation is expressly provided for in the Solicitation Document.

(2) Pre-Submission Meeting. A qualifications pre-submission meeting, voluntary or mandatory, may be held for all interested Contractors to discuss the proposed services. The RFQ shall include the date, time, and place of the meeting(s).

(3) Notice and Opportunity to Submit RFQ. Unless the RFQ establishes that competition does not exist or unless the Solicitation process is canceled or all qualification statements are rejected, all respondents who met the published qualifications shall receive a notice, or other materials as appropriate, in addition to the general public, of any required services and have an opportunity to submit a proposal in response to the District's subsequent RFP.

PPS 47-0575 Debarment of Prospective Offerors

(1) Generally. The District may Debar prospective Offerors for the reasons of discriminating against a subcontractor in the awarding of a Contract because the subcontractor is a minority, women or emerging small business enterprise, a disadvantage business enterprise or a veteran-owned business as set forth in ORS 279A.110, or after providing notice and the opportunity for hearing as set forth in Sections (5)-(8).

(2) Responsibility. Notwithstanding the limitation on the term for Debarment in ORS 279B.130(1)(b), the District may determine that a previously Debarred Offeror is not Responsible prior to Contract award.

(3) Imputed Knowledge. The District may attribute improper conduct of a Person or their affiliate or affiliates having a contract with a prospective Offeror to the prospective Offeror for purposes of Debarment where the impropriety occurred in connection with the Person's duty for or on behalf of, or with the knowledge, approval, or acquiescence of, the prospective Offeror.

(4) Limited Participation. The District may allow a Debarred Person to participate in solicitations and Contracts on a limited basis during the Debarment period upon written determination that participation is advantageous to the District. The determination shall specify the factors on which it is based and define the extent of the limits imposed.

(5) Debarment Process. The District may Debar a prospective bidder or Proposer from consideration for award of the District's Contracts for the reasons listed in section (6) of this rule after providing the prospective bidder or Proposer with notice and a reasonable opportunity to be heard.

(a) The District may not Debar a prospective bidder or Proposer under this section for more than three years.

(6) Reasons for Debarment. A prospective bidder or Proposer may be Debarred from consideration for award of the District's Contracts if:

(a) The prospective bidder or Proposer has been convicted of a criminal offense as an incident in obtaining or attempting to obtain a public or private contract or subcontract or in the performance of a public or private contract or subcontract.

(b) The prospective bidder or Proposer has been convicted under state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty that currently, seriously, and directly affects the prospective bidder's or Proposer's responsibility as a Contractor.

(c) The prospective bidder or Proposer has been convicted under state or federal antitrust statutes.

(d) The prospective bidder or Proposer has committed a violation of a Contract provision that is regarded by the District or the Construction Contractors Board to be so serious as to justify disqualification. A violation may include, but is not limited to, a failure to perform the terms of a Contract or an unsatisfactory performance in accordance with the terms of the Contract. However, a failure to perform or an unsatisfactory performance caused by acts beyond the control of the Contractor may not be considered to be a basis for Debarment.

(e) The prospective bidder or Proposer does not carry workers' compensation or unemployment insurance as required by statute.

(7) Written Debarment Decision Required. The District shall issue a written decision to Debar a prospective bidder or Proposer under this section. The decision shall:

(a) State the reasons for the action taken;

(b) Inform the Debarred prospective bidder or Proposer of the appeal rights of the prospective bidder or Proposer under PPS 47-0760; and

(c) Be mailed or otherwise furnished immediately to the Debarred prospective bidder or Proposer.

(8) A prospective bidder or Proposer that wishes to appeal Debarment shall, within three business days after receipt of notice of Debarment, notify the District that the prospective bidder or Proposer appeals the Debarment as provided in PPS 47-0760.

OFFER EVALUATION AND AWARD

PPS 47-0600 Offer Evaluation and Award

(1) District Evaluation. The District shall evaluate Offers only as set forth in the Solicitation Document pursuant to ORS 279B.055(6)(a) and 279B.060(6)(b) based on the requirements set forth in the ITB or RFP, and in accordance with applicable law. The District shall not evaluate Offers using any other requirement or criterion.

(a) Evaluation of Bids.

(A) Nonresident bidders: In determining the lowest Responsive Bid, the District shall apply the reciprocal preference set forth in ORS 279A.120(2)(b) and PPS 46-0310 for nonresident bidders.

(B) Public Printing: The District shall, for the purpose of evaluating Bids, apply the public printing preference set forth in ORS 282.210 (printing shall be performed within the state).

(C) Award When Bids are Identical: If the District determines that one or more Bids are identical under PPS 46-0300, the District shall award a Contract in accordance with the procedures set forth in PPS 46-0300.

(b) Evaluation of Proposals.

(A) Award When Proposals are Identical: If the District determines that one or more Proposals are identical under PPS 46-0300, the District shall award a Contract in accordance with the procedures set forth in PPS 46-0300.

(B) Public Printing: The District shall, for the purpose of evaluating Proposals, apply the public printing preference set forth in ORS 282.210 (printing shall be performed within the state).

(c) Recycled Materials. When procuring goods, the District shall give preference for Recycled Materials as set forth in ORS 279A.125 if:

(A) The Recycled Product is available;

(B) The Recycled Product meets applicable standards:

(C) The Recycled Product can be substituted for a comparable non-recycled product; and

(D) The Recycled Product's costs do not exceed the costs of non-recycled products by more than 5 percent, or a higher percentage if the District makes a written determination.

(2) Clarification of Bids or Proposals. After Opening, the District may conduct discussions with apparent Responsive Offerors for the purpose of clarification to assure full understanding of the Bids or Proposals. All Bids or Proposals, in the District's sole discretion, needing clarification shall be accorded such an opportunity. The District shall document clarification of any Offeror's bid or proposal in the Solicitation file.

(3) Negotiations.

(a) Bids. The District shall not negotiate with any bidder. After award of the Contract, the District and Contractor may only modify the Contract in accordance with PPS 47-0800.

(b) Requests for Proposals. The District may only conduct discussions or negotiate with Proposers in accordance with ORS 279B.060(6)(b) and PPS 47-0261. After award of the Contract, the District and Contractor may only modify the Contract in accordance with PPS 47-0800.

(4) Award.

(a) General. If awarded, the District shall award the Contract to the Responsible bidder submitting the lowest Responsive Bid or the Responsible Proposer submitting the most Advantageous Responsive proposal. The District may award by item, groups of items, or the entire Offer, provided such award is consistent with the Solicitation Document and in the public interest.

(b) Multiple Items. An Invitation to Bid or Request for proposal may call for pricing of multiple items of similar or related type with award based on individual line item, group total of certain items, a "market basket" of items representative of the District's expected purchases, or grand total of all items.

(A) Multiple Awards—Bids. Notwithstanding subsection (4)(a) of this rule, the District may award multiple Contracts under an Invitation to Bid in accordance with the criteria set forth in the Invitation to Bid. Multiple awards shall not be made if a single award will meet the District’s needs, including but not limited to adequate availability, delivery, service, or product compatibility and skills. A multiple award may be made if award to two or more bidders of similar goods or services is necessary for adequate availability, delivery, service or product compatibility and skills. Multiple awards may not be made for purpose of dividing the procurement into multiple solicitations, or to allow for user preference unrelated to utility or economy. A notice to prospective bidders that multiple Contracts may be awarded for any Invitation to Bid shall not preclude the District from awarding a single Contract for such Invitation to Bid.

(B) If an Invitation to Bid permits the award of multiple Contracts, the District shall specify in the Invitation to Bid the criteria it will use to choose from the multiple Contracts when purchasing goods or services.

(c) Multiple awards—Proposals.

(A) Notwithstanding subsection (4)(a) of this rule, the District may award multiple Contracts under a Request for proposal in accordance with the criteria set forth in the Request for proposal. Multiple awards shall not be made if a single award will meet the District's needs, including but not limited to adequate availability, delivery, service, or product compatibility. A multiple award may be made if award to two or more Proposers of similar goods or services is necessary for adequate availability, delivery, service or product compatibility and skills. Multiple awards may not be made for purpose of dividing the procurement into multiple solicitations, or to allow for user preference unrelated to obtaining the most Advantageous Contract. A notice to prospective Proposers that multiple Contracts may be awarded for any Request for proposal shall not preclude the District from awarding a single Contract for such Request for proposal.

(B) If a Request for proposal permits the award of multiple Contracts, the District shall specify in the Request for proposal the criteria it will use to choose from the multiple Contracts when purchasing goods or services, which may include consideration and evaluation of the Contract terms and conditions agreed to by the Contractors.

(d) Partial Awards. If after evaluation of Offers the District determines that an acceptable Offer has been received for only parts of the requirements of the Solicitation Document:

(A) The District may award a Contract for the parts of the Solicitation Document for which acceptable Offers have been received; or

(B) The District may reject all Offers and may issue a new Solicitation Document on the same or revised terms, conditions, and specifications.

(e) All or None Offers. The District may award all or none Offers if the evaluation shows an all-or-none award to be the lowest cost for Bids or the most Advantageous for Proposals of those submitted.

PPS 47-0610 Notice of Intent to Award

(1) Notice of Intent to Award. The District shall provide written notice of its intent to award to all bidders and Proposers pursuant to ORS 279B.135 at least seven (7) days before the award of a Contract, unless the District determines that circumstances justify prompt execution of the Contract, in which case the District may provide a shorter notice period. The District shall document the specific reasons for the shorter notice period in the Solicitation file.

(2) Finality. The District's award shall not be final until the later of the following:

(a) The expiration of the protest period provided pursuant to PPS 47-0740; or

(b) The District provides written responses to all timely-filed protests denying the protests and affirming the award.

PPS 47-0620 Documentation of Award

(1) Basis of Award. After award, the District shall make a record showing the basis for determining the successful Offeror as part of the District's Solicitation file.

(2) Contents of Award Record. The District's record shall include:

(a) For Bids.

(A) Bids;

(B) Completed bid tabulation sheet; and

(C) Written justification for any rejection of lower Bids.

(b) For Proposals.

(A) Proposals;

(B) The completed evaluation of the Proposals;

(C) Written justification for any rejection of higher-scoring Proposals; and

(D) If the District engaged in any of the methods of Contractor selection described in ORS 279B.060(6)(b) and PPS 47-0261, written documentation of the content of any discussions, negotiations, best and final Offers, or any other procedures the District used to select a Proposer to which the District awarded a Contract.

PPS 47-0630 Availability of Award Decisions

(1) Contract Documents. To the extent required by the Solicitation Document, the District shall deliver to the successful Offeror a Contract, a signed purchase order, Price Agreement, or other Contract documents as applicable.

(2) Availability of Award Decisions. A Person may obtain tabulations of awarded Bids or evaluation summaries of Proposals for a minimal charge in person or by submitting to the District a written request accompanied by payment. The requesting Person shall provide the Solicitation Document number and enclose a self-addressed, stamped envelope.

(3) Availability of Solicitation Files. After notice of intent to award, the District shall make Solicitation files available in accordance with applicable law.

PPS 47-0640 Rejection of an Offer

(1) Rejection.

(a) Any solicitation or procurement described in a solicitation may be canceled, or any or all Bids or Proposals may be rejected in whole or in part, when the cancellation or rejection is in the best interest of the District as determined by the District. The reasons for the cancellation or rejection shall be made part of the Solicitation file. The District is not liable to any bidder or Proposer for any loss or expense caused by or resulting from the cancellation or rejection of a solicitation, bid, proposal, or award. ORS 279B.100.

(b) The District shall reject an Offer upon the District's finding that the Offer:

(A) Is contingent on the District's acceptance of terms and conditions (including specifications) that differ from the Solicitation Document;

(B) Takes exception to terms and conditions (including specifications) set forth in the Solicitation Document;

(C) Attempts to prevent public disclosure of matters in contravention of the terms and conditions of the Solicitation Document or in contravention of applicable law;

(D) Offers goods or services that fail to meet the specifications of the Solicitation Document;

(E) Is late;

(F) Is not in substantial compliance with the Solicitation Document; or

(G) Is not in substantial compliance with all prescribed public procurement procedures.

(c) The District shall reject an Offer upon the District's finding that the Offeror:

(A) Has not been prequalified under ORS 279B.120 and the District required mandatory prequalification;

(B) Has been Debarred or has been disqualified under PPS 46-0210(4) (Disqualification);

(C) Has not met the requirements of ORS 279A.105 (emerging small business), if required by the Solicitation Document;

(D) Has not submitted properly executed Bid or proposal security as required by the Solicitation Document;

(E) Has failed to provide the certification of non-discrimination required under ORS 279A.110(4); or

(F) Is non-Responsible. Offerors are required to demonstrate their ability to perform satisfactorily under a Contract. Before awarding a Contract, the District shall have information that indicates that the Offeror meets the applicable standards of Responsibility. To be a Responsible Offeror, the District shall determine under ORS 279B.110 that the Offeror:

(i) Has available the appropriate financial, material, equipment, facility and personnel resources, and expertise, or ability to obtain the resources and expertise, necessary to meet all contractual responsibilities;

(ii) Has completed previous contracts of a similar nature with a satisfactory record of performance. A satisfactory record of performance means that to the extent the costs associated with and time available to perform a previous contract were within the Offeror's control, the Offeror stayed within the time and budget allotted for the procurement, and otherwise performed the contract in a satisfactory manner. The District should carefully scrutinize an Offeror's record of contract performance if the Offeror is or recently has been materially deficient in contract performance. In reviewing the Offeror's performance, the District should determine whether the Offeror's deficient performance was expressly excused under the terms of the contract, or whether the Offeror took appropriate corrective action. The District may review the Offeror's performance on both private and public contracts in determining the Offeror's record of contract performance. The District shall make its basis for determining an Offeror non-Responsible under this section part of the Solicitation file as required by ORS 279B.110(2)(b).

(iii) Has a satisfactory record of integrity. An Offeror may lack integrity if the District determines the Offeror demonstrates a lack of business ethics, such as violation of state environmental laws or false certifications made to the District. The District may find an Offeror non-Responsible based on the lack of integrity of any person having influence or control over the Offeror (such as a key employee of the Offeror that has the authority to significantly influence the Offeror's performance of the Contract or a parent company, predecessor, or successor person). The standards for Debarment under ORS 279B.130 may be used to determine an Offeror's integrity. The District may find an Offeror non-responsible based on previous convictions of offenses related to obtaining or attempting to obtain a contract or subcontract, or in connection with the Offeror's performance of a contract or subcontract. The District shall make its basis for determining that an Offeror is non-Responsible under this section part of the Solicitation file as required by ORS 279B.110(2)(c);

(iv) Is legally qualified to contract with the District;

(v) Has attested in writing that the Offeror complied with the tax laws of this state and of political subdivisions of this state; and

(vi) Has supplied all necessary information in connection with the inquiry concerning Responsibility. If the Offeror fails to promptly supply information requested by the District concerning Responsibility, the District shall base the determination of responsibility on any available information, or may find the Offeror non-Responsible.

(2) Required Tax Certification. For the purposes of subparagraph (1)(c)(F)(v) of this rule:

(A) The period for which the Offeror shall attest that it complied with the applicable tax laws shall extend no fewer than six years into the past from the date of the Closing.

(B) Tax laws include, but are not limited to, ORS 305.620, ORS chapters 316, 317 and 318, any tax provisions imposed by a political subdivision that apply to the Offeror or to the performance of the Contract, and any rules and regulations that implement or enforce those tax laws.

(C) The District may exercise discretion in determining whether a particular form of attesting to compliance with the tax laws is "credible and convenient" under ORS 279B.110(2)(e), taking into consideration the circumstances in which the attestation is made and the consequences of making a false attestation. Therefore, a Contracting Agency may accept forms of attestation that range from a notarized statement to a less formal document that records the Offeror's attestation. However, State Contracting Agencies may not accept the certificate of compliance with tax laws required by ORS 305.385 unless that certificate embraces, in addition to the tax laws described in ORS 305.380, the tax laws of political subdivisions.

(3) Form of Business Entity. For purposes of this rule, the District may investigate any Person submitting an Offer. The investigation may include that Person's officers, directors, owners, affiliates, or any other Person acquiring ownership of the Person to determine application of this rule or to apply the Debarment provisions of this rule.

PPS 47-0650 Rejection of All Offers

(1) Rejection. The District may reject all Offers when the rejection is in the best interest of the District as determined by the District. The reasons for the rejection shall be made part of the Solicitation file. The District is not liable to any bidder or Proposer for any loss or expense caused by or resulting from the cancellation or rejection of a solicitation, bid, proposal, or award. ORS 279B.100. The District shall notify all Offerors of the rejection of all Offers, along with the reasons for rejection of all Offers.

(2) Criteria. The District may reject all Offers based on the following criteria:

(a) The content of or an error in the Solicitation Document or the procurement process unnecessarily restricted competition for the Contract;

(b) The price, quality or performance presented by the Offerors are too costly or of insufficient quality to justify acceptance of any Offer;

(c) Misconduct, error, or ambiguous or misleading provisions in the Solicitation Document threaten the fairness and integrity of the competitive process;

(d) Causes other than legitimate market forces threaten the integrity of the competitive process. These causes may include, without limitation, those that tend to limit competition, such as restrictions on competition, collusion, corruption, unlawful anti-competitive conduct, and inadvertent or intentional errors in the Solicitation Document;

(e) The District cancels the procurement or solicitation in accordance with PPS 47-0660; or

(f) Any other circumstance indicating that awarding the Contract would not be in the public interest.

PPS 47-0660 Cancellation of Procurement or Solicitation

(1) Cancellation in the District Interest. The District may cancel a procurement or solicitation when the cancelation is in the best interest of the District as determined by the District. The reasons for the cancellation shall be made part of the Solicitation file. The District is not liable to any bidder or Proposer for any loss or expense caused by or resulting from the cancellation or rejection of a solicitation, bid, proposal, or award.

(2) Notice of Cancellation Before Opening. If the District cancels a procurement or solicitation prior to Opening, the District shall provide written notice of cancellation in the same manner that the District initially provided notice of the Solicitation. Such notice of cancellation shall:

(a) Identify the Solicitation Document;

(b) Briefly explain the reason for cancellation; and

(c) If appropriate, explain that an opportunity will be given to compete on any re-solicitation.

(3) Notice of Cancellation After Opening. If the District cancels a procurement or solicitation after Opening, the District shall provide written notice of cancellation to all Offerors who submitted Offers.

PPS 47-0670 Disposition of Offers if Procurement or Solicitation Canceled

(1) Prior to Opening. If the District cancels a procurement or solicitation prior to Opening, the District shall return all Offers it received to Offerors unopened, provided the Offeror submitted its Offer in a hard copy format with a clearly visible return address. If there is no return address on the envelope, the District shall open the Offer to determine the source and then return it to the Offeror. For Electronic Offers, the District shall delete the Offers from the Contracting Agency's Electronic Procurement System or information technology system.

(2) After Opening. If the District cancels a procurement or solicitation after Opening, the District:

(a) May return Proposals in accordance with ORS 279B.060(6)(c); and

(b) Shall keep bids in the Solicitation file.

(3) Rejection of All Offers. If the District rejects all Offers, the District shall keep all Proposals and Bids in the Solicitation file.

LEGAL REMEDIES

PPS 47-0700 Protests and Judicial Review of Special Procurements

(1) Purpose. An Affected Person may protest the approval of a Special procurement. Pursuant to ORS 279B.400(1), before seeking judicial review of the approval of a Special procurement, an Affected Person shall file a written protest with the Superintendent and exhaust all administrative remedies.

(2) Delivery. Notwithstanding the requirements for filing a writ of review under ORS chapter 34 pursuant to ORS 279B.400(4)(a), an Affected Person shall deliver a written protest to the District within seven (7) days after the first date of public notice of the approval of a Special procurement by the District, unless a different protest period is provided in the public notice of the approval of a Special procurement.

(3) Content of Protest. The written protest shall include:

(a) A detailed statement of the legal and factual grounds for the protest;

(b) A description of the resulting harm to the Affected Person; and

(c) The relief requested.

(4) Contract Review Board Response. The Contract Review Board shall not consider an Affected Person's protest of the approval of a Special procurement submitted after the timeline established for submitting such protest under this rule or such different time period as may be provided in the public notice of the approval of a Special procurement. The Contract Review Board shall issue a written disposition of the protest in a timely manner. If the Contract Review Board upholds the protest, in whole or in part, it may in its sole discretion implement the sustained protest in the approval of the Special procurement, or revoke the approval of the Special procurement.

(5) Judicial Review. An Affected Person may seek judicial review of the Superintendent's decision relating to a protest of the approval of a Special procurement in accordance with ORS 279B.400.

PPS 47-0710 Protests and Judicial Review of Sole-Source procurements

(1) Purpose. For sole-source procurements requiring public notice under PPS 47-0275, an Affected Person may protest the determination of the Superintendent or designee that the goods or services or class of goods or services are available from only one source. Pursuant to ORS 279B.420(3)(f), before seeking judicial review, an Affected Person shall file a written protest with the Superintendent or designee and exhaust all administrative remedies.

(2) Delivery. Unless otherwise specified in the public notice of the sole-source procurement, an Affected Person shall deliver a written protest to the Superintendent or designee within seven days after the first date of public notice of the sole-source procurement, unless a different protest period is provided in the public notice of a sole-source procurement.

(3) Content of Protest. The written protest shall include:

(a) A detailed statement of the legal and factual grounds for the protest;

(b) A description of the resulting harm to the Affected Person; and

(c) The relief requested.

(4) Response. The Superintendent or designee shall not consider an Affected Person's sole-source procurement protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the public notice of the sole-source procurement. The Superintendent or designee shall issue a written disposition of the protest in a timely manner. If the Superintendent or designee upholds the protest, in whole or in part, the Superintendent shall not enter into a sole-source Contract.

(5) Judicial Review. Judicial review of the Superintendent's or designee's disposition of a sole-source procurement protest shall be in accordance with ORS 279B.420.

PPS 47-0720 Protests and Judicial Review of Multi-Tiered and Multistep Solicitations

(1) Purpose. An Affected Offeror may protest exclusion from the competitive Range or from subsequent tiers or steps of a solicitation in accordance with the applicable Solicitation Document. When such a protest is permitted by the Solicitation Document, then pursuant to ORS 279B.420(3)(f), before seeking judicial review, an Affected Offeror shall file a written protest with the District and exhaust all administrative remedies.

(2) Basis for Protest. An Affected Offeror may only protest its exclusion from a tier or step of competition only if the Offeror is Responsible and submitted a Responsive Offer and, but for the District's mistake in evaluating the Offerors or other Offerors' Offers, the protesting Offeror would have been eligible to participate in the next tier or step of competition. For example, the protesting Offeror shall claim it is eligible for inclusion in the competitive Range if all ineligible higher-scoring Offerors are removed from consideration, and that those ineligible Offerors are ineligible for inclusion in the competitive Range because their Proposals were not Responsive, or the District committed a substantial violation of a provision in the

Solicitation Document or of an applicable procurement statute or administrative rule, and the protesting Offeror was unfairly evaluated and would have, but for such substantial violation, been included in the competitive Range.

(3) Delivery. Unless otherwise specified in the Solicitation Document, an Affected Offeror shall deliver a written protest to the District within seven (7) days after issuance of the notice of the competitive Range or notice of subsequent tiers or steps.

(4) Content of Protest. The Affected Offeror's protest shall be in writing and shall specify the grounds upon which the protest is based.

(5) District Response. The District shall not consider an Affected Offeror's multi-tiered or multistep solicitation protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the Solicitation Document. The District shall issue a written disposition of the protest in a timely manner. If the District upholds the protest, in whole or in part, the District may in its sole discretion either issue an Addendum under PPS 47-0430 reflecting its disposition or cancel the procurement or solicitation under PPS 47-0660.

(6) Judicial Review. Judicial review of the District's decision relating to a multi-tiered or multistep solicitation protest shall be in accordance with ORS 279B.420.

PPS 47-0730 Protests and Judicial Review of Solicitations

(1) Purpose. A prospective Offeror may protest the procurement process or the Solicitation Document for a Contract solicited under ORS 279B.055, 279B.060, and 279B.085 as set forth in ORS 279B.405(2). Pursuant to ORS 279B.405(3), before seeking judicial review, a prospective Offeror shall file a written protest with the District and exhaust all administrative remedies.

(2) Delivery. Unless otherwise specified in the Solicitation Document, a prospective Offeror shall deliver a written protest to the District not less than ten (10) days prior to Closing.

(3) Content of Protest. The prospective Offeror's written protest shall include:

- **(a)** Sufficient information to identify the Solicitation that is the subject of the protest;
- **(b)** The grounds that demonstrate how the procurement process is contrary to law or how the Solicitation Document is unnecessarily restrictive, is legally flawed, or improperly specifies a Brand Name;
- **(c)** Evidence or supporting documentation that supports the grounds on which the protest is based; and
- **(d)** A statement of the desired changes to the procurement process or the Solicitation Document that the prospective Offeror believes will remedy the conditions upon which the prospective Offeror based its protest.

(4) District Response. The District shall not consider a Prospective Offeror's solicitation protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the Solicitation Document. The District shall consider the protest if it is timely filed and meets the conditions set forth in section (3) of this rule. The District shall issue a written disposition of the protest no fewer than three business days before Offers are due. If the District upholds the protest, in whole or in part, the District may in its sole discretion either issue an Addendum reflecting its disposition under PPS 47-0430 or cancel the procurement or solicitation under PPS 47-0660.

(5) Extension of Closing. If the District receives a protest from a prospective Offeror in accordance with this rule, the District may extend Closing if the District determines an extension is necessary to consider and respond to the protest.

(6) Clarification. Prior to the deadline for submitting a protest, a prospective Offeror may request that the District clarify any provision of the Solicitation Document. The District's clarification to an Offeror, whether orally or in writing, does not change the Solicitation Document and is not binding on the District unless the District amends the Solicitation Document by Addendum.

(7) Judicial Review. Judicial review of the District's decision relating to a solicitation protest shall be in accordance with ORS 279B.405.

(8) Failure to Protest or Request a Clarification Precludes Protest of Award on Such Issue. An Offeror cannot protest an award based on any issue that could have, but was not, raised as a Request for Clarification or Protest of solicitation pursuant to this section.

PPS 47-0740 Protests and Judicial Review of Contract Award

(1) Purpose. An Offeror may protest the award of a Contract, or the intent to award a Contract, whichever occurs first, if:

(a) The bidder or Proposer is adversely affected because the bidder or Proposer would be eligible to be awarded the Public Contract in the event that the protest were successful; and

(b) The reason for the protest is that:

(A) All lower Bids or higher ranked Proposals are non-Responsive;

(B) The District has failed to conduct the evaluation of Proposals in accordance with the criteria or processes described in the Solicitation materials;

(C) The District has abused its discretion in rejecting the protestor's bid or proposal as non-Responsive; or

(D) The District's evaluation of Bids or Proposals or the District's subsequent determination of award is otherwise in violation of these rules or the Public Contracting Code.

(2) Delivery. An Offeror shall file a written protest with the District and exhaust all administrative remedies before seeking judicial review of the District's Contract award decision. Unless otherwise specified in the Solicitation Document, an Offeror shall deliver a written protest to the District within seven (7) days after the award of a Contract, or issuance of the notice of intent to award the Contract, whichever occurs first.

(3) Content of Protest. An Offeror's written protest shall specify the grounds for the protest to be considered by the District pursuant to section (1) of this rule.

(4) District Response. The District shall not consider an Offeror's Contract award protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the Solicitation Document. The District shall issue a written disposition of the protest in a timely manner. If the District upholds the protest, in whole or in part, the District may in its sole discretion either award the Contract to the successful protestor or cancel the procurement or solicitation.

(5) Judicial Review. Judicial review of the District's decision relating to a Contract award protest shall be in accordance with ORS 279B.415.

PPS 47-0745 Protests and Judicial Review of Qualified Products List Decisions

(1) Purpose. A prospective Offeror may protest the District's decision to exclude the prospective Offeror's goods from the District's qualified products list under ORS 279B.115. A prospective Offeror shall file a written protest and exhaust all administrative remedies before seeking judicial review of the District's qualified products list decision.

(2) Delivery. Unless otherwise stated in the District's notice to prospective Offerors of the opportunity to submit goods for inclusion on the qualified products list, a prospective Offeror shall deliver a written protest

to the District within seven (7) days after issuance of the District's decision to exclude the prospective Offeror's goods from the qualified products list.

(3) Content of Protest. The prospective Offeror's protest shall be in writing and shall specify the grounds upon which the protest is based.

(4) District Response. The District shall not consider a prospective Offeror's qualified products list protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the District's notice to prospective Offerors of the opportunity to submit goods for inclusion on the qualified products list. The District shall issue a written disposition of the protest in a timely manner. If the District upholds the protest, it shall include the successful protestor's goods on the qualified products list.

(5) Judicial Review. Judicial review of the District's decision relating to a qualified products list protest shall be in accordance with ORS 279B.420.

PPS 47-0750 Judicial Review of Other Violations

Any violation of ORS 279A or 279B by the District, for which no judicial remedy is otherwise provided in the Public Contracting Code, is subject to judicial review as set forth in ORS 279B.420.

PPS 47-0760 Review of Prequalification and Debarment Decisions

(1) Upon receipt of a notice from the District of a prequalification decision under ORS 279B.125 or of a decision to Debar under ORS 279B.130, a prospective bidder or Proposer that wishes to appeal the decision shall, within three days after receipt of the notice, notify the District that the prospective bidder or Proposer appeals the decision as provided in this section.

(2) Immediately upon receipt of the prospective bidder's or Proposer's notice of appeal, the District shall notify the appropriate Local Contract Review Board.

(3) Upon the receipt of notice from the District under section (2) of this rule, the Contract Review Board shall promptly notify the Person appealing and the District of the time and place of the hearing. The Contract Review Board shall conduct the hearing and decide the appeal within 30 days after receiving the notice from the District. The Contract Review Board shall set forth in writing the reasons for the hearing decision.

(4) At the hearing, the Contract Review Board shall consider de novo the notice of denial, revocation, or revision of a prequalification or the notice of Debarment, the standards of responsibility listed in ORS 279B.110(2) on which the District based the denial, revocation or revision of the prequalification or the reasons listed in ORS 279B.130(2) on which the District based the Debarment, and any evidence provided by the parties. Hearings before the Contract Review Board shall be conducted under rules of procedure adopted by the Contract Review Board.

(5) The Contract Review Board may allocate the Contract Review Board's costs for the hearing between the Person appealing and the District. The allocation shall be based on facts found by the Contract Review Board and stated in the final order that, in the Contract Review Board's opinion, warrant such allocation of costs. If the final order does not allocate the costs for the hearing, the costs shall be paid as follows:

- **(a)** If the decision to deny, revoke, or revise a prequalification of a Person as a bidder or the decision to Debar a Person is upheld, the costs shall be paid by the Person appealing the decision.
- **(b)** If the decision to deny, revoke, or revise a prequalification of a Person as a bidder or the decision to Debar a Person is reversed, the costs shall be paid by the District.

(6) Judicial review of the District's prequalification and Debarment decisions shall be as set forth in ORS 279B.425.

PPS 47-0800 Amendments to Goods or Services Contracts and Price Agreements

(1) Generally. The District may amend a Contract for goods or services without additional competition in any of the following circumstances:

(a) The amendment is within the scope of the procurement as described in the Solicitation Documents, if any, or if no Solicitation Documents, as described in the sole source notice or the approved Special procurement, if any. An amendment is not within the scope of the procurement if the District determines that if it had described in the procurement the changes to be made by the amendment, it would likely have increased competition or affected award of the Contract.

(b) These rules otherwise permit the District to award a Contract without competition for the goods or services to be procured under the amendment.

(c) The amendment is necessary to comply with a change in law that affects performance of the Contract.

(d) The amendment results from renegotiation of the terms and conditions, including the Contract Price, of a Contract and the amendment is Advantageous to the District, subject to all of the following conditions:

(A) The goods or services to be provided under the amended Contract are the same as the goods or services to be provided under the unamended Contract.

(B) The District determines that, with all things considered, the amended Contract is at least as favorable to the District as the unamended Contract.

(C) The amended Contract does not have a total term greater than allowed in the Solicitation Documents, if any, or if no Solicitation Documents, as described in the sole source notice or the approved Special procurement, if any, after combining the initial and extended terms. For example, a one-year Contract described as renewable each year for up to four additional years, may be renegotiated as a two to five-year Contract, but not beyond a total of five years.

(2) Small or Intermediate Contract. A Contracting Agency may amend a Contract awarded as a small or intermediate procurement pursuant to section (1) of this rule, provided that the total increase in Contract price does not exceed 125 percent of the maximum threshold for small procurements or for intermediate procurements.

(3) Price Agreements. The District may amend a Price Agreement as follows:

(a) As permitted by the Price Agreement;

(b) If the circumstances set forth in ORS 279B.140(2) exist, as follows:

(A) The District fails to receive funding or appropriations to sustain purchases at the levels contemplated at the time of contracting; or

(B) The applicable program is terminated or the law changes so that purchases under the Price Agreement are no longer authorized or appropriate for the District's use; or

(c) As permitted by applicable law.

(4) Amendments That Would Cause a Contract to Exceed the Superintendent's Authority. An amendment to a contract approved by the Superintendent that would cause the total Contract Price to exceed the Superintendent's delegated authority to approve contracts under PPS 45-0200 shall be approved by the School Board except as provided in PPS 45-0200.

END OF DIVISION 47

DIVISION 48

CONSULTANT SELECTION: ARCHITECTURAL, ENGINEERING, PHOTOGRAMMETRIC MAPPING, TRANSPORTATION PLANNING OR LAND SURVEYING SERVICES AND RELATED SERVICES CONTRACTS

PPS 48-0100 Application

These division 48 rules apply to the screening and selection of Architects, Engineers, Photogrammetrists, Transportation Planners, Land Surveyors, and providers of Related services under Contracts, and set forth the following procedures:

(1) Procedures through which the District selects Consultants to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, Land Surveying services, or Related services; and

(2) Two-tiered procedures for selection of Photogrammetrists, Transportation Planners, Land Surveyors, and providers of Related services for certain public improvements owned and maintained by the District.

PPS 48-0110 Definitions

In addition to the definitions set forth in PPS 46-0110, the following definitions apply to these division 48 rules:

(1) "Architect" is defined in ORS 279C.100 and means a Person who is registered and holds a valid certificate in the practice of architecture in the State of Oregon, as provided under ORS 671.010 through 671.220, and includes, without limitation, the terms "Architect," "licensed Architect," and "registered Architect."

(2) "Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services" is defined in ORS 279C.100 and means professional services that are required to be performed by an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor.

(3) "Consultant" means an Architect, Engineer, Photogrammetrist, Transportation Planner, Land Surveyor, or provider of Related services. A Consultant includes a business entity that employs Architects, Engineers, Photogrammetrists, Transportation Planners, Land Surveyors, or providers of Related services, or any combination of the foregoing. Provided, however, when the District is entering into a direct Contract under PPS 48-0200(1)(c) or (d), the "Consultant" shall be an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor, as required by ORS 279C.115(1).

(4) "Engineer" means an individual who is registered and holds a valid certificate in the practice of land engineering in the State of Oregon, as provided under ORS 672.002 to 672.325, and includes all terms listed in ORS 672.002(2).

(5) "Estimated Fee" means The District's reasonably projected fee to be paid for a Consultant's services under the anticipated Contract, excluding all anticipated reimbursable or other non-professional fee expenses. The Estimated Fee is used solely to determine the applicable Contract solicitation method and is distinct from the total amount payable under the Contract.

(6) "Land Surveyor" means a Person who is registered and holds a valid certificate in the practice of land surveying in the State of Oregon, as provided under ORS 672.002 to 672.325, and includes all terms listed in ORS 672.002(5).

(7) "Photogrammetric Mapping" means an evaluating and measuring of land that is limited to the determination of the topography, area, contours, and location of planimetric features, by using photogrammetric methods or similar remote sensing technology, including but not limited to using existing ground control points incidental to the photogrammetric or remote sensing mapping process.

(8) "Photogrammetrist" means an individual who is registered and holds a valid certificate to practice photogrammetric mapping in the State of Oregon, as provided under ORS 672.002 to 672.325, and includes all terms listed in ORS 672.002(5).

(9) "Price Agreement" for purposes of this division 48 is limited to mean an agreement related to the procurement of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, under agreed-upon terms and conditions, including, but not limited to terms and conditions of later work orders or task orders for project-specific services, and which may include Consultant compensation information, with:

(a) No guarantee of a minimum or maximum purchase; or

(b) An initial work order, task order, or minimum purchase, combined with a continuing Consultant obligation to provide Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services in which the District does not guarantee a minimum or maximum additional purchase.

(10) "Project" means all components of the District's planned undertaking that gives rise to the need for a Consultant's Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, under a Contract.

(11) "Related Services" means Personal services, other than Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, or Land Surveying services that are related to planning, designing, engineering, or overseeing public improvement projects or components of public improvement projects, including but not limited to landscape architectural services, facilities planning services, energy planning services, space planning services, hazardous substances or hazardous waste or toxic substances testing services, cost-estimating services, appraising services, material testing services, mechanical system balancing services, commissioning services, project management services, construction management services, and owner's representation services, or land-use planning services.

(12) "Transportation Planning Services" means Transportation Planning services for projects that require compliance with the National Environmental Policy Act, 42 U.S.C. 4321 et seq. Transportation Planning services include only project-specific transportation planning involved in the preparation of categorical exclusions, environmental assessments, environmental impact statements, and other documents required for compliance with the National Environmental Policy Act, 42 USC 4321 et. seq. Transportation Planning services do not include transportation planning for corridor plans, transportation system plans, interchange area management plans, refinement plans, and other transportation plans not directly associated with an individual project that will require compliance with the National Environmental Policy Act, 42 USC 4321 et. seq. Transportation Planning services also do not include transportation planning for projects not subject to the National Environmental Policy Act, 42 USC 4321 et. seq.

PPS 48-0120 List of Interested Consultants; Performance Record

(1) Consultants who are engaged in the lawful practice of their profession and who are interested in providing Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services may annually submit a statement describing their qualifications and related performance information to the District's office addresses. The District shall use this information to create a list of prospective Consultants and shall update this list at least once every two years.

(2) The District may compile and maintain a record of each Consultant's performance under Contracts with the particular Contracting Agency, including information obtained from Consultants during an exit interview. Upon request and in accordance with the Oregon Public Records Law (ORS 192.311 through 192.478), the District may make available copies of the records.

PPS 48-0130 Applicable Selection Procedures; Pricing Information; Disclosure of Proposals; Conflicts of Interest

(1) Selection of Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors. When selecting the most qualified Consultant to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, the District shall follow the applicable selection procedure under either PPS 48-0200 (Direct Appointment Procedure), PPS 48-0210 (Informal Selection Procedure), or PPS 488-0220 (Formal Selection Procedure). The District may solicit or use pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates and overhead, in any of the District's selection procedures to select Consultants to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, pursuant to the requirements of ORS 279C.110(5)

(2) Selection of Consultants to Perform Related Services. The District shall select a Consultant to perform Related services using one of the following selection procedures:

(a) When selecting a Consultant on the basis of qualifications alone, the District shall follow the applicable selection procedure under either PPS 48-0200 (Direct Appointment Procedure), PPS 48-0210 (Informal Selection Procedure), or PPS 48-0220 (Formal Selection Procedure);

(b) When selecting a Consultant on the basis of price competition alone, the District shall follow the applicable provisions under PPS 48-0200 (Direct Appointment Procedure), the applicable provisions of PPS 48-0210 (Informal Selection Procedure) pertaining to obtaining and evaluating price proposals and other pricing information, or the applicable provisions of PPS 48-0220 (Formal Selection Procedure) pertaining to obtaining and evaluating price Proposals and other pricing information; and

(c) When selecting a Consultant on the basis of price and qualifications, the District shall follow the applicable provisions under PPS 48-0200 (Direct Appointment Procedure), the applicable provisions of PPS 48-0210 (Informal Selection Procedure) pertaining to obtaining and evaluating price and qualifications Proposals, or the applicable provisions of PPS 48-0220 (Formal Selection Procedure) pertaining to obtaining and evaluating price and qualifications proposals. For selections under the informal selection procedure of PPS 48-0210, the District may use abbreviated requests for proposals that nevertheless meet the requirements of PPS 48-0210, when the District determines, in its sole discretion, that the characteristics of the project and the Related services required by the District would be adequately addressed by a more abbreviated Request for proposal document generally comparable to the intermediate procurement procedures and related documentation under ORS 279B.070 and PPS 47-0270. The District may request and consider a Proposer's pricing policies and pricing Proposals or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead, submitted with a proposal.

Sections (1) and (2) Do Not Apply to Price Agreements. The District is not required to follow the procedures in section (1) or section (2) of this rule when the District has established Price Agreements pursuant to PPS 48-0270 with more than one Consultant and is selecting a single Consultant to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under an individual work order or task order. Provided, however, the criteria and procedures the District uses to select a single Consultant, when the District has established Price Agreements with more than one Consultant, shall meet the requirements of OAR PPS 48-0270 (Price Agreements).

(3) Electronic Selection. The District may use electronic methods to screen and select a Consultant in accordance with the procedures described in sections (1) and (2) of this rule. If The District uses electronic methods to screen and select a Consultant, the District shall first promulgate rules for conducting the

screening and selection procedure by electronic means, substantially in conformance with PPS 47-0330 (Electronic procurement).

(4) Contracts for "Mixed" Services. For purposes of these division 48 rules, a "mixed" Contract is one requiring the Consultant to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, and also provide Related services, other services or other related goods under the Contract. The District's classification of a procurement that will involve a "mixed" Contract will be determined by the predominant purpose of the Contract. The District shall determine the predominant purpose of the Contract by determining which of the services involves the majority of the total Estimated Fee to be paid under the Contract. If the majority of the total Estimated Fee to be paid under the Contract is for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, the District shall comply with the requirements of section (1) of this rule. If the majority of the total Estimated Fee to be paid under the Contract is for Related services, the District shall comply with the requirements of section (2) of this rule. If the majority of the total Estimated Fee to be paid under the Contract is for some other services or goods under the Public Contracting Code, the District shall comply with the applicable provisions of PPS divisions 46, 47 and 49 of these rules that match the predominant purpose of the Contract.

(5) Compliance With Board Policy. In applying these rules, the District shall support Board Policies relating to District Contracts.

(6) Disclosure Requirements for Proposals Under Division 48. The following provisions apply to proposals received by the District for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services:

(a) "Competitive Proposals" Means all Proposals Solicited under Division 48. The term "competitive proposal" includes Proposals under PPS 48-0200 (Direct Appointment Procedure), PPS 48-0210 (Informal Selection Procedure), PPS 48-0220 (Formal Selection Procedure) or PPS 48-0130(2)(c) (Selection Based on Price and Qualifications), and any proposals submitted in response to a selection process for a work order or task order under PPS 48-0270 (Price Agreements) or PPS 48-0280 (FSCP).

(b) Direct Appointments. For purposes of Proposals received by the District under PPS 48-0200 (Direct Appointment Procedure), a formal notice of intent to award is not required. As a result, while the District may make Proposals under PPS 48-0200 (Direct Appointment Procedure) open for public inspection following the District's decision to begin Contract negotiations with the selected Consultant, Proposals are not required to be open for public inspection until after the District has executed a Contract with the selected Consultant.

(c) Closely Competitive Proposals. In the limited circumstances permitted by ORS 279C.110, 279C.115, and 279C.120, here the District is conducting discussions or negotiations with Proposers who submit Proposals that the District has determined to be closely competitive or to have a reasonable chance of being selected for award, the District may open Proposals so as to avoid disclosure of proposal contents to competing Proposers, consistent with the requirements of ORS 279C.107. Otherwise, the District may open Proposals in such a way as to avoid disclosure of the contents until after the District executes a Contract with the selected Consultant. If the District determines that it is in the best interest of the District to do so, the District may make Proposals available for public inspection following the District's issuance of a notice of intent to award a Contract to a Consultant; and

(d) ORS 297C.107 Requirements. Disclosure of Proposals and proposal information is otherwise governed by ORS 279C.107 as follows:

(A) The District may open Proposals so as to avoid disclosing contents to competing Proposers during, where applicable, the process of negotiation.

(B) The District need not open Proposals for public inspection until after the District executes a Contract.

(C) Regardless of when Proposals are opened for public inspection, the District shall withhold from disclosure trade secrets as defined in ORS 192.501, and information submitted to the District in confidence as described in ORS 192.502.

(D) Opening a proposal at a public meeting of the Board or other body subject to the Public Meetings Law does not make the contents of the proposal subject to disclosure regardless of whether an executive session has been called.

(E) If a request for Proposals is cancelled after Proposals are received, the District shall, subject to ORS 192.501 and 192.502, return a proposal and all copies of the proposal to the Proposer. The District shall keep a list of returned Proposals in the Solicitation file.

(7) Independent and Objective Oversight Required. Pursuant to ORS 279C.307(1), when procuring Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Contract subject to PPS divisions 48 or 49 ("ORS 279C.307 Services"), the District may not:

(a) Procure the Personal services identified in ORS 279C.307 from a Contractor or Consultant or an affiliate of a Contractor or Consultant who is a party to the Public Contract that is subject to administration, management, monitoring, inspection, evaluation, or oversight by means of the Personal services; or

(b) Procure the Personal services identified in ORS 279C.307 through the Public Contract that is subject to administration, management, monitoring, inspection, evaluation, or oversight by means of Personal services.

(8) Application of Section 8. The requirements of ORS 279C.307(1) and section 8 of this rule apply in the following circumstances, except as provided in section (9) and (10) of this rule:

(a) The District requires the procurement of Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Public Contract or performance under a Public Contract that is subject to ORS chapter 279C. A Public Contract that is "subject to ORS chapter 279C" includes a Public Contract for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, a Public Contract for Related services, or a Public Contract for construction services under ORS chapter 279C.

(b) The procurement of Personal services subject to the restrictions of ORS 279C.307 include, but are not limited to, the following:

(A) Procurements for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services that involve overseeing or monitoring the performance of a construction Contractor under a Public Contract for construction services subject to ORS chapter 279C;

(B) Procurements for commissioning services, which involve monitoring, inspecting, evaluating or otherwise overseeing the performance of a Contractor providing Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or the performance of a construction Contractor under a Public Contract for construction services subject to ORS chapter 279C;

(C) Procurements for project management services, which involve administration, management, monitoring, inspecting, evaluating compliance with, or otherwise overseeing the performance of a Contractor providing Architectural, Engineering, Photogrammetric

Mapping, Transportation Planning or Land Surveying services, construction services subject to ORS chapter 279C, commissioning services, or other Related services for a project;

(D) Procurements for special inspections and testing services, which involve inspecting, testing, or otherwise overseeing the performance of a construction Contractor under a Public Contract for construction services subject to ORS chapter 279C; and

(E) Procurements for other Related services or Personal services, which involve administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing the Public Contracts described in section (10)(a) of this rule.

(9) Design-Build and CM/GC Contract Solicitations. The requirements of ORS 279C.307 do not apply in the following circumstances, except as further specified below:

(a) To the District's procurement of both design services and construction services through a single "Design-Build" procurement, as that term is defined in PPS 49-0610. Such a Design-Build procurement includes a procurement under an Energy Savings Performance Contract, as defined in ORS 279A.010. Provided, however, the restrictions of ORS 279C.307 do apply to the District's procurement of Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Design-Build Contract or performance under such a Contract resulting from a Design-Build procurement; and

(b) To the District's procurement of both pre-construction services and construction services through a single procurement of Construction Manager/General Contractor services, as that term is defined in ORS 279C.332(3). Provided, however, the restrictions of ORS 279C.307 do apply to the District's procurement of Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Construction Manager/General Contractor services Contract or performance under such a Contract resulting from a procurement of Construction Manager/General Contractor services.

(10) Application for Exception. As permitted by ORS 279C.307(3), the District may apply for an exception to the requirements of ORS 279C.307(1) in the situation when the District anticipates that it must procure Personal Services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with or otherwise overseeing a Public Contract or performance under a Public Contract that is subject to ORS chapter 279C, and the District desires to accept a Bid or other Proposal from a Contractor or Consultant that would otherwise be prohibited from bidding or proposing to provide the required Personal Services. In order for the District to obtain such an exception to the requirements of ORS 279C.307(1), the District must apply for and obtain an approved exception from the Appropriate Authority for the District before awarding a contract to the Contractor or Consultant under a Procurement for the required Personal Services, or before entering into an amendment of an existing Public Contract with the Contractor or Consultant to obtain the Personal Services.

(a) Application Requirements. The District's application to the Appropriate Authority for an exception under ORS 279C.307(3) must include the following Findings and Justifications:

(A) The District requires Personal Services described in ORS 279C.307(1);

(B) Accepting a Bid or from a Contractor or Consultant that would be subject to the prohibition described in ORS 279C.307(1) is in the best interest of the District;

(C) Approving the is unlikely to encourage favoritism in awarding Public Contracts or to substantially diminish competition for Public Contracts; and

(D) Approving the exception:

(i) Is reasonably expected to result in substantial cost savings to the District or the public; or

(ii) Otherwise will substantially promote the public interest in a manner that could not be practicably realized by complying with the prohibition described in ORS 279C.307(1).

(b) Consultation with Legal Counsel. The District shall consult with the District's legal counsel during the exception process provided for in ORS 279C.307(3) as follows:

(A) During the process of preparing an application for the exception to ensure compliance with the requirements of ORS 279C.307 and with the other applicable provisions of ORS chapter 279C;

(B) Pursuant to the requirements of an ORS 279C.307(3) exception approved by the District's Appropriate Authority; and

(C) The District's consultation with its legal counsel should include discussion and evaluation of mitigation measures that the District can include in the Procurement and in any resulting Public Contract for the Personal Services, in order to reduce any competitive advantage that the Contractor or Consultant may have or may be perceived to have, and to increase the objectivity and independence of the Contractor or Consultant during its performance of the Personal Services.

(c) Definitions. The following definitions apply to section (11) of this rule:

(i) "Appropriate Authority" means the District's local contract review board; and

(ii) "Findings and Justifications" means the determinations, findings and justifications for a conclusion that the District, in seeking an exception from the objectivity and independence requirements of ORS 279C.307(1), reaches based on the considerations set forth in ORS 279C.307(3)(d) and based on sufficient supporting facts.

SELECTION PROCEDURES

PPS 48-0200 Direct Appointment Procedure

(1) The District may enter into a Contract directly with a Consultant without following the selection procedures set forth elsewhere in these rules if:

(a) Emergency. The District finds that an Emergency exists; or

(b) Small Estimated Fee. The Estimated Fee to be paid under the Contract does not exceed $100,000; or

(c) FSCP. The Consultant is a member of an FSCP that has been established for the class of work for which a Contract is required; or

(d) Continuation of Project with an Intermediate Estimated Fee. Where a District project is being continued, as more particularly described below, and where the Estimated Fee will not exceed $250,000, the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be performed under the following requirements:

(A) The services consist of or are related to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that have been substantially described, planned, or otherwise previously studied in an earlier Contract with the same Consultant and are rendered for the same project as the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services rendered under the earlier Contract;

(B) The Estimated Fee to be made under the Contract does not exceed $250,000; and

(C) The District used either the formal selection procedure under PPS 48-0220 (Formal Selection Procedure) or the formal selection procedure applicable to selection of the Consultant at the time of original selection to select the Consultant for the earlier Contract; or

(e) Continuation of Project With an Extensive Estimated Fee. When a District project is being continued, as more particularly described below, and where the Estimated Fee is expected to exceed $250,000, the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be performed under the Contract shall meet the following requirements:

(A) The services consist of or are related to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that have been substantially described, planned, or otherwise previously studied under an earlier Contract with the same Consultant and are rendered for the same project as the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services rendered under the earlier Contract;

(B) The District used either the formal selection procedure under PPS 48-0220 (Formal Selection Procedure) or the formal selection procedure applicable to selection of the Consultant at the time of original selection to select the Consultant for the earlier Contract; and

(C) The District makes written findings that entering into a Contract with the Consultant, whether in the form of an amendment to an existing Contract or a separate Contract for the additional scope of services, will:

(iii) Promote efficient use of public funds and resources and result in substantial cost savings to the District; and

(iv) Protect the integrity of the Public Contracting process and the competitive nature of the procurement by not encouraging favoritism or substantially diminishing competition in the award of the Contract; or

(f) The Contract Review Board Grants Approval for a Direct Appointment or Alternative Procurement Process.

(A) The Superintendent may seek approval from the Local Contract Review Board for direct appointment or an alternative procurement process for Consultant services.

(B) The Superintendent shall submit a written request to the Board demonstrating that:

(i) Approval by the Board is unlikely to encourage favoritism in the award of public contracts or substantially diminish competition for public contracts; and

(ii) Is reasonably expected to result in substantial cost savings to the District or to the public; or

(iii) Otherwise substantially promotes the public interest in a manner that could not practicably be realized by complying with the selection procedures otherwise required by these rules.

(2) The District may select a Consultant for a Contract under this rule from the following sources:

(a) District's list of Consultants that is created under PPS 48-0120 (List of Interested Consultants; Performance Record);

(b) Another Contracting Agency's list of Consultants that the Contracting Agency has created under PPS 48-0120 0120 (List of Interested Consultants; Performance Record), with written consent of that Contracting Agency; or

(c) All Consultants offering the required Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that the District reasonably can identify under the circumstances.

(3) The District shall direct negotiations with a Consultant selected under this rule toward discussing, refining, and finalizing the following:

(a) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant

(b) The Consultant's performance obligations and performance schedule;

(c) Payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services; and

(d) Any other provisions that the District believes to be in the District's best interest to negotiate.

PPS 48-0210 Informal Selection Procedure

(1) The District may use the informal selection procedure described in this rule to obtain a Contract if the Estimated Fee is expected not to exceed $250,000.

(2) When using the informal selection procedure on the basis of qualifications alone or, for Related services, on the basis of price and qualifications, the District shall:

(a) Create a request for Proposals ("RFP") that includes at a minimum the following:

(A) A description of the project for which a Consultant's Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services are needed and a description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that will be required under the resulting Contract;

(B) The anticipated Contract performance schedule;

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including construction services;

(D) The date and time Proposals are due and other directions for submitting Proposals;

(E) Criteria upon which the most qualified Consultant will be selected. Selection criteria may include, but are not limited to, the following:

(i) The amount and type of resources and number of experienced staff the Consultant has committed to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP within the applicable time limits, including the current and projected workloads of such staff and the proportion of time such staff would have available for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services;

(ii) Proposed management techniques for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(iii) A Consultant's capability, experience and past performance history and record in providing similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, including but not limited to quality of work, ability to meet schedules, cost control methods and Contract administration practices;

(iv) A Consultant's approach to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP and design philosophy, if applicable;

(v) A Consultant's geographic proximity to and familiarity with the physical location of the project;

(vi) Volume of work, if any, previously awarded to a Consultant, with the objective of effecting equitable distribution of Contracts among qualified Consultants, provided such distribution does not violate the principle of selecting the most qualified Consultant for the type of professional services required;

(vii) A Consultant's ownership status and employment practices regarding women, minorities and emerging small businesses or historically underutilized businesses;

(viii) Whether the Consultant owes a liquidated and delinquent debt to the State of Oregon; and

(ix) If the District is selecting a Consultant to provide Related service, pricing policies and pricing proposals or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates and overhead.

(F) A Statement that Proposers responding to the RFP do so solely at their expense, and District is not responsible for any Proposer expenses associated with the RFP;

(G) A statement directing Proposers to the protest procedures set forth in these division 48 rules; and

(H) A sample form of the Contract.

(b) Provide an RFP to a minimum of five (5) prospective Consultants. If fewer than five (5) prospective Consultants are available, Contracting Agencies shall provide the RFP to all available prospective Consultants and shall maintain a written record of the Contracting Agencies' efforts to locate available prospective Consultants for the RFP. Contracting Agencies shall draw prospective Consultants from:

(A) The District's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record);

(B) Another Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record); or

(C) All Consultants that the District reasonably can locate that offer the desired Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, or any combination of the foregoing.

(c) Review and rank all Proposals received according to the criteria set forth in the RFP, and select the three highest ranked Proposers.

(3) Contracting Agencies using the informal selection procedure for Related services on the basis of price Proposals and other pricing information alone shall:

(a) Create an RFP that includes at a minimum the following:

(A) A description of the project for which a Consultant's Related services are needed and a description of the Related services that will be required under the resulting Contract;

(B) The anticipated Contract performance schedule;

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including construction services;

(D) The date and time Proposals are due and other directions for submitting Proposals;

(E) Any minimum or pass-fail qualifications that the Proposers shall meet, including but not limited to any such qualifications in the subject matter areas described in section (2)(a)(E)(i) through section (2)(a)(E)(viii) of this rule that are related to the Related services described in the RFP;

(F) Pricing criteria upon which the highest ranked Consultant will be selected. Pricing criteria may include, but are not limited to, the total price for the Related services described in the RFP, Consultant pricing policies and other pricing information such as the Consultant's estimated number of staff hours needed to perform the Related services described in the RFP, expenses, hourly rates and overhead;

(G) A statement directing Proposers to the protest procedures set forth in these division 48 rules; and

(H) A sample form of the Contract.

(b) Provide the RFP to a minimum of five (5) prospective Consultants. If fewer than five (5) prospective Consultants are available, Contracting Agencies shall provide the RFP to all available prospective Consultants and shall maintain a written record of the Contracting Agencies' efforts to locate available prospective Consultants for the RFP. Contracting Agencies shall draw prospective Consultants from:

(A) The District's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record);

(B) Another Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record); or

(C) All Consultants that the District reasonably can locate that offer the desired Related services; and.

(c) Review and rank all responsive Proposals received, according to the total price for the Related services described in the RFP, Consultant pricing policies and other pricing information requested in the RFP, including but not limited to the number of hours proposed for the Related services required, expenses, hourly rates and overhead, and select the three highest ranked Proposers.

(4) If the District does not cancel the RFP after it reviews the Proposals and ranks each Proposer, the District will begin negotiating a Contract with the highest ranked Proposer. The District shall direct Contract negotiations toward discussing, refining and finalizing the following:

(a) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(b) The Consultant's performance obligations and performance schedule;

(c) Payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services; and

(d) Any other conditions or provisions that the District believes to be in the District's best interest to negotiate.

(5) The District shall, either orally or in writing, formally terminate negotiations with the highest ranked Proposer, if the District and the Proposer are unable for any reason to reach agreement on a Contract within a reasonable amount of time. The District may thereafter negotiate with the second ranked Proposer, and if necessary, with the third ranked Proposer, in accordance with section (4) of this rule, until negotiations result in a Contract. If negotiations with any of the top three Proposers do not result in a Contract within a reasonable amount of time, the District may end the particular informal solicitation and thereafter may proceed with a new informal solicitation under this rule or proceed with a formal solicitation under OAR 137-048-0220 (Formal Selection Procedure).

(6) If the District uses the informal selection procedure for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, when the District will be using pricing policies, proposals or other pricing information as part of the District' screening and selection of prospective Consultants, pursuant to ORS 279C.110(5) [HB 2769 (Oregon Laws 2019, Chapter 55)], shall:

(a) Create an RFP that meets the requirements of ORS 279C.110(5)(a) In providing an estimate of the cost of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, the District may provide a specific estimate of that cost, or a range of estimated costs;

(b) Provide the RFP to a minimum of five (5) prospective Consultants. If fewer than five (5) prospective Consultants are available, the District shall provide the RFP to all available prospective Consultants and shall maintain a written record of the District's efforts to locate available prospective Consultants for the RFP. The District shall draw prospective Consultants from:

(A) The District's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record);

(B) Another Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record); or

(C) All Consultants that the District reasonably can locate that offer the desired Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, or any combination of the foregoing.

(c) In the initial phase of the RFP, evaluate each prospective Consultant on the basis of each Consultant's qualifications to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, with those qualifications including the criteria set forth in subsections (2)(a)(E)(i) through (2)(a)(E)(viii) of this rule;

(d) At the end of the initial phase of the RFP, announce the evaluation scores of each Consultant and rank each Consultant according to the evaluation scores. The District shall identify up to three (3) of the highest ranked prospective Consultants as being qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, and as being eligible to participate in the second phase of the RFP process;

(e) In the second phase of the RFP, request a pricing proposal from the highest ranked prospective Consultants identified in the initial phase of the RFP, with that pricing proposal to meet the requirements of ORS 279C.110(5)(c)(A) and (B);

(f) Complete the evaluation of the highest ranked prospective Consultants that have decided to provide price proposals. In the District's final evaluation of the prospective Consultants who have provided price proposals, the District cannot assign more than fifteen (15) percent of the overall weight of the evaluation criteria in the second phase of the RFP to each Consultant's price proposal;

(g) If the District does not cancel the RFP after it reviews the qualifications of all prospective Consultants and the price proposals received from the highest ranked Consultants and ranks the highest ranked Consultants from the second phase of the RFP, begin negotiating a Contract with the highest ranked prospective Consultant. The District shall direct Contract negotiations toward discussing, refining and finalizing the following:

(A) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(B) The Consultant's performance obligations and performance schedule;

(C) The Consultant's payment methodology, rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services; and

(D) Any other conditions or provisions the District believes to be in the District's best interest to negotiate; and

(h) The District shall, either orally or in writing, formally terminate negotiations with the highest ranked Consultant, if the District and the Consultant are unable for any reason to reach agreement on a Contract within a reasonable amount of time. The District may thereafter negotiate with the second ranked Consultant, and if necessary, with the third ranked Consultant, in accordance with section (6)(g) of this rule, until negotiations result in a Contract. If negotiations with any of the top three prospective Consultants do not result in a Contract within a reasonable amount of time, the District may end the particular informal solicitation and thereafter may proceed with a new informal solicitation under this rule or proceed with a formal solicitation under OAR 137-048-0220 (Formal Selection Procedure).

(7) When the Estimated Fee in an informal selection procedure under this rule is expected not to exceed $150,000, the Contracting Agency is only required to provide the RFP under sections (2), (3) and (6) of this rule to three (3) prospective Consultants. If fewer than three (3) prospective Consultants are available, the Contracting Agency shall provide the RFP to all available prospective Consultants and shall maintain a written record of the Contracting Agency's efforts to locate available prospective Consultants for the RFP.

(8) The Contracting Agency shall terminate the informal selection procedure and proceed with the formal selection procedure under PPS 48-0220 if the scope of the anticipated Contract is revised during negotiations so that the Estimated Fee will exceed $250,000.

PPS 48-0220 Formal Selection Procedure

(1) Subject to OAR PPS 48-0130 (Applicable Selection Procedures; Pricing Information; Disclosure of Proposals), the District shall use the formal selection procedure described in this rule to select a Consultant if the Consultant cannot be selected under either PPS 48-0200 (Direct Appointment Procedure) or under PPS

48-0210 (Informal Selection Procedure). The formal selection procedure described in this rule may otherwise be used at the District's discretion.

(2) When using the formal selection procedure, the District shall obtain Contracts through public advertisement of RFPs, or Requests for Qualifications followed by RFPs.

(a) Except as provided in subsection (2)(b) of this section, the District shall advertise each RFP and RFQ at least once in at least one newspaper of general circulation in the area where the project is located, and in as many other issues and publications as may be necessary or desirable to achieve adequate competition. Other issues and publications may include, but are not limited to, local newspapers, trade journals, and publications targeted to reach disadvantaged business enterprise (DBE), veteran-owned business (VB), minority business enterprise (MBE), women business enterprise (WBE), and emerging small business enterprise (ESB) audiences.

(A) The District shall publish the advertisement within a reasonable time before the deadline for the proposal submission or response to the RFQ or RFP, but in any event no fewer than fourteen (14) calendar days before the closing date set forth in the RFQ or RFP.

(B) The District shall include a brief description of the following items in the advertisement:

(i) The project;

(ii) A description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services the District seeks;

(iii) How and where Consultants may obtain a copy of the RFQ or RFP; and

(iv) The deadline for submitting a proposal or response to the RFQ or RFP.

(b) In the alternative to advertising in a newspaper as described in subsection (2)(a) of this rule, the District shall publish each RFP and RFQ by one or more of the electronic methods identified in PPS 46-0110(14). The District shall comply with Sections (2)(a)(A) and (2)(a)(B) of this rule when publishing advertisements by electronic methods.

(c) The District may send notice of the RFP or RFQ directly to all Consultants on the District's list of Consultants that is created and maintained under PPS 48-0120 (List of Interested Consultants; Performance Record).

(3) Request for Qualifications Procedure. The District may use the RFQ procedure to evaluate potential Consultants and establish a short list of qualified Consultants to whom the District may issue an RFP for some or all of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ.

(a) Mandatory RFQ Requirements. The District shall include the following, at a minimum, in each RFQ:

(A) A brief description of the project for which the District is seeking a Consultant;

(B) A description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services the District seeks for the project;

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including, but not limited to, construction services;

(D) The deadline for submitting a response to the RFQ;

(E) A description of required Consultant qualifications for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that the District seeks;

(F) The RFQ evaluation criteria, including weights, points, or other classifications applicable to each criterion;

(G) A statement whether or not the District shall hold a pre-qualification meeting for all interested Consultants to discuss the project and the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ, and if a pre-qualification meeting will be held, the location of the meeting and whether or not attendance is mandatory; and

(H) A Statement that Consultants responding to the RFQ do so solely at their expense, and that the District is not responsible for any Consultant expenses associated with the RFQ.

(b) Optional RFQ Requirements. The District may include a request for any or all of the following in each RFQ:

(A) A statement describing Consultants' general qualifications and related performance information;

(B) A description of Consultants' specific qualifications to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ, including Consultants committed resources and recent, current, and projected workloads;

(C) A list of similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services and references concerning past performance, including but not limited to price and cost data from previous projects, quality of work, ability to meet schedules, cost control, and contract administration;

(D) A copy of all records, if any, of Consultants' performance under Contracts with any other Contracting Agency;

(E) The number of Consultants' experienced staff committed to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ, including such personnel's specific qualifications and experience and an estimate of the proportion of time that such personnel would spend on those services;

(F) Consultants' approaches to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ and design philosophy, if applicable;

(G) Consultants' geographic proximity to and familiarity with the physical location of the project;

(H) Consultants' Ownership status and employment practices regarding women, minorities and emerging small businesses or historically underutilized businesses;

(I) If the District is selecting a Consultant to provide Related services, Consultants' pricing policies and pricing Proposals, or other pricing information, including the number of hours estimated for the services required, expenses, hourly rates, and overhead;

(J) Consultants' ability to assist the District in complying with any art acquisition requirements imposed by the District;

(K) Consultants' ability to assist the District in complying with State of Oregon energy efficient design requirements established by the District;

(L) Consultants' ability to assist the District in complying with the solar energy technology requirements pursuant to ORS 276.900 through 279.915; and

(M) Any other information the District deems reasonably necessary to evaluate Consultants' qualifications.

(c) Pricing Proposal Requests Not Allowed During the RFQ Process When RFQ Is Followed by RFP. If the District will use a Request for Qualifications followed by an RFP to procure Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services under this rule and District intends to use pricing policies, proposals or other pricing information as part of the District's screening and selection of prospective Consultants, pursuant to ORS 279C.110(5), the District cannot request cost proposals or otherwise use pricing policies, proposals or other pricing information as part of the Request for Qualifications. The District may only request cost proposals or otherwise use pricing policies, proposals or other pricing information during the RFP process, following the establishment of a short list of qualified Consultants through the Request for Qualifications process.

(d) RFQ Evaluation Committee. The District shall establish an RFQ evaluation committee of at least two individuals to review, score, and rank the responding Consultants according to the evaluation criteria. The District may appoint to the evaluation committee District employees or employees of other public agencies with experience in Architecture, Engineering, or Land Surveying services, Related services, construction services, or Public Contracting. If the District procedure permits, the District may include on the evaluation committee private practitioners of architecture, engineering, photogrammetry, transportation planning, land surveying, or related professions. The District shall designate one member of the evaluation committee as the evaluation committee chairperson.

(e) The District may use any reasonable screening or evaluation method to establish a short list of qualified Consultants, including, but not limited to, the following:

(A) Requiring Consultants responding to an RFQ to achieve a threshold score before qualifying for placement on the short list;

(B) Placing a pre-determined number of the highest scoring Consultants on a short list;

(C) Placing on a short list only those Consultants with certain essential qualifications or experience, whose practice is limited to a particular subject area, or who practice in a particular geographic locale or region, provided that such factors are material, would not unduly restrict competition, and were announced as dispositive in the RFQ.

(f) After the evaluation committee reviews, scores, and ranks the responding Consultants, the District shall establish a short list of at least three qualified Consultants, if feasible, provided however, if four or fewer Consultants responded to the RFQ or if fewer than three Consultants fail to meet the District's minimum requirements, then:

(A) The District may establish a short list of fewer than three qualified Consultants; or

(B) The District may cancel the RFQ and issue an RFP.

(g) No Consultant will be eligible for placement on the District's short list established under subsection (3)(d) of this rule if the Consultant or any of Consultant's principals, partners, or associates are members of the District's RFQ evaluation committee.

(h) Except when the RFQ is cancelled, the District shall provide a copy of the subsequent RFP to each Consultant on the short list.

(4) Formal Selection of Consultants Through Request for Proposal. The District shall use the procedure described in section (4) of this rule when issuing an RFP for a Contract described in section (1) of this rule.

(a) Required Contents. Except as otherwise provided in Sections (4)(b) and (4)(c) of this rule, when the District uses the formal selection procedure, the District shall include at least the following in each RFP, whether or not the RFP is preceded by an RFQ:

(A) General background information, including a description of the project and the specific Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services sought for the project, the estimated project cost, the estimated time period during which the project is to be completed, and the estimated time period in which the specific Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services sought will be performed.

(B) The RFP evaluation process and the criteria which will be used to select the most qualified Proposer, including the weights, points, or other classifications applicable to each criterion. If the District does not indicate the applicable number of points, weights, or other classifications, then each criterion is of equal value. Evaluation criteria may include, but are not limited to, the following:

(i) Proposers' availability and capability to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(ii) Experience of Proposers' key staff persons in providing similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services on comparable projects;

(iii) The amount and type of resources and number of experienced staff persons Proposers have committed to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(iv) The recent, current, and projected workloads of the staff and resources referenced in section (4)(a)(B)(iii), above;

(v) The proportion of time Proposers estimate that the staff referenced in section (4)(a)(B)(iii) above would spend on the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(vi) Proposers' demonstrated ability to complete successfully similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services on time and within budget, including whether or not there is a record of satisfactory performance under PPS 48-0120 (List of Interest Consultants; Performance Record);

(vii) References and recommendations from past clients;

(viii) Proposers' performance history in meeting deadlines, submitting accurate estimates, producing high quality work, meeting financial obligations, price and cost data from previous projects, cost controls, and contract administration;

(ix) Status and quality of any required license or certification;

(x) Proposers' knowledge and understanding of the project and Architectural, Engineering, and Land Surveying services or Related services described in the RFP as shown in Proposers' approaches to staffing and scheduling needs for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, and proposed solutions to any perceived design and constructability issues;

(xi) Results from interviews, if conducted;

(xii) Design philosophy, if applicable, and approach to the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(xiii) If the District is selecting a Consultant to provide Related services, pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead; and

(xiv) Any other criteria that the District deems relevant to the project and the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP, including, where the nature and budget of the project so warrant, a design competition between competing Proposers. Provided, however, these additional criteria cannot include pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead, when the sole purpose or predominant purpose of the RFP is to obtain Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services.

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including, but not limited to, construction services;

(D) Whether interviews are possible and if so, the weight, points, or other classifications applicable to the potential interview;

(E) The date and time Proposals are due, and the delivery location for Proposals;

(F) Reservation of the right to seek clarifications of each proposal;

(G) Reservation of the right to negotiate a final Contract that is in the best interest of the District;

(H) Reservation of the right to reject any or all Proposals and reservation of the right to cancel the RFP at any time if doing either would be in the public interest as determined by the District;

(I) A Statement that Proposers responding to the RFP do so solely at their expense, and the District is not responsible for any Proposer expenses associated with the RFP;

(J) A statement directing Proposers to the protest procedures set forth in these division 48 rules;

(K) Special Contract requirements, including but not limited to DBE, MBE, WBE, ESB, and VB participation goals or good faith efforts with respect to DBE, MBE, WBE, ESB, and VB participation, and federal requirements when federal funds are involved;

(A) A statement whether or not the District shall hold a pre-proposal meeting for all interested Consultants to discuss the project and the Architectural, Engineering, Photogrammetric

Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP, and if a pre-proposal meeting will be held, the location of the meeting and whether or not attendance is mandatory;

(B) A request for any information the District deems reasonably necessary to permit the District to evaluate, rank, and select the most qualified Proposer to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP; and

(C) A sample form of the Contract.

(b) RFP Contents for Related Services Selections Based on Price Only. When using the formal selection procedure, the District shall include at least the following in each RFP, whether or not the RFP is preceded by an RFQ, when the formal selection procedure is for Related services selected on the basis of price Proposals and other pricing information only:

(A) General background information, including a description of the project and the specific Related services sought for the project, the estimated project cost, the estimated time period during which the project is to be completed, and the estimated time period in which the specific Related services sought will be performed;

(B) The RFP evaluation process and the price criteria which will be used to select the highest ranked Proposer, including the weights, points or other classifications applicable to each criterion. If the District does not indicate the applicable number of points, weights or other classifications, then each criterion is of equal value. Evaluation price criteria may include, but are not limited to, the total price for the Related services described in the RFP, Consultant pricing policies, and other pricing information such as the Consultant's estimated number of staff hours needed to perform the Related services described in the RFP, expenses, hourly rates and overhead;

(C) Any minimum or pass-fail qualifications that the Proposers shall meet, including but not limited to any such qualifications in the subject matter areas described in section (4)(a)(B)(i) through section (4)(a)(B)(xii) of this rule; and

(D) The information listed in section (4)(a)(C) through section(4)(a)(N) of this rule pertaining to the Related services described in the RFP.

(c) RFP Contents for District Selection of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services with Pricing Policies, Proposals or Other Pricing Information. If the District will be including pricing policies, proposals or other pricing information in the District's formal selection procedure criteria for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services pursuant to ORS 279C.110(5), the District shall meet the following minimum requirements for each RFP:

(A) If the District has used the Request for Qualifications procedure in section (3) of this rule to evaluate potential Consultants and establish a short list of qualified Consultants pursuant to ORS 279C.110(5), the RFP shall meet the requirements of ORS 279C.110(5) that address the second phase of the selection process applicable to the short list of no more than three of the highest ranked prospective consultants that were identified in the initial phase of the selection process described in ORS 279C.110(5)(a) and (b).

(B) If the District has elected to not use the Request for Qualifications procedure in section (3) of this rule, and will use only an RFP in the District's use of the formal selection procedure, the District shall include at least the following in the RFP:

(i) The information set forth in ORS 279C.110(5)(a). In providing an estimate of the cost of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, the District may provide a specific estimate of that cost, or a range of estimated costs;

(ii) (In the initial phase of the RFP, provisions describing the District's evaluation of each prospective Consultant on the basis of each Consultant's qualifications to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, with those qualifications including the criteria set forth in subsections (4)(a)(B)(i) through (4)(a)(B)(xiii) and (4)(a)(B)(xv) of this rule;

(iii) At the end of the initial phase of the RFP, provisions describing the District's evaluation scores of each Consultant and rank of each Consultant according to the evaluation scores. The District shall identify up to three (3) of the highest ranked prospective Consultants as being qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, and as being eligible to participate in the second phase of the RFP process;

(iv) In the second phase of the RFP, provisions describing the District's request of a pricing proposal from each of the highest ranked prospective Consultants identified in the initial phase of the RFP, pursuant to the requirements of ORS 279C.110(5)(c)(A) and (B);

(v) Provisions describing the District's evaluation of the highest ranked prospective Consultants that have decided to provide price proposals. In the District's final evaluation of the prospective Consultants who have provided price proposals, the District cannot assign more than fifteen (15) percent of the overall weight of the evaluation criteria in the second phase of the RFP to each Consultant's price proposal;

(d) RFP Evaluation Committee. The District shall establish a committee of at least three individuals to review, score, and rank Proposals according to the evaluation criteria set forth in the RFP. If the RFP has followed an RFQ, the District may include the same members who served on the RFQ evaluation committee. The District may appoint to the evaluation committee the District employees or employees of other public agencies with experience in Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying or Related services, construction services, or Public Contracting. At least one member of the evaluation committee shall be a District employee. If the District procedure permits, the District may include on the evaluation committee private practitioners of architecture, engineering, land surveying, or related professions. The District shall designate one of its employees who also is a member of the evaluation committee as the evaluation committee chairperson.

(A) No Proposer will be eligible for award of the Contract under the RFP if Proposer or any of Proposer's principals, partners, or associates are members of the District's RFP evaluation committee for the Contract;

(B) If the RFP provides for the possibility of Proposer interviews, the evaluation committee may elect to interview Proposers if the evaluation committee considers it necessary or desirable. If the evaluation committee conducts interviews, it shall award weights, points, or other classifications indicated in the RFP for the anticipated interview; and

(C) The evaluation committee shall provide to the District the results of the scoring and ranking for each Proposer.

(e) If the District does not cancel the RFP after it receives the results of the scoring and ranking for each Proposer, the District shall begin negotiating a Contract with the highest ranked Proposer. The District shall direct Contract negotiations toward discussing, refining and finalizing the following:

(A) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(B) The Consultant's performance obligations and performance schedule;

(C) Payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services; and

(D) Any other conditions or provisions the District believes to be in the District's best interest to negotiate.

(f) The District shall, either orally or in writing, formally terminate negotiations with the highest ranked Proposer if the District and Proposer are unable for any reason to reach agreement on a Contract within a reasonable amount of time. The District may thereafter negotiate with the second ranked Proposer, and if necessary, with the third ranked Proposer, and so on if applicable, in accordance with section (4)(c) of this rule, until negotiations result in a Contract. If negotiations with any Proposer do not result in a Contract within a reasonable amount of time, the District may end the particular formal solicitation. Nothing in this rule precludes the District from proceeding with a new formal solicitation for the same Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP that failed to result in a Contract.

PPS 48-0230 Ties Among Proposers

(1) If the District is selecting a Consultant on the basis of qualifications alone and determines after the ranking of Proposers that two or more Proposers are equally qualified, the District may select a candidate through any process that the District believes will result in the best value for the District, taking into account the scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services. Provided, however, that the tie-breaking process established by the District under this section (1) cannot be based on pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead. The process shall be designed to instill public confidence through ethical and fair dealing, honesty, and good faith on the part of the District and Proposers and shall protect the integrity of the Public Contracting process. Once a tie is broken, the District and the selected Proposer shall proceed with negotiations under PPS 48-0210(3) or 48-0220(4)(c), as applicable.

(2) If the District is selecting a Consultant on the basis of price alone, or on the basis of price and qualifications, and determines after the ranking of Proposers that two or more Proposers are identical in terms of price or are identical in terms of price and qualifications, then the District shall follow the procedure set forth in PPS 46-0300 (Preferences for Oregon goods and services) to select the Consultant.

PPS 48-0240 Protest Procedures

(1) RFP Protest and Request for Change. Pursuant to ORS 279C.110(8), Consultants may submit a written protest of anything contained in an RFP and may request a change to any provision, specification, or Contract term contained in an RFP, no later than seven (7) calendar days prior to the date Proposals are due,

unless a different deadline is indicated in the RFP. Each protest and request for change shall include the reasons for the protest or request, and any proposed changes to the RFP provisions, specifications, or Contract terms. The District may not consider any protest or request for change that is submitted after the submission deadline.

(2) Protest of Consultant Selection. Pursuant to ORS 279C.110(8), Consultants may submit a written protest of the District's selection of a Consultant for award of a Contract as follows:

(a) Single Award. In the event of an award to a single Proposer, the District shall provide to all Proposers a copy of the selection notice that the District sent to the highest ranked Proposer. A Proposer who claims to have been adversely affected or aggrieved by the selection of the highest ranked Proposer may submit a written protest of the selection to the District no later than seven days after the date of the selection notice, unless a different deadline is indicated in the RFP. A Proposer submitting a protest shall claim that the protesting Proposer is the highest ranked Proposer because the Proposals of all higher ranked Proposers failed to meet the requirements of the RFP, or because the higher ranked Proposers otherwise are not qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP.

(b) Multiple Award. In the event of an award to more than one Proposer, the District shall provide to all Proposers copies of the selection notices that the District sent to the highest ranked Proposers. A Proposer who claims to have been adversely affected or aggrieved by the selection of the highest ranked Proposers may submit a written protest of the selection to the District no later than seven days after the date of the selection notices, unless a different deadline is indicated in the RFP. A Proposer submitting a protest shall claim that the protesting Proposer is one of the highest ranked Proposers because the Proposals of all higher ranked Proposers failed to meet the requirements of the RFP, or because a sufficient number of Proposals of higher ranked Proposers to failed to meet the requirements of the RFP. In the alternative, a Proposer submitting a protest shall claim that the Proposals of all higher ranked Proposers, or a sufficient number of higher ranked Proposers, are not qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP.

(c) Effect of Protest Submission Deadline. The District may not consider any protest that is submitted after the submission deadline.

(3) Resolution of Protests. A duly authorized representative of the District shall resolve all timely submitted protests within a reasonable time following the District's receipt of the protest, and once resolved, shall promptly issue a written decision on the protest to the Proposer who submitted the protest. If the protest results in a change to the RFP, the District shall revise the RFP accordingly and shall re-advertise the RFP in accordance with these rules.

PPS 48-0250 Solicitation Cancellation, Delay, or Suspension; Rejection of All Proposals or Responses; Consultant Responsibility for Costs

The District may cancel, delay, or suspend a solicitation, RFQ, or other preliminary procurement document, whether related to a Direct Appointment Procedure (PPS 48-0200), Informal Selection Procedure (PPS 48-0210), or a Formal Selection Procedure (PPS 48-0200), or reject all Proposals, responses to RFQs, responses to other preliminary procurement documents, or any combination of the foregoing, if the District believes it is in the public interest to do so. In the event of any such cancellation, delay, suspension, or rejection, the District is not liable to any Proposer for any loss or expense caused by or resulting from any such cancellation, delay, suspension, or rejection. Consultants responding to either solicitations, RFQs, or other preliminary procurement documents are responsible for all costs they may incur in connection with submitting Proposals, responses to RFQs, or responses to other preliminary procurement documents.

PPS 48-0260 Two-Tiered Selection Procedure for District Public Improvement Projects

(1) If the District requires an Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for a public improvement that is owned and maintained by the District and a State Agency will serve as the lead, the District shall enter into Contracts with Architects, Photogrammetrists, Transportation Planners, Engineers, or Land Surveyors for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for that public improvement, and the State Contracting Agency shall utilize the two-tiered selection process described below to obtain these Contracts with Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors.

(2) **Tier One**. State that the District shall, when feasible, identify no fewer than the three (3) most qualified Proposers responding to an RFP that was issued under the applicable selection procedures described in PPS 48-0210 (Informal Selection Procedures) and 48-0220 (Formal Selection Procedures), or from among Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors identified under PPS 48-0200 (Direct Appointment Procedure), and shall notify the District of the Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors selected.

(3) **Tier Two**. In accordance with the qualifications-based selection requirements of ORS 279C.110, the District shall either:

- **(a)** Select an Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor from the State Contracting Agency's list of Proposers to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for the District's public improvement; or
- **(b)** Select an Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for the District's Public Improvement through an alternative process adopted by the District consistent with the provisions of the applicable RFP, if any, and these division 48 rules. The District's alternative process shall be described in the applicable RFP, may be structured to take into account the unique circumstances of the District, and may include provisions to allow the District to perform its tier-two responsibilities efficiently and economically, alone or in cooperation with other Local Contracting Agencies. The District's alternative process may include, but is not limited to, one or more of the following methods:
  - **(A)** A general written direction from the District to the State Contracting Agency, prior to the advertisement of a procurement or series of procurements, or during the course of the procurement or series of procurements, that the District's tier two selection shall be the highest ranked firm identified by the State Contracting Agency during the tier one process, and that no further coordination or consultation with the District is required. However, the District may provide written notice to the State Contracting Agency that the District's general written direction is not to be applied for a particular procurement and describe the process that the District shall utilize for the particular procurement. In order for a written direction from the District consistent with this section to be effective for a particular procurement, it shall be received by the Contracting Agency with adequate time for the State Contracting Agency to revise the RFP in order for Proposers to be notified of the tier two process to be utilized in the procurement. In the event of a multiple award under the terms of the applicable procurement, the written direction from the District may apply to the highest ranked Proposers that are selected under the terms of the procurement document.

(B) An intergovernmental agreement between the District and the Contracting Agency outlining the alternative process that the District has adopted for a procurement or series of procurements.

(C) Where multiple Local Government Contracting Agencies are involved in a two-tiered selection procedure, the Local Government Contracting Agencies may name one or more authorized representative(s) to act on behalf of all the Local Government Contracting Agencies, whether the Local Government Contracting Agencies are acting collectively or individually, to select the Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under the tier two selection process. In the event of a multiple award under the terms of the applicable procurement, the authorized representative(s) of the Local Contracting Agencies may act on behalf of the District to select the highest ranked firms that are required under the terms of the procurement document, as part of the tier two selection process.

(4) In the event the State Contracting Agency has made a multiple award of Price Agreements pursuant to OAR 137-048-0270, with that multiple award of Price Agreements meeting the tier-one requirements of ORS 279C.125 and this rule, the District shall make its tier-two selection of an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor for a project-specific work order or task order from the Consultants who have executed Price Agreements with the State Contracting Agency, in accordance with the work order or task order assignment procedures established by the State Contracting Agency in the Price Agreements. If the District elects to select an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for District's public improvement through an alternative process adopted by the District, the requirements of that alternative process shall be specified in the RFP, if any, in the executed Price Agreements, or in the project-specific work order or task order assignment procedures provided to the Consultants who have executed Price Agreements, at the time the selection of a Consultant is made for the project-specific work order or task order.

(5) The State Contracting Agency shall thereafter begin Contract negotiations with the selected Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor in accordance with the negotiation provisions in PPS 48-0200 (Direct Appointment Procedure), 48-0210 (Informal Selection Procedure, or 48-0220 (Formal Selection Procedure) as applicable.

(6) Nothing in these division 48 rules should be construed to deny or limit the District's ability to contract directly with Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors pursuant to ORS 279C.125(4) through a selection process established by the District.

PPS 48-0270 Price Agreements

(1) The District may establish Price Agreements for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services when the District cannot determine the precise quantities of those services which the District shall require over a specified time period.

(2) When establishing Price Agreements under this rule, the District shall select no fewer than three Consultants, when feasible. The selection procedures for establishing Price Agreements shall be in accordance with PPS 48-0130(1) or 48-0130(2), as applicable. The District may select a single Consultant when a Price Agreement is awarded to obtain services for a specific project or a closely-related group of projects.

(3) In addition to any other applicable solicitation requirements set forth in these division 48 rules, solicitation materials and the terms and conditions for a Price Agreement for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services shall:

(a) Include a scope of services, menu of services, a specification for services or a similar description of the nature, general scope, complexity, and purpose of the procurement that will reasonably enable a prospective bidder or Proposer to decide whether to submit a bid or proposal;

(b) Specify whether the District intends to award a Price Agreement to one Consultant or to multiple Consultants. If the District shall award a Price Agreement to more than one Consultant, the Solicitation Document and Price Agreement shall describe the criteria and procedures the District shall use to select a Consultant for each individual work order or task order. Subject to the requirements of ORS 279C.110, the criteria and procedures to assign work orders or task orders that only involve or predominantly involve Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services are at the District's sole discretion; provided, however, in circumstances where a direct contract is not permitted under PPS 48-0200 and a state agency is conducting the solicitation, the selection criteria cannot be based on pricing policies, pricing proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead. In accordance with PPS 48-0130(2) applicable to Related services procurements, the selection criteria and procedures may be based solely on the qualifications of the Consultants, solely on pricing information, or a combination of both qualifications and pricing information. Pricing information for the District's solicitation of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, or any Contracting Agency's solicitation of Related services, may include the number of hours proposed for the Related services required, expenses, hourly rates, the number of hours, overhead, and other price factors. Work order or task order assignment procedures under Price Agreements may include direct appointments, subject to the requirements of PPS 48-0200; and

(c) Specify the maximum term for assigning Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under the Price Agreement.

(4) When the Solicitation materials and terms and conditions for a Price Agreement involve a two-tiered selection process pursuant to ORS 279C.125 and OAR 137-048-0260(1), the Solicitation materials and terms and conditions for a Price Agreement shall meet the requirements of subsection (3) of this rule, except as provided in this subsection (4). In the event of a planned multiple award of Price Agreements under a procurement, the Solicitation materials and terms and conditions for the Price Agreements shall include assignment procedures for project-specific work orders or task orders that will allow the District to select an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor for a work order or task order from the Consultants who have executed Price Agreements with the State Contracting Agency. If the District decides to use an alternative process adopted by the District for its tier-two selection process, however, the District's alternative process shall be described in the Solicitation materials and terms and conditions supporting the initial award of Price Agreements, in the executed Price Agreements, or in the project-specific assignment procedures for a work order or task order that are provided to the firms who have executed Price Agreements, at the time of selection for the project-specific work order or task order. The District's alternative process may be structured to take into account the unique circumstances of the District and may include provisions to allow the District to perform its tier two responsibilities efficiently and economically, alone or in cooperation with other Local Contracting Agencies, including, but not limited to, the methods specified in PPS 48-0260(3)(b).

(5) All Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services assigned under a Price Agreement require a written work order or task order issued by the District. Any work orders or task orders assigned under a Price Agreement shall include, at a minimum, the following:

(a) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(b) The Consultant's performance obligations and performance schedule;

(c) The payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the work order or task order that is fair and reasonable to the District, as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services;

(d) Language that incorporates all applicable terms and conditions of the Price Agreement into the work order or task order; and

(e) Any other provisions the District believes to be in the District's best interest.

PPS 48-0280 FSCP

The Superintendent may establish an FSCP for a particular class of Architectural, Engineering, Land Surveying or Related services where the need for such services is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

(1) Solicitation to Create an FSCP. An FSCP can be established pursuant to an RFQ, an RFP, competitive quotes, or such other method of competitive procurement as the Superintendent deems to be appropriate given the services to be procured.

(a) The Superintendent shall document the reasons for establishing an FSCP consistent with this rule in the Solicitation file. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(b) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside of the designated class of Contracts to the FSCP.

(c) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(d) The solicitation may request a binding Price quote or rate that will become part of a subsequent Contract or may establish the pool based on qualifications alone.

(e) The solicitation may set or limit the value of the work to be performed by the FSCP.

(2) Contracting for Work From an FSCP.

(a) Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform individual projects within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual projects will be offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the Superintendent has Offered Work to all the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer), a new random FSCP list will be generated. The Superintendent may Offer Work out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for Work that is a continuation of, addition to, or is connected with Work previously performed by a Contractor on the list, and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability is required. In order to make this determination, the Superintendent shall conduct an informal procurement pursuant to PPS 46-0510 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(b) An FSCP established under this section will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(c) Appointment to an FSCP does not guarantee that a Contractor will receive a particular amount of work or any Work at all.

(d) The establishment of an FSCP does not preclude the Superintendent from procuring Work that would otherwise fall within the FSCP class of work from other Contractors through any other procurement method authorized under these rules.

(e) At any time during the term of an FSCP, the Superintendent may request confirmation from a Contractor or Contractors in the pool that the Contractor continues to maintain the skills, personnel, or other capability needed to perform the class of work.

POST-SELECTION CONSIDERATIONS

PPS 48-0300 Prohibited Payment Methodology; Purchase Restrictions

(1) Except as otherwise allowed by law, a Contracting Agency shall not enter into any Contract which includes compensation provisions that expressly provide for payment of:

(a) Consultant's costs under the Contract plus a percentage of those costs; or

(b) A percentage of the project construction costs or total project costs.

(2) Except as otherwise allowed by law, the District shall not enter into any Contract in which:

(a) The compensation paid under the Contract is solely based on or limited to the Consultant's hourly rates for the Consultant's personnel working on the project, and reimbursable expenses incurred during the performance of work on the project (sometimes referred to as a "time and materials" Contract); and

(b) The Contract does not include a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract.

(3) Except in cases of Emergency or in the particular instances noted in the subsections below, the District shall not purchase any building materials, supplies, or equipment for any building, structure, or facility constructed by or for the District from any Consultant under a Contract with the District to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services

or Related services for the building, structure, or facility. This prohibition does not apply if either of the following circumstances exists:

(a) Consultant is providing Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under a Contract with the District to perform Design-Build services or Energy Savings Performance Contract services (see PPS 49-0670 and 49-0680); or

(b) That portion of the Contract relating to the acquisition of building materials, supplies, or equipment was awarded to Consultant pursuant to applicable law governing the award of such a Contract.

PPS 48-0310 Expired or Terminated Contracts; Reinstatement

(1) If the District enters into a Contract for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services and that Contract subsequently expires or is terminated, the District may proceed as follows, subject to the requirements of section (2) of this rule:

(a) Expired Contracts. If the Contract has expired as the result of project delay caused by the District or caused by any other occurrence outside the reasonable control of the District or the Consultant, and if no more than one year has passed since the Contract expiration date, the District may amend the Contract to extend the Contract expiration date, revise the description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract to reflect any material alteration of the project made as a result of the delay, and revise the applicable performance schedule. Beginning on the effective date of the amendment, the District and the Consultant shall continue performance under the Contract as amended; or

(b) Terminated Contracts. If the District or both parties to the Contract have terminated the Contract for any reason and if no more than one year has passed since the Contract termination date, then the District may enter into a new Contract with the same Consultant to perform the remaining Architectural, Engineering and Land Surveying services or Related services not completed under the original Contract, or to perform any remaining Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services not completed under the Contract as adjusted to reflect a material alteration of the project.

(2) The District may proceed under either subsection (1)(a) or subsection (1)(b) of this rule only after making written findings that amending the existing Contract or entering into a new Contract with the Consultant will:

(a) Promote efficient use of public funds and resources and result in substantial cost savings to the District;

(b) Protect the integrity of the Public Contracting process and the competitive nature of the procurement process by not encouraging favoritism or substantially diminishing competition in the award of Contracts; and

(c) Result in a Contract that is still within the scope of the final form of the original procurement document.

PPS 48-0320 Contract Amendments

(1) The District may amend any Contract if the District, in its sole discretion, determines that the amendment is within the scope of the Solicitation Document and that the amendment would not materially impact the field of competition for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the final form of the

original procurement document. In making this determination, the District shall consider potential alternative methods of procuring the services contemplated under the proposed amendment. An amendment would not materially impact the field of competition for the services described in the Solicitation Document if the District reasonably believes that the number of Proposers would not significantly increase if the procurement document were re-issued to include the additional services.

(2) The District may amend any Contract if the additional services are required by reason of existing or new laws, rules, regulations, or ordinances of federal, state, or local agencies which affect performance of the Original Contract.

(3) All amendments to Contracts shall be in writing, shall be signed by an authorized representative of the Consultant and the District, and shall receive all required approvals before the amendments will be binding on the District.

(4) Amendments That Would Cause a Contract to Exceed the Superintendent's Authority. An amendment to a contract approved by the Superintendent that would cause the total Contract Price to exceed the Superintendent's delegated authority to approve contracts under PPS 45-0200 shall be approved by the School Board except as provided in PPS 45-0200.

END OF DIVISION 48

PPS DIVISION 49

DISTRICT PUBLIC CONTRACTING RULES FOR CONTRACTS FOR PUBLIC IMPROVEMENTS AND/OR PUBLIC WORKS

PPS 49-0100 Application

(1) These division 49 rules apply to Public Improvement Contracts as well as Public Contracts for ordinary construction services that are not Public Improvements. The rules that apply specifically to Public Improvement Contracts are so identified. These division 49 rules apply to Contracts for Construction Manager/General Contractor services, whether the initial Contract between the parties includes both pre-construction services and construction services, or only contains pre-construction services, since the underlying procurement for Construction Manager/General Contractor services authorizes the District to enter into Contracts for both pre-construction and construction services.

(2) These division 49 rules address matters covered in ORS Chapter 279C (with the exception of Architectural, Engineering, Land Surveying and Related services, all of which are addressed in division 48 of the rules).

PPS 49-0110 Policies

In addition to the general Code policies set forth in ORS 279A.015, the 279C.300 policy on competition and the 279C.305 policy on least-cost for Public Improvements apply to these division 49 rules.

PPS 49-0120 Definitions

(3) **Conduct Disqualification** means a Disqualification under ORS 279C.440 in accordance with PPS 49-0370.

(4) **Disqualification** means the preclusion of a Person from contracting with the District for a period of time in accordance with PPS 49-0370.

(5) **Foreign Contractor** means a Contractor that is not domiciled in or registered to do business in the State of Oregon. See PPS 49-0490.

(6) **Notice** means any of the alternative forms of Public announcement of procurements, as described in PPS 49-0210.

(7) **Work** means the furnishing of all services, materials, equipment, labor and incidentals necessary to successfully complete any individual item or the entire Contract and the carrying out and completion of all duties and obligations imposed by the Contract.

PPS 49-0130 Competitive Bidding Requirement

The District shall solicit Bids for Public Improvement Contracts by Invitation to Bid ("ITB"), except as otherwise allowed or required pursuant to ORS 279C.335 on competitive bidding exceptions and exemptions, ORS 279A.030 on federal law overrides, or ORS 279A.100 on affirmative action. Also see PPS 49-0600 through 49-0690 regarding the use of Alternative Contracting Methods, use of Alternative Contracting Methods for projects which are excepted or exempt from the competitive bidding process, use of Alternative Contracting Methods within the competitive bidding process and the process for obtaining an exemption from competitive bidding requirements.

PPS 49-0140 Contracts for Construction Other Than Public Improvements

(1) **Procurement Under ORS Chapter 279B**. Pursuant to ORS 279C.320, Public Contracts for construction services that are not Public Improvement Contracts may be procured and amended as general trade services under the provisions of ORS 279B rather than under the provisions of ORS 279C and these division 49 rules.

(2) Emergency Construction Contracts. Emergency Contracts for construction services are not Public Improvement Contracts and are regulated under ORS 279B.080. See PPS 49-0150.

(3) Application of ORS Chapter 279C. Non-procurement provisions of ORS Chapter 279C and these division 49 rules may still be applicable to the resulting Contracts. See, for example, particular statutes on Disqualification (279C.440, 445, 450); Legal Actions (279C.460 and 465); Required Contract Conditions 279C.505, 515, 520, and 530); Hours of Labor (279C.540 and 545); Retainage (279C.550, 560, 565 and 570); Subcontracts (279C.580); Action on Payment Bonds (279C.600, 605, 610, 615, 620, 625); Termination (ORS 279C.650, 655, 660, 670); and all of the Prevailing Wage Rates requirements (279C.800 through .870) for Public Works Contracts.

PPS 49-0146 Class Exemptions; Public Improvement Contracts

The Local Contract Review Board declares the following Contracts listed in this section as classes of Public Improvement Contracts exempt from competitive bidding.

(1) Donated Public Improvements. The Superintendent may authorize a Person to construct a Public Improvement without competitive Bidding or other competitive process and regardless of dollar amount, if:

(a) The Person has agreed to donate all or a significant portion of the materials or services necessary to construct the Public Improvement or perform the service; and

(b) The Person enters into a license or agreement with the District whereby the Person agrees to comply with the Public Contract requirements applicable to the particular project and any requirements that the District deems necessary or beneficial to protect the District.

(2) Benson House Program Contracts. The Superintendent may directly negotiate a Public Improvement Contract without complying with the competitive procurement requirements of these rules where the Contract is for the purpose of supporting the Benson Polytechnic High School Building Construction Class, and all or a portion of the Contract Price is discounted or donated to the District.

(3) Purchases Under Contracts Solicited by Nonprofit Procurement Organizations of Which the District Is a Member. The Superintendent may purchase Public Improvements under a Contract or procurement solicited by a Nonprofit Procurement Organization of which it is a member. For the purposes of this Special procurement, such a Nonprofit Procurement Organization will be considered a "Contracting Purchasing Group" under PPS 46-0400 through 46-0480, and a procurement shall comply with the requirements for Joint Cooperative Procurements pursuant to PPS 46-0420.

(4) FSCP. The Superintendent may establish an FSCP for a particular class of Public Improvements where the need for such Work is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly that it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

(a) Solicitation to Create an FSCP. An FSCP for Public Improvements shall be solicited based on the total cost of the work estimated to be awarded through the FSCP during its life. If the total amount of the work is estimated to be over $100,000, the Superintendent shall use a formal RFQ process pursuant to PPS 49-0645 or an RFP process pursuant to PPS 49-0650. If the total amount of the work is $100,000 or less, the FSCP may be solicited pursuant to the intermediate procurement process set forth in PPS 49-0160.

(A) The Superintendent shall document the reasons for establishing an FSCP consistent with this rule in the Solicitation file. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(B) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside of the designated class of Contracts to the FSCP.

(C) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(D) The solicitation may request a binding Price quote or time and materials rate that will become part of a subsequent Contract or may establish the pool based on qualification alone.

(E) The solicitation may set or limit the value of the work performed by the FSCP.

(b) Contracting for Work from an FSCP. Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform specific Work within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual Work will be Offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the Superintendent has Offered a Contract to all the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer), a new random FSCP list will be generated. The Superintendent may offer a Contract to Contractors out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for a Public Improvement that is a continuation of, an addition to, or connected with a Public Improvement previously constructed by a Contractor on the list, and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work or provided the prior goods.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability or capacity is required. In order to make this determination, the Superintendent shall conduct an intermediate procurement pursuant to PPS 49-0160 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(c) An FSCP established under this section will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(d) Appointment to an FSCP does not guarantee that a contractor will receive a particular amount of work or orders or any work or orders at all.

(e) The establishment of an FSCP does not preclude the Superintendent from procuring public improvements that would otherwise fall within the FSCP from other contractors through any other procurement method authorized under these rules.

(f) At any time during the term of an FSCP, the Superintendent may request confirmation from a contractor or contractors in the pool that the Contractor continues to maintain the skills, personnel, inventory or other capability needed to perform the class of work or provide the required goods.

(g) If an FSCP for public improvements is reasonably estimated to include projects that will total over $50,000 during the life of the FSCP, public improvement contracts awarded to Contractors on an FSCP list shall require the payment of prevailing wages pursuant to ORS 279C.800 through 279C.870.

(5) Price Agreements.

(a) Price Agreements may be established for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining District requirements for volume discounts, creating standardization among agencies, and reducing lead time for ordering. The Superintendent may enter into Price Agreements to purchase Public Improvements for an anticipated need at a predetermined price, but the Contract shall be solicited by a competitive procurement process pursuant to the requirements of these rules based on the total Contract Price.

(b) The Superintendent may purchase Public Improvements from a Contractor awarded a Price Agreement without first undertaking additional competitive solicitation up to the amount set forth in the Price Agreement.

(c) The Superintendent may use the Price Agreement entered into by another Oregon Public Agency when the Original Contract was let pursuant to PPS 46-0420.

(d) The term of the Price Agreement, including renewals, may not exceed the term stated in the original solicitation.

(e) If a Price Agreement for Public Improvements will exceed $50,000 over the term of the Agreement, the Contract shall require the payment of prevailing wages pursuant to ORS 279C.800 through 279C.870.

(6) Expedited Contracting Process in Order to Access State, Federal, or Grant Funding. The Superintendent may waive any or all of the Solicitation procedures under this division 49 in the following circumstances:

(a) The state or federal government or granting entity has adopted a funding program or made funding available to assist the District in constructing Public Improvements and has attached a time deadline to have a Contract in place, a project underway, or a project completed in order for the District to access or be eligible for those funds. Such programs include, without limitation, the American Recovery and Reinvestment Act of 2009 ("ARRA") and similar programs.

(b) The Superintendent determines that compliance with the Solicitation procedures in this division 49 could jeopardize the District's ability to access or be eligible for such funding under the timeline established by the state or federal government or granting entity.

(c) The Superintendent provides for an alternative contracting process.

(d) The reasons for and extent of the waiver are documented in the Solicitation file.

(e) Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on Contracts subject to this exemption in any dollar amount, but will report the nature and amount of the Contract to the School Board if the Contract is over the Superintendent's delegated authority as set forth in PPS 45-0200(4)(b)(A).

PPS 49-0150 Emergency Contracts; Bidding and Bonding Exemptions

(1) Emergency Declaration. The Superintendent may declare that Emergency circumstances exist that require prompt execution of a Public Contract for Emergency construction or repair Work. The declaration shall be by a written declaration that describes the circumstances creating the Emergency and

the anticipated harm from failure to enter into an Emergency Contract. The Emergency declaration shall be kept on file as a public record.

(2) Competition for Emergency Contracts. Pursuant to ORS 279C.320(1), Emergency Contracts are regulated under ORS 279B.080, which provides that, for an Emergency Procurement of construction services, the District shall ensure competition that is reasonable and appropriate under the Emergency circumstances, and may include written requests for Offers, oral requests for Offers, or direct appointments without competition in cases of extreme necessity, in whatever solicitation time periods the Superintendent considers reasonable in responding to the Emergency.

(3) Emergency Contract Scope. Although no dollar limitation applies to Emergency Contracts, the scope of the Contract shall be limited to Work that is necessary and appropriate to remedy the conditions creating the Emergency as described in the declaration.

(4) Emergency Contract Modification. Emergency Contracts may be modified by change order or amendment to address the conditions described in the original declaration or an amended declaration that further describes additional Work necessary and appropriate for related Emergency circumstances. Emergency contract modifications are not subject to the requirements or limitations of PPS 47-0800 or PPS 49-0910.

(5) Excusing Bonds. Pursuant to ORS 279C.380(4) and this rule, the Emergency declaration may also state that the District waives the requirement of furnishing a performance bond and payment bond for the Emergency Contract. After making such an Emergency declaration, those bonding requirements are excused for the procurement, but this Emergency declaration does not affect the separate Public Works bond requirement for the benefit of BOLI in enforcing prevailing wage rate and overtime payment requirements. See PPS 49-0815 and BOLI rules at OAR 839-025-0015.

PPS 49-155 Small Procurements. A public improvement contract with a value less than $25,000 may be solicited by any method that the Superintendent deems in the best interests of the District, including direct negotiation.

PPS 49-0160 Intermediate Procurements; Competitive Quotes and Amendments

(1) General. Public Improvement Contracts estimated by the District not to exceed $100,000 may be awarded in accordance with intermediate level procurement procedures for competitive quotes established by this rule.

(2) Selection Criteria. The selection criteria may be limited to price or some combination of price, experience, specific expertise, availability, project understanding, contractor capacity, responsibility, and similar factors.

(3) Request for Quotes. The District shall utilize written requests for quotes whenever reasonably practicable. Written requests for quotes shall include the selection criteria to be utilized in selecting a Contractor and, if the criteria are not of equal value, their relative value or ranking. When requesting quotations orally, prior to requesting the price quote the District shall state any additional selection criteria and, if the criteria are not of equal value, their relative value. For Public Works Contracts, oral quotations may be utilized only in the event that written copies the prevailing wage rates are not required by BOLI (e.g., if the total project cost is $50,000 or less or is not otherwise subject to payment of prevailing wages).

(4) Number of Quotes; Record Required. The District shall seek at least three competitive quotes and keep a written record of the sources and amounts of the quotes received. If three quotes are not reasonably available, the District shall make a written record of the effort made to obtain those quotes.

(5) Award. If awarded, the District shall award the Contract to the prospective Contractor whose quote will best serve the interests of the District, taking into account the announced selection criteria. If

award is not made to the Offeror offering the lowest price, the District shall make a written record of the basis for award.

(6) Amendments. Amendments of Intermediate-level Public Improvement Contracts that exceed the thresholds stated in section (1) of this rule are specifically authorized by the Code when made in accordance with PPS 49-0910. Accordingly, such amendments are not considered new procurements and do not require an exemption from competitive bidding.

FORMAL PROCUREMENT RULES

PPS 49-0200 Solicitation Documents; Required Provisions; Assignment or Transfer

(1) Solicitation Document. Pursuant to ORS 279C.365 and this rule, the Solicitation Document shall include the following:

(a) General Information.

(A) Identification of the Public Improvement project, including the character of the work, and applicable plans, specifications, and other Contract documents;

(B) Notice of any pre-Offer conference as follows:

(i) The time, date, and location of any pre-Offer conference;

(ii) Whether attendance at the conference will be mandatory or voluntary; and

(iii) That statements made by the District's representatives at the conference are not binding on the District unless confirmed by written Addendum.

(C) The deadline for submitting mandatory prequalification applications and the class or classes of work for which Offerors shall be prequalified if prequalification is a requirement;

(D) The name and title of the District official designated for receipt of Offers and contact Person (if different);

(E) Instructions and information concerning the form and submission of Offers, including the address of the office to which Offers shall be delivered, any bid or proposal security requirements, and any other required information or special information, e.g., whether Offers may be submitted by facsimile or electronic means (See PPS 49-0300 regarding facsimile Bids or Proposals and PPS 49-0310 regarding electronic procurement);

(F) The time, date, and place of Opening;

(G) The time and date of Closing after which the District shall not accept Offers, which time shall be not less than five days after the date of the last publication of the advertisement. Although a minimum of five days is prescribed, the District is encouraged to use at least a 14-day solicitation period when feasible. If the District is issuing an ITB that may result in a Public Improvement Contract with a value in excess of $100,000, the District shall designate a time of Closing consistent with the first-tier subcontractor disclosure requirements of ORS 279C.370(1)(b) and PPS 49-0360. For timing issues relating to Addenda, see PPS 49-0250;

(H) The office where the specifications for the work may be reviewed;

(I) A statement that each bidder to an ITB shall identify whether the bidder is a "resident bidder," as defined in ORS 279A.120;

(J) If the Contract resulting from a solicitation will be a Contract for a Public Work subject to ORS 279C.800 to 279C.870 or the Davis-Bacon Act (40 U.S.C. 3141 to 3148), a

statement that no Offer will be received or considered by the District unless the Offer contains a statement by the Offeror as a part of its Offer that "Contractor agrees to be bound by and will comply with the provisions of ORS 279C.838, 279C.840, or 40 U.S.C. 3141 to 3148";

(K) A statement that the District shall not receive or consider an Offer for a Public Improvement Contract unless the Offeror is registered with the Construction Contractors Board or is licensed by the State Landscape Contractors Board as specified in PPS 49-0230;

(L) Whether a Contractor or a subcontractor under the Contract shall be licensed under ORS 468A.720 regarding asbestos abatement projects;

(M) Contractor's certification of nondiscrimination in obtaining required subcontractors in accordance with ORS 279A.110(4) (see PPS 49-0440(3));

(N) How the District shall notify Offerors of Addenda and how the District shall make Addenda available (see PPS 49-0250); and

(O) When applicable, instructions and forms regarding First-Tier Subcontractor Disclosure requirements, as set forth in PPS 49-0360.

(b) Evaluation Process.

(A) A statement that the District may reject any Offer not in compliance with all prescribed Public Contracting procedures and requirements, including the requirement to demonstrate the bidder's responsibility under ORS 279C.375(3)(b), and may reject for Good Cause all Offers after finding that doing so is in the public interest.

(B) The anticipated solicitation schedule, deadlines, protest process, and evaluation process, if any;

(C) Evaluation criteria, including the relative value applicable to each criterion, that the District shall use to determine the Responsible bidder with the lowest Responsive Bid (where award is based solely on price) or the Responsible Proposer or Proposers with the best Responsive proposal or Proposals (where use of competitive Proposals is authorized under ORS 279C.335 and PPS 49-0620), along with the process the District shall use to determine acceptability of the work;

(D) If the Solicitation Document is an Invitation to Bid, the District shall set forth any special price evaluation factors in the Solicitation Document. Examples of such factors include, but are not limited to, conversion costs, transportation cost, volume weighing, trade-in allowances, cash discounts, depreciation allowances, cartage penalties, and ownership or life cycle Cost formulas. Price evaluation factors need not be precise predictors of actual future costs; but to the extent possible, such evaluation factors shall be objective, reasonable estimates based on information the District has available concerning future use; and

(E) If the Solicitation Document is a Request for proposal, the District shall refer to the additional requirements of PPS 49-0650; and

(c) Contract Provisions. The District shall include all Contract terms and conditions, including warranties, insurance, and bonding requirements, that the District considers appropriate for the Public Improvement project. The District shall also include all applicable Contract provisions required by Oregon law as follows:

(A) Prompt payment to all Persons supplying labor or material, contributions to Industrial Accident Fund, and liens and withholding taxes (ORS 279C.505(1));

(B) Demonstrate that an employee drug testing program is in place (ORS 279C.505(2));

(C) If the Contract calls for demolition Work described in ORS 279C.510(1), a condition requiring the Contractor to salvage or recycle construction and demolition debris, if feasible and cost-effective;

(D) If the Contract calls for lawn or landscape maintenance, a condition requiring the Contractor to compost or mulch yard waste material at an approved site, if feasible and cost-effective (ORS 279C.510(2);

(E) Payment of claims by public officers (ORS 279C.515(1));

(F) Contractor and first-tier subcontractor liability for late payment on Public Improvement Contracts pursuant to ORS 279C.515(2), including the rate of interest;

(G) Person's right to file a complaint with the Construction Contractors Board for all Contracts related to a Public Improvement Contract (ORS 279C.515(3));

(H) Hours of labor in compliance with ORS 279C.520;

(I) Environmental and natural resources regulations (ORS 279C.525);

(J) Payment for medical care and attention to employees (ORS 279C.530(1);

(K) A Contract provision substantially as follows: "All employers, including Contractor, that employ subject workers who work under this Contract in the State of Oregon shall comply with ORS 656.017 and provide the required workers' compensation coverage, unless such employers are exempt under ORS 656.126. Contractor shall ensure that each of its subcontractors complies with these requirements." (ORS 279C.530(2));

(L) Maximum hours, holidays, and overtime (ORS 279C.540);

(M) Time limitation on claims for overtime (ORS 279C.545);

(N) Prevailing wage rates (ORS 279C.800 through 279C.870);

(O) BOLI Public Works bond (ORS 279C.830(2)

(P) Retainage (ORS 279C.550 through 279C.570);

(Q) Prompt payment policy, progress payments, rate of interest (ORS 279C.570);

(R) Contractor's relations with subcontractors (ORS 279C.580);

(S) Notice of claim (ORS 279C.605);

(T) Contractor's certification of compliance with the Oregon tax laws in accordance with ORS 305.385; and

(U) Contractor's certification that all subcontractors performing Work described in ORS 701.005(2) (i.e., construction Work) will be registered with the Construction Contractors Board or licensed by the State Landscape Contractors Board in accordance with ORS 701.035 through 701.055 before the subcontractors commence Work under the Contract.

(2) Assignment or Transfer Restricted. Unless otherwise provided in the Contract, the Contractor shall not assign, sell, dispose of or transfer rights, or delegate duties under the Contract, either in whole or in part, without the District's prior written consent. Unless otherwise agreed by the District in writing, such consent shall not relieve the Contractor of any obligations under the Contract. Any assignee or transferee shall be considered the agent of the Contractor and be bound to abide by all provisions of the Contract. If the District consents in writing to an assignment, sale, disposal, or transfer of the Contractor's

rights or delegation of Contractor's duties, the Contractor and its surety, if any, shall remain liable to the District for complete performance of the Contract as if no such assignment, sale, disposal, transfer, or delegation had occurred unless the District otherwise agrees in writing.

PPS 49-0210 Notice and Advertising Requirements; Posting

(1) Notice and Distribution Fee. The District shall furnish notice as set forth below in subsections (a) through(c) to a number of Persons sufficient for the purpose of fostering and promoting competition. The notice shall indicate where, when, how, and for how long the Solicitation Document may be obtained and generally describe the Public Improvement project or Work. The notice may contain any other appropriate information. The District may charge a fee or require a deposit for the Solicitation Document. The District may furnish notice using any method determined to foster and promote competition, including:

(a) Mailing notice of the availability of Solicitation Documents to Persons that have expressed an interest in the District's procurements;

(b) Placing notice on the District's electronic procurement System; or

(c) Placing notice on the District's Internet Web site.

(2) Advertising. Pursuant to ORS 279C.360 and this rule, the District shall advertise every solicitation for competitive Bids or competitive Proposals for a Public Improvement Contract, unless the Contract Review Board has exempted the Solicitation from the advertisement requirement as part of a competitive bidding exemption under ORS 279C.335.

(a) Unless the District publishes by Electronic Advertisement as permitted under subsection 2(b) of this rule, the District shall publish the advertisement for Offers at least once in at least one newspaper of general circulation in the area where the Contract is to be performed and in as many additional issues and publications as the District may determine to be necessary or desirable to foster and promote competition.

(b) The District may publish by Electronic Advertisement if the Contract Review Board determines that Electronic Advertisement is likely to be cost effective.

(c) In addition to the District's publication required under subsections 2(a) or 2 (b), the District shall also publish an advertisement for Offers in at least one trade newspaper of general statewide circulation if the Contract is for a Public Improvement with an estimated cost in excess of $125,000.

(d) All advertisements for Offers shall set forth:

(A) The Public Improvement project;

(B) The office where Contract terms, conditions, and specifications may be reviewed;

(C) The date that Persons shall file applications for prequalification under ORS 279C.340, if prequalification is a requirement, and the class or classes of work for which Persons shall be prequalified;

(D) The scheduled Closing, which shall not be less than five days after the date of the last publication of the advertisement;

(E) The name, title, and address of the District official authorized to receive Offers;

(F) The scheduled Opening; and

(G) If applicable, that the Contract is for a Public Work subject to ORS 279C.800 to ORS 279C.870 or the Davis-Bacon Act (40 U.S.C. 3141 to 3148).

PPS 49-0220 Prequalification of Offerors

(1) Prequalification. Pursuant to ORS 279C.430 and this rule, two types of prequalification are authorized:

(a) Mandatory Prequalification. The District may require mandatory prequalification of Offerors. The District shall indicate in the Solicitation Document if it will require mandatory prequalification. Mandatory prequalification is when the District conditions a Person's submission of an Offer on the Person's prequalification. The District shall not consider an Offer from a Person that is not prequalified if the District required prequalification.

(b) Permissive Prequalification. The District may prequalify a Person for the District's solicitation list, but in permissive prequalification the District shall not limit distribution of a solicitation to that list.

(c) Prequalification Procedure. When prequalification is required or allowed, a Person shall submit a prequalification application to the District on the form prescribed by the District. The District shall determine if the applicant is qualified within 30 days of the date of application, or sooner if practicable and so requested by the applicant to enable the applicant to participate in Bidding on an advertised Contract. If the District finds that the applicant is qualified, the District shall provide notice to the applicant of the nature and type of Contracts the applicant is qualified to bid on and the period of time for which the qualification is valid.

(2) Prequalification Presumed. If an Offeror is currently prequalified by either the Oregon Department of Transportation or the Oregon Department of Administrative services to perform Contracts, the Offeror shall be rebuttably presumed qualified to perform similar Work for the District.

(3) Standards for Prequalification. A Person may prequalify by demonstrating to the District's satisfaction:

(a) The Person's financial, material, equipment, facility, and personnel resources and expertise, or ability to obtain such resources and expertise, indicate that the Person is capable of meeting all contractual responsibilities;

(b) The Person's record of performance;

(c) The Person's record of integrity;

(d) The Person is qualified to contract with the District. (See PPS 49-0390(2) regarding standards of responsibility.)

(4) Notice of Denial. If a Person fails to prequalify for a mandatory prequalification, the District shall notify the Person, specify the reasons under section (3) of this rule and inform the Person of the Person's right to a hearing under ORS 279C.445 and 279C.450 as provided in section (6) of this rule.

(5) Revocation of Prequalification. If the District has reasonable cause to believe that there has been a substantial change in the conditions of a prequalified Person and that the Person is no longer qualified or is less qualified, the District may revoke or revise and reissue the prequalification after reasonable notice to the prequalified Person. The notice shall specify the reasons under section (3) of this rule and inform the Person of the Person's right to a hearing under ORS 279C.445 and 279C.450 as provided in section (6) of this rule.

(6) Appeal of Denial or Revocation of, or Revision to Prequalification.

(a) Any Person who wishes to appeal the District decision under Sections (4) or (5) of this rule shall, within three business days after receipt of the notice of disqualification, file written notice with the District that Person appeals the decision. The District shall notify the Contract Review Board and schedule the appeal hearing before the Contract Review Board.

(b) Immediately upon receipt of the prospective bidder's or Proposer's notice of appeal, the District shall notify the local Contract Review Board.

(c) Upon the receipt of notice from the District under section (2) of this rule, the Contract Review Board shall promptly notify the Person appealing and the District of the time and place of the hearing. The Contract Review Board shall conduct the hearing and decide the appeal within 30 days after receiving the notice from the District. The Contract Review Board shall set forth in writing the reasons for the hearing decision.

(d) At the hearing the Contract Review Board shall consider de novo the notice of denial, revocation or revision of a prequalification, the standards listed in section (3) of this rule on which the District based the decision, and any evidence provided by the parties. Hearings before a Contract Review Board shall be conducted under rules of procedure adopted by the Contract Review Board.

(e) The Contract Review Board may allocate the Contract Review Board's costs for the hearing between the Person appealing and the District. The allocation shall be based on facts found by the Contract Review Board and stated in the final order that, in the Contract Review Board's opinion, warrant such allocation of costs. If the final order does not allocate the costs for the hearing, the costs shall be paid as follows:

(A) If the decision to deny, revoke, or revise a prequalification of a Person as a bidder is upheld, the cost shall be paid by the Person appealing the decision.

(B) If the decision to deny, revoke, or revise a prequalification of a Person as a bidder is reversed, the costs shall be paid by the District.

(f) Judicial review of any decision by the Contract Review Board shall be as set forth in ORS 279C.450.

PPS 49-0230 Eligibility to Bid or Propose; Registration or License

(1) Construction Contracts. The District shall not consider a Person's Offer to do Work as a Contractor, as defined in ORS 701.005(2), unless the Person has a current, valid certificate of registration issued by the Construction Contractors Board at the time the Offer is made.

(2) Landscape Contracts. The District shall not consider a Person's Offer to do Work as a landscape contractor as defined in ORS 671.520(2), unless the Person has a current, valid landscape contractor's license issued pursuant to ORS 671.560 by the State Landscape Contractors Board at the time the offer is made.

(3) Non-Complying Entities. The District shall deem an Offer received from a Person that fails to comply with this rule Non-Responsive and shall reject the Offer as stated in ORS 279C.365(1)(k), unless contrary to federal law or subject to different timing requirements set by federal funding or the District.

PPS 49-0240 Pre-Offer Conferences

(1) Purpose. The District may hold pre-Offer conferences with prospective Offerors prior to Closing to explain the procurement requirements, obtain information, or conduct site inspections.

(2) Required Attendance. The District may require attendance at the pre-Offer conference as a condition for making an Offer. Unless otherwise specified in the Solicitation Document, a mandatory attendance requirement is considered to have been met if, at any time during the mandatory meeting, a representative of the Offering firm is present.

(3) Scheduled Time. If the District holds a pre-Offer conference, it shall be held within a reasonable time after the Solicitation Document has been issued, but sufficiently before the Closing to allow Offerors to consider information provided at that conference.

(4) Statements Not Binding. Statements made by the District's representative at the pre-Offer conference do not change the Solicitation Document unless the District confirms such statements with a written Addendum to the Solicitation Document.

(5) District Announcement. The District shall set forth notice of any pre-Offer conference in the Solicitation Document in accordance with PPS 49-0200(1)(a)(B).

PPS 49-0250 Addenda to Solicitation Documents

(1) Issuance; Receipt. The District may change a Solicitation Document only by written Addenda. An Offeror shall provide written acknowledgement of receipt of all issued Addenda with its Offer, unless the District otherwise specifies in the Addenda or in the Solicitation Document.

(2) Notice and Distribution. The District shall notify prospective Offerors of Addenda consistent with the standards of notice set forth in PPS 49-0210(1). The Solicitation Document shall specify how the District shall provide notice of Addenda and how the District shall make the Addenda available (see PPS 49-0200(1)(a)(N). For example, "The District shall not mail notice of Addenda, but will publish notice of any Addenda on the District's Web site. Addenda may be downloaded off the District's Web site. Offerors should frequently check the District's Web site until Closing, i.e., at least once weekly until the week of Closing, and at least once daily during the week of the Closing."

(3) Timelines; Extensions. The District shall issue Addenda within a reasonable time to allow prospective Offerors to consider the Addenda in preparing their Offers. The District may extend the Closing if the District determines that prospective Offerors need additional time to review and respond to Addenda. Except to the extent required by public interest, the District shall not issue Addenda less than 72 hours before the Closing unless the Addendum also extends the Closing.

(4) Request for Change or Protest. Unless a different deadline is set forth in the Addendum, an Offeror may submit a written request for change or protest to the Addendum, as provided in PPS 49-0260, by the close of the District's next business day after issuance of the Addendum, or up to the last day allowed to submit a request for change or protest under PPS 49-0260, whichever date is later. The District shall consider only an Offeror's request for change or protest to the Addendum; the District shall not consider a request for change or protest to matters not added or modified by the Addendum, unless the Offeror submits the request for change or protest before the deadline for the District's receipt of request for change or protests as set forth in PPS 49-0260(2) and (3).

PPS 49-0260 Request for Clarification or Change; Solicitation Protests

(1) Clarification. Prior to the deadline for submitting a written request for change or protest, an Offeror may request that the District clarify any provision of the Solicitation Document. The District's clarification to an Offeror, whether orally or in writing, does not change the Solicitation Document and is not binding on the District unless the District amends the Solicitation Document by Addendum.

(2) Request for Change.

(a) Delivery. An Offeror may request in writing a change to the specifications or Contract terms and conditions. Unless otherwise specified in the Solicitation Document, an Offeror shall deliver the written request for change to the District not less than ten (10) days prior to Closing;

(b) Content of Request for Change.

(A) An Offeror's written request for change shall include a statement of the requested change(s) to the Contract terms and conditions, including any specifications, together with the reason for the requested change.

(B) An Offeror shall mark its request for change as follows:

(i) "Contract Provision Request for change"; and

(ii) Solicitation Document number (or other identification as specified in the Solicitation Document).

(3) Protest.

(a) Delivery. An Offeror may protest specifications or Contract terms and conditions. Unless otherwise specified in the Solicitation Document, an Offeror shall deliver a written protest on those matters to the District not less than ten (10) days prior to Closing.

(b) Content of Protest.

(A) An Offeror's written protest shall include:

(i) A detailed statement of the legal and factual grounds for the protest;

(ii) A description of the resulting prejudice to the Offeror; and

(iii) A statement of the desired changes to the Contract terms and conditions, including any specifications.

(B) An Offeror shall mark its protest as follows:

(i) "Contract Provision Protest"; and

(ii) Solicitation Document number (or other identification as specified in the Solicitation Document).

(4) The Response. The District is not required to consider an Offeror's request for change or protest after the deadline established for submitting such request or protest. The District shall provide notice to the applicable Person if it entirely rejects a protest. If the District agrees with the Person's request or protest, in whole or in part, the District shall either issue an Addendum reflecting its determination under PPS 49-0260 or cancel the Solicitation under PPS 49-0270.

(5) Extension of Closing. If the District receives a written request for change or protest from an Offeror in accordance with this rule, the District may extend Closing if the District determines an extension is necessary to consider the request or protest and issue an Addendum, if any, to the Solicitation Document.

(6) Failure to Protest or Request a Change Precludes Protest of Award on Such Issue. An Offeror cannot protest an award based on any issue that could have, but was not, raised as a Request for Change or Protest of solicitation.

PPS 49-0270 Cancellation of Solicitation Document

(1) Cancellation in the Public Interest. The District may cancel a solicitation for Good Cause if the District finds that cancellation is in the public interest. The District's reasons for cancellation shall be made part of the Solicitation file.

(2) Notice of Cancellation. If the District cancels a solicitation prior to Opening, the District shall provide notice of cancellation in accordance with PPS 49-0210(1). Such notice of cancellation shall:

(a) Identify the Solicitation;

(b) Briefly explain the reason for cancellation; and

(c) If appropriate, explain that an opportunity will be given to compete on any resolicitation.

(3) Disposition of Offers.

(a) Prior to Offer Opening. If the District cancels a solicitation prior to Offer Opening, the District shall return all Offers it received to Offerors unopened, provided the Offeror submitted its Offer in a hard copy format with a clearly visible return address. If there is no return address on the envelope, the District shall open the Offer to determine the source and then return it to the Offeror.

(b) After Offer Opening. If the District rejects all Offers, the District shall retain all such Offers as part of the District's Solicitation file.

PPS 49-0280 Offer Submissions

(1) Offer and Acceptance. The bid or proposal is the bidder's or Proposer's Offer to enter into a Contract.

(a) In competitive bidding and competitive Proposals, the Offer is always a "Firm Offer," i.e., the Offer shall be held open by the Offeror for the District's acceptance for the period specified in PPS 49-0410. The District may elect to accept the Offer at any time during the specified period, and the District's award of the Contract to a bidder constitutes acceptance of the Offer and binds the Offeror to the Contract.

(b) Notwithstanding the fact that a competitive proposal is a Firm Offer for the period specified in PPS 49-0410, the District may elect to discuss or negotiate certain Contractual provisions, as identified in these rules or in the Solicitation Document, with the Proposer. See PPS 49-0650 on Requests for Proposals and PPS 49-0290 on bid or proposal Security. Where negotiation is permitted by the rules or the Solicitation Document, Proposers are bound to an obligation to negotiate in good faith and only on those terms that the rules or the Solicitation Document has reserved for negotiation. In competitive Proposals, the Solicitation Document shall describe whether Offers are to be made and considered as "Firm Offers" that may be accepted without negotiation, as in the case of competitive Bidding, or whether Offers are subject to discussion, negotiation, or otherwise are not to be considered as final Offers. See PPS 49-0650 on Requests for Proposals and PPS 49-0290 on bid or proposal Security.

(2) Responsive Offer. The District may award a Contract only to a Responsible Offeror with a Responsive Offer.

(3) Contingent Offers. Except to the extent that an Offeror is authorized to propose certain terms and conditions pursuant to PPS 49-0650, an Offeror shall not make an Offer contingent upon the District's acceptance of any terms or conditions (including specifications) other than those contained in the Solicitation Document.

(4) Offeror's Acknowledgement. By signing and returning the Offer, the Offeror acknowledges that it has read and understands the terms and conditions contained in the Solicitation Document and that it accepts and agrees to be bound by the terms and conditions of the Solicitation Document. If the Request for proposal permits proposal of alternative terms under PPS 49-0650, the Offeror's Offer includes the nonnegotiable terms and conditions and any proposed terms and conditions offered for negotiation upon and to the extent accepted by the District in writing.

(5) Instructions. An Offeror shall submit and sign the Offer in accordance with the Solicitation Document. An Offeror shall initial and submit any corrections or erasures to their Offer prior to the Opening in accordance with the requirements for submitting an Offer under the Solicitation Document.

(6) Forms. An Offeror shall submit the Offers on the form(s) provided in the Solicitation Document, unless Offerors are otherwise instructed in the Solicitation Document.

(7) Documents. An Offeror shall provide the District with all documents and Descriptive Literature required under the Solicitation Document.

(8) Facsimile or Electronic Submissions. If the District permits facsimile or electronic Offers in the Solicitation Document, the Offeror may submit facsimile or Electronic Offers in accordance with the Solicitation Document. The District shall not consider facsimile or Electronic Offers unless authorized by the Solicitation Document.

(9) Product Samples and Descriptive Literature. The District may require Product Samples or Descriptive Literature if it is necessary or desirable to evaluate the quality, features, or characteristics of the offered items. The District shall dispose of Product Samples or return or make available for return Product Samples to the Offeror in accordance with the Solicitation Document.

(10) Identification of Offers.

(a) To ensure proper identification and handling, Offers shall be submitted in a sealed envelope appropriately marked or in the envelope provided by the District, whichever is applicable.

(b) The District is not responsible for Offers submitted in any manner or format, or to any delivery point, other than as required in the Solicitation Document.

(11) Receipt of Offers. The Offeror is responsible for ensuring that the District receives the Offers at the required delivery point prior to the Closing, regardless of the method used to submit or transmit the Offer.

PPS 49-0290 Bid or Proposal Security

(1) Security Amount. If the District requires bid or proposal security, it shall be not more than 10 percent or less than 5 percent of the Offeror's bid or proposal, consisting of the base bid or proposal together with all additive alternates. The District shall not use bid or proposal security to discourage competition. The District shall clearly state any bid or proposal security requirements in its Solicitation Document. The Offeror shall forfeit bid or proposal security after award if the Offeror fails to execute the Contract and promptly return it with any required performance bond and payment bond and, in the case of proposal security, with any required proof of insurance. See ORS 279C.365(5) and 279C.385.

(2) Requirement for Bid Security (Optional for Proposals). Unless the District has otherwise exempted a solicitation or class of solicitations from bid security pursuant to ORS 279C.390, the District shall require bid security for its solicitation of Bids for Public Improvements. This requirement applies only to Public Improvement Contracts with a value, estimated by the Contracting Agency, of more than $100,000 or, in the case of Contracts for highways, bridges and other transportation projects, more than $50,000. See ORS 279C.365(6). The District may require bid security even if it has exempted a class of solicitations from bid security. The District may require proposal security in RFPs. See ORS 279C.400(5).

(3) Form of Bid or Proposal Security. The District may accept only the following forms of bid or proposal security:

(a) A surety bond from a surety company authorized to do business in the State of Oregon;

(b) An irrevocable letter of credit issued by an insured institution as defined in ORS 706.008; or

(c) A cashier's check or Offeror's certified check.

(4) Return of Security. The District shall return or release the bid or proposal security of all unsuccessful Offerors after a Contract has been fully executed and all required bonds and insurance have been provided, or after all Offers have been rejected. The District may return the bid or proposal security of unsuccessful Offerors prior to award if the return does not prejudice Contract award and the security of

at least the bidders with the three lowest Bids, or the Proposers with the three highest scoring Proposals, is retained pending execution of a Contract.

PPS 49-0300 Facsimile Bids and Proposals

(1) District Authorization. The District may authorize Offerors to submit facsimile Offers. If the District determines that bid or proposal security is or will be required, the District shall not authorize facsimile Offers unless the District has established a method for receipt of such security. Prior to authorizing the submission of facsimile Offers, the District shall determine that the District's equipment and personnel are capable of receiving the size and volume of anticipated Offers within a short period of time. In addition, the District shall establish administrative procedures and controls:

(a) To receive, identify, record, and safeguard facsimile Offers;

(b) To ensure timely delivery of Offers to the location of Opening; and

(c) To preserve the Offers as sealed.

(2) Provisions to Be Included in Solicitation Document. In addition to all other requirements, if the District authorizes a facsimile Offer for Bids or Proposals, the District shall include in the Solicitation Document (other than in a Request for Quotes) the following:

(a) A provision substantially in the form of the following: "A 'facsimile Offer' as used in this Solicitation Document means an Offer, modification of an Offer, or withdrawal of an Offer that is transmitted to and received by the District via a facsimile machine";

(b) A provision substantially in the form of the following: "Offerors may submit facsimile Offers in response to this Solicitation Document. The entire response shall arrive at the place and by the time specified in this Solicitation Document";

(c) A provision that requires Offerors to sign their facsimile Offers;

(d) A provision substantially in the form of the following: "The District reserves the right to award the Contract solely on the basis of the facsimile Offer." However, upon the District's request, the apparent successful Offeror shall promptly submit its complete original signed Offer; and

(e) The data and compatibility characteristics of the District's receiving facsimile machine as follows:

(A) Telephone number; and

(B) Compatibility characteristics, e.g., make and model number, receiving speed, communications protocol; and

(f) A provision that the District is not responsible for any failure attributable to the transmission or receipt of the facsimile Offer including, but not limited to, the following:

(A) Receipt of garbled or incomplete documents;

(B) Availability or condition of the receiving facsimile machine;

(C) Incompatibility between the sending and receiving facsimile machine;

(D) Delay in transmission or receipt of documents;

(E) Failure of the Offeror to properly identify the Offer documents;

(F) Illegibility of Offer documents; and

(G) Security and confidentiality of data.

PPS 49-0310 Electronic Procurement

(1) General. The District may utilize Electronic Advertisement of Public Improvement Contracts in accordance with ORS 279C.360(1), provided that advertisement of such Contracts with an estimated Contract Price in excess of $125,000 shall also be published in a trade newspaper of general statewide circulation, and may post notices of intent to award electronically as provided by ORS 279C.410(7).

(2) Alternative Procedures. In the event that the District desires to direct or permit the submission and receipt of Offers for a Public Improvement Contract by electronic means, the District shall comply with PPS 47-0330 (electronic procurement under ORS 279B), taking into account ORS 279C requirements for written Bids, opening Bids publicly, bid security, first-tier subcontractor disclosure, and inclusion of prevailing wage rates.

(3) Interpretation. Nothing in this rule shall be construed as prohibiting the District from making procurement documents for Public Improvement Contracts available in electronic format as well as in hard copy when Bids are to be submitted only in hard copy. See ORS 279C.365(2).

PPS 49-0320 Pre-Closing Modification or Withdrawal of Offers

(1) Modifications. An Offeror may modify its Offer in writing prior to the Closing. An Offeror shall prepare and submit any modification to its Offer to the District in accordance with PPS 49-0280, unless otherwise specified in the Solicitation Document. Any modification shall include the Offeror's statement that the modification amends and supersedes the prior Offer. The Offeror shall mark the submitted modification as follows:

(a) Bid (or proposal) Modification; and

(b) Solicitation Number (or other identification as specified in the Solicitation Document).

(2) Withdrawals.

(a) An Offeror may withdraw its Offer by written notice submitted on the Offeror's letterhead, signed by an authorized representative of the Offeror, delivered to the location specified in the Solicitation Document (or the place of Closing if no location is specified), and received by the District prior to the Closing. The Offeror or authorized representative of the Offeror may also withdraw its Offer in person prior to the Closing, upon presentation of appropriate identification and satisfactory evidence of authority;

(b) The District may release an unopened Offer withdrawn under section (2)(a) of this rule to the Offeror or its authorized representative after voiding any date and time stamp mark;

(c) The Offeror shall mark the written request to withdraw an Offer as follows:

(A) Bid (or proposal) Withdrawal; and

(B) Solicitation number (or other identification as specified in the Solicitation Document).

(3) Documentation. The District shall include all documents relating to the modification or withdrawal of Offers in the appropriate Solicitation file.

PPS 49-0330 Receipt, Opening, and Recording of Offers; Confidentiality of Offers

(1) Receipt. The District shall electronically or mechanically time-stamp or hand-mark each Offer and any modification upon receipt. The District shall not open the Offer or modification upon receipt, but shall maintain it as confidential and secure until Opening. If the District inadvertently opens an Offer or a modification prior to the Opening, the District shall return the Offer or modification to its secure and confidential state until Opening. The District shall document the resealing for the Solicitation file (e.g., "The District inadvertently opened the Offer due to improper identification of the Offer").

(2) Opening and Recording. The District shall publicly open Offers, including any modifications made to the Offer, pursuant to PPS 49-0320. In the case of Invitations to Bid, to the extent practicable, the District shall read aloud the name of each bidder, the bid price(s), and such other information as the District considers appropriate. In the case of Requests for Proposals or voluminous Bids, if the Solicitation Document so provides, the District shall not read Offers aloud.

(3) Availability. After Opening, the District shall make Bids available for public inspection, but pursuant to ORS 279C.410, Proposals are not required to be available for public inspection until after the notice of intent to award is issued. In any event, the District may withhold from disclosure those portions of an Offer that the Offeror designates as trade secrets or as confidential proprietary data in accordance with applicable law. See ORS 192.501(2); ORS 646.461 through 646.475. To the extent that the District determines such designation is not in accordance with applicable law, the District shall make those portions available for public inspection. The Offeror shall separate information designated as confidential from other non-confidential information at the time of submitting its Offer. Prices, makes, models, or catalog numbers of items offered, scheduled delivery dates, and terms of payment are not confidential, and shall be publicly available regardless of an Offeror's designation to the contrary.

PPS 49-0340 Late Bids, Late Withdrawals, and Late Modifications

Any Offer received after Closing is late. An Offeror's request for withdrawal or modification of an Offer received after Closing is late. The District shall not consider late Offers, withdrawals, or modifications except as permitted in PPS 49-0350 or 49-0390.

PPS 49-0350 Mistakes

(1) Generally. To protect the integrity of the competitive procurement process and to assure fair treatment of Offerors, the District should carefully consider whether to permit waiver, correction, or withdrawal of Offers for certain mistakes.

(2) District Treatment of Mistakes. The District shall not allow an Offeror to correct or withdraw an Offer for an error in judgment. If the District discovers certain mistakes in an Offer after Opening but before award of the Contract, the District may take the following action:

(a) The District may waive, or permit an Offeror to correct, a minor informality. A minor informality is a matter of form rather than substance that is evident on the face of the Offer, or an insignificant mistake that can be waived or corrected without prejudice to other Offerors. Examples of minor informalities include an Offeror's failure to:

(A) Return the correct number of signed Offers or the correct number of other documents required by the Solicitation Document;

(B) Sign the Offer in the designated block, provided a signature appears elsewhere in the Offer, evidencing an intent to be bound; and

(C) Acknowledge receipt of an Addendum to the Solicitation Document, provided that it is clear on the face of the Offer that the Offeror received the Addendum and intended to be bound by its terms, or the Addendum involved did not affect price, quality, or delivery.

(b) The District may correct a clerical error if the error is evident on the face of the Offer or other documents submitted with the Offer, and the Offeror confirms the District's correction in writing. A clerical error is an Offeror's error in transcribing its Offer. Unit prices shall prevail over extended prices in the event of a discrepancy between extended prices and unit prices.

(c) The District may permit an Offeror to withdraw an Offer based on one or more clerical errors in the Offer only if the Offeror shows with objective proof and by clear and convincing evidence:

(A) The nature of the error;

(B) That the error is not a minor informality under this section or an error in judgment;

(C) That the error cannot be corrected or waived under subsection (b) of this rule;

(D) That the Offeror acted in good faith in submitting an Offer that contained the claimed error and in claiming that the alleged error in the Offer exists;

(E) That the Offeror acted without gross negligence in submitting an Offer that contained a claimed error;

(F) That the Offeror will suffer substantial detriment if the District does not grant the Offeror permission to withdraw the Offer;

(G) That the District's or the public's status has not changed so significantly that relief from the forfeiture will work a substantial hardship on the District or the public it represents; and

(H) That the Offeror promptly gave notice of the claimed error to the District.

(d) The criteria in section (2)(c) of this rule shall determine whether the District shall permit an Offeror to withdraw its Offer after Closing. These criteria also shall apply to the question of whether the District shall permit an Offeror to withdraw its Offer without forfeiture of its bid bond (or other bid or proposal security), or without liability to the District based on the difference between the amount of the Offeror's Offer and the amount of the Contract actually awarded by the District, whether by award to the next lowest Responsive and Responsible bidder or the best Responsive and Responsible Proposer, or by resort to a new solicitation.

(3) Rejection for Mistakes. The District shall reject any Offer in which a mistake is evident on the face of the Offer and the intended correct Offer is not evident or cannot be substantiated from documents submitted with the Offer.

(4) Identification of Mistakes After Award. The procedures and criteria set forth above are Offeror's only opportunity to correct mistakes or withdraw Offers because of a mistake. Following award, an Offeror is bound by its Offer, and may withdraw its Offer or rescind a Contract entered into pursuant to this division 49 only to the extent permitted by applicable law.

PPS 49-0360 First-Tier Subcontractors; Disclosure and Substitution; ITB

(1) Required Disclosure. Within two working hours after the bid Closing on an ITB for a Public Improvement having a Contract Price anticipated by the District to exceed $100,000, all bidders shall submit to the District a disclosure form as described by ORS 279C.370(2), identifying any first-tier subcontractors (those entities that would be contracting directly with the prime Contractor) that will be furnishing labor or labor and materials on the Contract, if awarded, whose subcontract value would be equal to or greater than:

(a) 5 percent of the total Contract Price, but at least $15,000; or

(b) $350,000, regardless of the percentage of the total Contract Price.

(2) Bid Closing, Disclosure Deadline, and Bid Opening. For each ITB to which this rule applies, the District shall:

(a) Set the bid Closing on a Tuesday, Wednesday, or Thursday, and at a time between 2:00 p.m. and 5:00 p.m., except that these bid Closing restrictions do not apply to an ITB for maintenance or construction of highways, bridges, or other transportation facilities, and provided that the two-hour disclosure deadline described by this rule would not then fall on a legal holiday;

(b) Open Bids publicly immediately after the bid Closing; and

(c) Consider for Contract award only those Bids for which the required disclosure has been submitted by the announced deadline on forms prescribed by the District.

(3) Bidder Instructions and Disclosure Form. For the purposes of this rule, the District in its solicitation shall:

(a) Prescribe the disclosure form that shall be utilized, substantially in the form set forth in ORS 279C.370(2); and

(b) Provide instructions in a notice substantially similar to the following:

"Instructions for First-Tier Subcontractor Disclosure:

Bidders are required to disclose information about certain first-tier subcontractors (see ORS 279C.370). Specifically, when the Contract amount of a first-tier subcontractor furnishing labor or labor and materials would be greater than or equal to: (i) 5 percent of the project bid, but at least $15,000, or (ii) $350,000 regardless of the percentage, the bidder shall disclose the following information about that subcontract either in its bid submission, or within two hours after bid Closing:

(A) The subcontractor's name,

(B) The category of work that the subcontractor would be performing, and

(C) The dollar value of the subcontract.

If the bidder will not be using any subcontractors that are subject to the above disclosure requirements, the bidder is required to indicate "NONE" on the accompanying form.

THE DISTRICT SHALL REJECT A BID IF THE BIDDER FAILS TO SUBMIT THE DISCLOSURE FORM WITH THIS INFORMATION BY THE STATED DEADLINE (see PPS 49-0360)."

(4) Submission. A bidder shall submit the disclosure form required by this rule either in its bid submission or within two working hours after bid Closing in the manner specified by the ITB.

(5) Responsiveness. Compliance with the disclosure and submittal requirements of ORS 279C.370 and this rule is a matter of Responsiveness. Bids that are submitted by bid Closing, but for which the disclosure submittal has not been made by the specified deadline, are not Responsive and will not be considered for Contract award.

(6) District Role. The District shall obtain, and make available for public inspection, the disclosure forms required by ORS 279C.370 and this rule. The District shall also provide copies of disclosure forms to BOLI as required by ORS 279C.835. The District is not required to determine the accuracy or completeness of the information provided on disclosure forms.

(7) Substitution. Pursuant to ORS 279C.585, a Contractor whose bid is accepted may substitute a first-tier subcontractor that was not disclosed under ORS 279C.370 and this rule by submitting the name of the new subcontractor and the reason for the substitution in writing to the District. A Contractor may substitute a first-tier subcontractor under this section in the following circumstances:

(a) When the subcontractor disclosed under ORS 279C.370 fails or refuses to execute a written Contract after having had a reasonable opportunity to do so after the written Contract, which shall be reasonably based on the general terms, conditions, plans, and specifications for the Public Improvement project or the terms of the subcontractor's written bid, is presented to the subcontractor by the Contractor.

(b) When the disclosed subcontractor becomes bankrupt or insolvent.

(c) When the disclosed subcontractor fails or refuses to perform the subcontract.

(d) When the disclosed subcontractor fails or refuses to meet the bond requirements of the Contractor that had been identified prior to the bid submittal.

(e) When the Contractor demonstrates to the District that the subcontractor was disclosed as the result of an inadvertent clerical error.

(f) When the disclosed subcontractor does not hold a license from, or has a license that is not properly endorsed by, the Construction Contractors Board and is required to be licensed by the Construction Contractors Board.

(g) When the Contractor determines that the work performed by the disclosed subcontractor is substantially unsatisfactory and not in substantial accordance with the plans and specifications or that the subcontractor is substantially delaying or disrupting the progress of the work.

(h) When the disclosed subcontractor is ineligible to work on a Public Improvement Contract under applicable statutory provisions.

(i) When the substitution is for Good Cause. The Construction Contractors Board shall define "Good Cause" by rule. "Good cause" includes, but is not limited to, the financial instability of a subcontractor. The definition of "Good Cause" shall reflect the least-cost policy for Public Improvement Contracts established in ORS 279C.305.

(j) When the substitution is reasonably based on the Contract alternates chosen by the District.

The District shall accept written submissions filed under this section (7) as public records. Aside from issues involving inadvertent clerical error under ORS 279C.585, the District does not have a statutory role or duty to review, approve, or resolve disputes concerning such substitutions. See ORS 279C.590 regarding complaints to the Construction Contractors Board on improper substitution.

PPS 49-0370 Disqualification of Persons

(1) Authority. The District may disqualify a Person from consideration of award of the District's Contracts after providing the Person with notice and a reasonable opportunity to be heard in accordance with sections (2) and (4) of this rule.

(a) Standards for Conduct Disqualification. As provided in ORS 279C.440, the District may disqualify a Person for:

(A) Conviction for the commission of a criminal offense as an incident in obtaining or attempting to obtain a public or private contract or subcontract or in the performance of such Contract or subcontract.

(B) Conviction under state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty that currently, seriously, and directly affects the Person's responsibility as a contractor.

(C) Conviction under state or federal antitrust statutes.

(D) Violation of a Contract provision that is regarded by the District to be so serious as to justify disqualification. A violation under this section (1)(a)(D) may include, but is not limited to, material failure to perform the terms of a Contract or an unsatisfactory performance in accordance with the terms of the Contract. However, a Person's failure to

perform or unsatisfactory performance caused by acts beyond the Person's control is not a basis for disqualification.

(E) Failure to carry workers' compensation or unemployment insurance as required by statute.

(b) Standards for Disqualification. As provided in ORS 200.065, 200.075, or 279A.110, the District may disqualify a Person's right to submit an Offer or to participate in a Contract (e.g., subcontractors) as follows:

(A) For a Disqualification under ORS 200.065, the District may disqualify a Person upon finding that:

(i) The Person fraudulently obtained or retained or attempted to obtain or retain or aided another Person to fraudulently obtain or retain or attempt to obtain or retain certification as a disadvantaged business enterprise, minority-owned business, women owned business, emerging small business enterprise, or a veteran-owned business; or

(ii) The Person knowingly made a false claim that any Person is qualified for certification or is certified under ORS 200.055 for the purpose of gaining a Contract or subcontract or other benefit; or

(iii) The Person has been disqualified by another district under ORS 200.065.

(B) For a Disqualification under ORS 200.075, the District may disqualify a Person upon finding that:

(i) The Person has entered into an agreement representing that a disadvantaged business enterprise, minority-owned business, women-owned business, emerging small business enterprise, or a veteran-owned business, certified under ORS 200.055 ("Certified Enterprise"), will perform or supply materials under a Public Improvement Contract without the knowledge and consent of the Certified Enterprise; or

(ii) The Person exercises management and decision-making control over the internal operations, as defined by ORS 200.075(1)(b), of any Certified Enterprise; or

(iii) The Person uses a Certified Enterprise to perform services under a Contract or to provide supplies under a Public Improvement Contract to meet an established Certified Enterprise goal, and such enterprise does not perform a commercially useful function, as defined by ORS 200.075(3), in performing its obligations under the Contract.

(iv) If a Person is Disqualified for a Disqualification under ORS 200.075, the affected District shall not permit that Person to participate in that District's Contracts.

(C) For a Disqualification under ORS 279A.110, the District may disqualify a Person if the District finds that the Person discriminated against a disadvantaged business enterprise, minority-owned business, women-owned business, emerging small business enterprise, or a veteran-owned business, Contract with that District.

(2) Notice of Intent to Disqualify. The District shall notify the Person in writing of a proposed Disqualification personally or by registered or certified mail, return receipt requested. This notice shall:

(a) State that the District intends to disqualify the Person;

(b) Set forth the reasons for the Disqualification;

(c) Include a statement of the Person's right to a hearing if requested in writing within a time period established by the District and that if the District does not receive the Person's written request for a hearing within the time stated, the Person shall have waived its right to a hearing;

(d) Include a statement of the authority under which the hearing will be held;

(e) Include a reference to the particular sections of the statutes and rules involved;

(f) State the proposed disqualification period; and

(g) State that the Person may be represented by legal counsel.

(3) Hearing. The Superintendent will schedule a hearing upon the District's receipt of a timely hearing request. Within a reasonable time prior to the hearing, the Superintendent will notify the Person of the time and place of the hearing and provide information on hearing procedures, right to representation and other matters relating to the conduct of the hearing. Following the hearing, the Superintendent will make a decision on whether to disqualify the Person.

(4) Notice of Disqualification. The District shall notify the Person in writing of its Disqualification, personally or by registered or certified mail, return receipt requested. The notice shall contain:

(a) The effective date and period of Disqualification;

(b) The grounds for Disqualification; and

(c) A statement of the Person's appeal rights and applicable appeal deadlines as provided in section (5) of this rule.

(5) Appeal of Disqualification.

(a) Any Person who wishes to appeal a decision by the Superintendent to disqualify the Person under this section shall, within three business days after receipt of the notice of intent to Disqualify under section (4) of this rule, file written notice with the District that the Person appeals the decision. The District shall notify the Contract Review Board and schedule the appeal hearing before the Contract Review Board.

(b) Immediately upon receipt of the prospective bidder's or Proposer's notice of appeal, the District shall notify the appropriate Local Contract Review Board.

(c) Upon the receipt of notice from the District under section (2) of this rule, the Contract Review Board shall promptly notify the Person appealing and the District of the time and place of the hearing. The Contract Review Board shall conduct the hearing and decide the appeal within 30 days after receiving the notice from the District. The Contract Review Board shall set forth in writing the reasons for the hearing decision.

(d) At the hearing the Contract Review Board shall consider de novo the notice of disqualification, the reasons for disqualification set forth in section (1) of this rule on which the District based the disqualification, and any evidence provided by the parties. Hearings before a Contract Review Board shall be conducted under rules of procedure adopted by the Contract Review Board.

(e) The Contract Review Board may allocate the Contract Review Board's costs for the hearing between the Person appealing and the District. The allocation shall be based on facts found by the Contract Review Board and stated in the final order that, in the Contract Review Board's opinion, warrant such allocation of costs. If the final order does not allocate the costs for the hearing, the costs shall be paid as follows:

(A) If the decision to disqualify the Person is upheld, the costs shall be paid by the Person appealing the decision.

(B) If the decision to disqualify a Person is reversed, the costs shall be paid by the District.

(f) Judicial review of any decision by the Contract Review Board shall be as set forth in ORS 279C.450.

PPS 49-0380 Bid or Proposal Evaluation Criteria

(1) General. A Public Improvement Contract, if awarded, shall be awarded to the Responsible bidder submitting the lowest Responsive Bid, or to the Responsible Proposer submitting the best Responsive proposal. See PPS 49-0390 and rules for Alternative Contracting Methods at PPS 49-0600 to 49-0690.

(2) Bid Evaluation Criteria. Invitations to Bid may solicit lump-sum Offers, unit-price Offers, or a combination of the two.

(a) Lump Sum. If the ITB requires a lump-sum bid without additive or deductive alternates, or if the District elects not to award additive or deductive alternates, Bids shall be compared on the basis of lump-sum prices, or lump-sum base-bid prices, as applicable. If the ITB calls for a lump-sum base bid, plus additive or deductive alternates, the total bid price shall be calculated by adding to or deducting from the base bid those alternates selected by the District for the purpose of comparing Bids.

(b) Unit Price. If the bid includes unit pricing for estimated quantities, the total bid price shall be calculated by multiplying the estimated quantities by the unit prices submitted by the bidder, and adjusting for any additive or deductive alternates selected by the District for the purpose of comparing Bids. The District shall specify within the Solicitation Document the estimated quantity of the procurement to be used for determination of the low bidder. In the event of mathematical discrepancies between unit price and any extended price calculations submitted by the bidder, the unit price governs. See PPS 49-0350(2)(b).

(3) Proposal Evaluation Criteria. If the District has exempted the procurement of a Public Improvement from the competitive Bidding requirements of ORS 279C.335(1) and has directed the District to use an Alternative Contracting Method under ORS 279C.335(4), the District shall set forth the evaluation criteria in the Solicitation Documents. See PPS 49-0640, 49-0650, 49-0670, 049-0690, ORS 279C.335 and 279C.405.

PPS 49-0390 Offer Evaluation and Award; Determination of Responsibility

(1) General. If awarded, the District shall award the Contract to the Responsible bidder submitting the lowest Responsive Bid or the Responsible Proposer or Proposers submitting the best, Responsive proposal or Proposals, provided that such Person is not listed by the Construction Contractors Board as disqualified to hold a Public Improvement Contract (See ORS 279C.375(3)(a)) or is ineligible for award as a nonresident education service district (ORS 279C.325). The District may award by item, groups of items, or the entire Offer provided such award is consistent with the Solicitation Document and in the public interest. Where award is based on competitive Bids, ORS 279C.375(5) permits multiple Contract awards when specified in the ITB.

(2) Determination of Responsibility. Offerors are required to demonstrate their ability to perform satisfactorily under a Contract. Before awarding a Contract, the District shall have information that indicates that the Offeror meets the standards of responsibility set forth in ORS 279C.375(3)(b). To be a Responsible Offeror, the District shall determine that the Offeror:

(a) Has available the appropriate financial, material, equipment, facility, and personnel resources and expertise, or has the ability to obtain the resources and expertise, necessary to meet all Contractual responsibilities;

(b) Holds current licenses that businesses or service professionals operating in this state shall hold in order to undertake or perform the work specified in the Contract;

(c) Is covered by liability insurance and other insurance in amounts the District requires in the Solicitation Documents;

(d) Qualifies as a carrier-insured employer or a self-insured employer under ORS 656.407, or has elected coverage under ORS 656.128;

(e) Has made the disclosure required under ORS 279C.370.

(f) Has completed previous contracts of a similar nature with a satisfactory record of performance. For purposes of this subparagraph, a satisfactory record of performance means that to the extent that the costs associated with and time available to perform a previous contract remained within the bidder's control, the bidder stayed within the time and budget allotted for the procurement, and otherwise performed the contract in a satisfactory manner. The District should carefully scrutinize an Offeror's record of contract performance if the Offeror is or recently has been materially deficient in contract performance. In reviewing the Offeror's performance, the Contracting Agency should determine whether the Offeror's deficient performance was expressly excused under the terms of the contract, or whether the Offeror took appropriate corrective action. The District may review the Offeror's performance on both private and public contracts in determining the Offeror's record of contract performance. The District shall make its basis for determining an Offeror not Responsible under this paragraph part of the Solicitation file;

(g) Has a satisfactory record of integrity. An Offeror may lack integrity if the District determines the Offeror demonstrates a lack of business ethics such as violation of state environmental laws or false certifications made to a Contracting Agency. A Contracting Agency may find an Offeror not Responsible based on the lack of integrity of any Person having influence or control over the Offeror (such as a key employee of the Offeror that has the authority to significantly influence the Offeror's performance of the Contract or a parent company, predecessor or successor Person). The standards for Conduct Disqualification under PPS 49-0370 may be used to determine an Offeror's integrity. The District may find an Offeror non-responsible based on previous conviction id offenses related to obtaining or attempting to obtain a contract or subcontract or in connection with the Offeror's performance of a contract or subcontract. The District shall make its basis for determining that an Offeror is not responsible under this paragraph in the Solicitation file;

(h) Is legally qualified to contract with the District; and

(a) Has supplied all necessary information in connection with the inquiry concerning responsibility. If an Offeror fails to promptly supply information requested by the District concerning responsibility, the District shall determine the Offeror's responsibility based on any available information, or may find that the Offeror is not responsible.

(3) Documenting Agency Determinations. The District shall document its compliance with ORS 279C.375(3) and the above sections of this rule on a Responsibility Determination Form substantially as set forth in 279.375(3)(c), and file that form with the Construction Contractors Board within 30 days after Contract award.

(4) District Evaluation. The District shall evaluate an Offer only as set forth in the Solicitation Document and in accordance with applicable law. The District shall not evaluate an Offer using any other requirement or criterion.

(5) Offeror Submissions.

(a) The District may require an Offeror to submit Product Samples, Descriptive Literature, technical data, or other material, and may also require any of the following prior to award:

(A) Demonstration, inspection, or testing of a product for characteristics such as compatibility, quality, or workmanship;

(B) Examination of such elements as appearance or finish; or

(C) Other examinations to determine whether the product conforms to specifications.

(b) The District shall evaluate product acceptability only in accordance with the criteria disclosed in the Solicitation Document to determine that a product is acceptable. The District shall reject an Offer providing any product that does not meet the Solicitation Document requirements. The District's rejection of an Offer because it offers nonconforming Work or materials is not Disqualification and is not appealable under ORS 279C.445.

(6) Evaluation of Bids. The District shall use only objective criteria to evaluate Bids as set forth in the ITB. The District shall evaluate Bids to determine which Responsible Offeror Offers the lowest Responsive Bid.

(a) Nonresident bidders. In determining the lowest Responsive Bid, the District shall add a percentage increase to the Bid of a nonresident bidder equal to the percentage, if any, of the preference given to that bidder in the state in which the bidder resides.

(b) Clarifications. In evaluating Bids, the District may seek information from a bidder only to clarify the bidder's Bid. Such clarification shall not vary, contradict, or supplement the Bid. A bidder shall submit written and signed clarifications and such clarifications shall become part of the bidder's Bid.

(c) Negotiation Prohibited. The District shall not negotiate scope of work or other terms or conditions under an Invitation to Bid process prior to award.

(7) Evaluation of Proposals. See PPS 49-0650 regarding rules applicable to Requests for Proposals.

PPS 49-0395 Notice of Intent to Award

(1) Notice. At least seven days before the award of a Public Improvement Contract, the District shall issue to each bidder (pursuant to ORS 279C.375(2)) and each Proposer (pursuant to ORS 279C.410(7)), or post electronically or otherwise, a notice of the District's intent to award the Contract. This requirement does not apply to award of a Small or Intermediate (informal competitive quotes) Public Improvement Contract awarded under ORS 279C.335(1)(c) or (d).

(2) Form and Manner of Posting. The form and manner of posting notice shall conform to customary practices within the District's procurement system, and may be made electronically.

(3) Finalizing Award. The District's award shall not be final until the later of the following:

(a) Seven days after the date of the notice, unless the Solicitation Document provided a different period for protest; or

(b) The District provides a written response to all timely filed protests that denies each protest and affirms the award.

(4) Prior Notice Impractical. Posting of notice of intent to award shall not be required when the District determines that it is impractical due to unusual time constraints in making prompt award for its immediate procurement needs, documents the Solicitation file as to the reasons for that determination, and posts notice of that action as soon as reasonably practical.

PPS 49-0400 Documentation of Award; Availability of Award Decisions

(1) Basis of Award. After award, the District shall make a record showing the basis for determining the successful Offeror part of the District's Solicitation file.

(2) Contents of Award Record for Bids. The District's record shall include:

(a) All submitted Bids;

(b) Completed bid tabulation sheet; and

(c) Written justification for any rejection of lower Bids.

(3) Contents of Award Record for Proposals. Where the use of Requests for Proposals is authorized as set forth in PPS 49-0650, the District's record shall include:

(a) All submitted Proposals;

(b) The completed evaluation of the Proposals;

(c) Written justification for any rejection of higher-scoring Proposals or for failing to meet mandatory requirements of the Request for proposal; and

(d) If the District permitted negotiations in accordance with PPS 49-0650, the District's completed evaluation of the initial Proposals and the District's completed evaluation of final Proposals.

(4) Contract Document. The District shall deliver a fully executed copy of the final Contract to the successful Offeror.

(5) Bid Tabulations and Award Summaries. Upon request of any Person, the District shall provide tabulations of awarded Bids or evaluation summaries of Proposals for a nominal charge which may be payable in advance. Requests shall contain the Solicitation Document number and, if requested, be accompanied by a self-addressed, stamped envelope. The District may also provide tabulations of Bids and Proposals awarded on designated Web site or the District's Electronic Procurement System.

(6) Availability of Solicitation Files. The District shall make completed Solicitation files available for public review at the District.

(7) Copies from Solicitation Files. Any Person may obtain copies of material from Solicitation files upon payment of a reasonable copying charge.

PPS 49-0410 Time for District Acceptance; Extension

(1) Time for Offer Acceptance. An Offeror's bid, or proposal submitted as a Firm Offer (see PPS 49-0280), is irrevocable, valid, and binding on the Offeror for not less than 60 days from Closing unless otherwise specified in the Solicitation Document.

(2) Extension of Acceptance Time. The District may request, orally or in writing, that Offerors extend, in writing, the time during which the District may consider and accept their Offer(s). If an Offeror agrees to such extension, the Offer shall continue as a Firm Offer, irrevocable, valid, and binding on the Offeror for the agreed-upon extension period.

PPS 49-0420 Negotiation With Bidders Prohibited

(1) Bids. Except as permitted by ORS 279C.340 and PPS 49-0430 when all bids exceed the cost estimate, the District shall not negotiate with any bidder prior to Contract award. After award of the Contract, the District and the Contractor may only modify the resulting Contract by change order or amendment to the Contract in accordance with PPS 49-0910.

(2) Requests for Proposals. The District may only conduct discussions or negotiations with Proposers in accordance with the requirements of PPS 49-0650.

PPS 49-0430 Negotiation When Bids Exceed Cost Estimate

(1) Generally. In accordance with ORS 279C.340, if all Responsive Bids from Responsible bidders on a competitively bid project exceed the District's Cost Estimate, prior to Contract award the District

may negotiate Value Engineering and Other Options with the Responsible bidder submitting the lowest Responsive bid in an attempt to bring the project within the District's Cost Estimate. The subcontractor disclosure and substitution requirements of PPS 49-0360 do not apply to negotiations under this rule.

(2) Definitions. The following definitions apply to this rule:

(a) "Cost Estimate" means the District's most recent pre-bid, good faith assessment of anticipated Contract costs, consisting either of an estimate of an architect, engineer, or other qualified professional, or confidential cost calculation work sheets, where available, and otherwise consisting of formal planning or budgetary documents.

(b) "Other Options" means those items generally considered appropriate for negotiation in the RFP process, relating to the details of Contract performance as specified in PPS 49-0650, but excluding any material requirements previously announced in the Solicitation process that would likely affect the field of competition.

(c) "Project" means a Public Improvement.

(d) "Value Engineering" means the identification of alternative methods, materials, or systems which provide for comparable function at reduced initial or life-time cost. It includes proposed changes to the plans, specifications, or other Contract requirements that may be made, consistent with industry practice, under the original Contract by mutual agreement in order to take advantage of potential cost savings without impairing the essential functions or characteristics of the Public Improvement. Cost savings include those resulting from life cycle Costing, which may either increase or decrease absolute costs over varying time periods.

(3) Rejection of Bids. In determining whether all Responsive Bids from Responsible bidders exceed the Cost Estimate, only those Bids that have been formally rejected, or Bids from bidders who have been formally disqualified by the District, shall be excluded from consideration.

(4) Scope of Negotiations. The District shall not proceed with Contract award if the scope of the project is significantly changed from the original bid. The scope is considered to have been significantly changed if the pool of competition would likely have been affected by the change; that is, if other bidders would have been expected by the District to participate in the Bidding process had the change been made during the Solicitation process rather than during negotiation. This rule shall not be construed to prohibit re-solicitation of trade subcontracts.

(5) Discontinuing Negotiations. The District may discontinue negotiations at any time, and shall do so if it appears to the District that the apparent low bidder is not negotiating in good faith or fails to share cost and pricing information upon request. Failure to rebid any portion of the project, or to obtain subcontractor pricing information upon request, shall be considered a lack of good faith.

(6) Limitation. Negotiations may be undertaken only with the lowest Responsive, Responsible bidder pursuant to ORS 279C.340. That statute does not provide any additional authority to further negotiate with bidders next in line for Contract award.

(7) Public Records. To the extent that a bidder's records used in Contract negotiations under ORS 279C.340 are public records, they are exempt from disclosure until after the negotiated Contract has been awarded or the negotiation process has been terminated, at which time they are subject to disclosure pursuant to the provisions of the Oregon Public Records Law, ORS 192.311 through 192.478.

PPS 49-0440 Rejection of Offers

(1) Rejection of an Offer.

(a) The District may reject any Offer upon finding that to accept the Offer may impair the integrity of the procurement process or that rejecting the Offer is in the public interest.

(b) The District shall reject an Offer upon the District's finding that the Offer:

(A) Is contingent on the District's acceptance of terms and conditions (including specifications) that differ from the Solicitation Document,

(B) Takes exception to terms and conditions (including specifications),

(C) Attempts to prevent public disclosure of matters in contravention of the terms and conditions of the Solicitation Document or in contravention of applicable law;

(D) Offers Work that fails to meet the specifications of the Solicitation Documents;

(E) Is late; or

(F) Is not in substantial compliance with the Solicitation Document; or

(G) Is not in substantial compliance with all prescribed public solicitation procedures.

(c) The District shall reject an Offer upon the District's finding that the Offeror:

(A) Has not been prequalified under ORS 279C.430 and the District required mandatory prequalification;

(B) Has been Disqualified;

(C) Has been declared ineligible under ORS 279C.860 by the Commissioner of the Bureau of Labor and Industries and the Contract is for a Public Work;

(D) Is listed as not qualified by the Construction Contractors Board, if the Contract is for a Public Improvement;

(E) Has not met the requirements of ORS 279A.105 if required by the Solicitation Document;

(F) Has not submitted properly executed bid or proposal security as required by the Solicitation Document;

(G) Has failed to provide the certification required under section (3) of this rule; or

(H) Is not Responsible. See PPS 49-0390(2) regarding District determination that the Offeror has met statutory standards of responsibility.

(2) Form of Business. For purposes of this rule, the District may investigate any Person submitting an Offer. The investigation may include that Person's officers, directors, owners, affiliates, or any other Person acquiring ownership of the Person to determine application of this rule or to apply the Disqualification provisions of ORS 279C.440 to 279C.450 and PPS 49-0370.

(3) Certification of Non-Discrimination. The Offeror shall certify and deliver to the District written certification, as part of the Offer, that the Offeror has not discriminated and will not discriminate against any disadvantaged business enterprise, minority-owned business, women-owned business, emerging small business, or a veteran-owned business, in obtaining any required subcontracts. Failure to do so shall be grounds for disqualification.

(4) Contract and Subcontract Conditions. If the District awards a Contract to an Offeror that has been determined to be responsible under ORS 200.005(8)5 and 200.045(3),6 or awards a Contract under ORS 279A.100:7

(a) The District shall provide, as a material condition of the Contract:

(A) That the Contractor shall maintain its certification under ORS 200.055 throughout the term of the Contract and any extensions (if the Contracting Agency used the certification as a factor in or as a basis for the award of the Contract);

(B) That the Contractor shall promptly pay each subcontractor that is certified under ORS 200.055 in accordance with ORS 279B.220, or 279C.570 and ORS 279C.580, whichever apply to the Contract;

(C) That the Contractor shall include, in any subcontract the Contractor establishes in connection with the Contract, a provision that requires the subcontractor to maintain the subcontractor's certification under ORS 200.055 throughout the term of the subcontract and any extensions (if the Contractor used the certification as a factor in or as a basis for the award of the subcontract);

(D) That the District may require the Contractor to terminate a subcontract with a subcontractor that fails to maintain its certification under ORS 200.055 throughout the term of the subcontract and any extensions.

(b) In the administration of Contracts that are subject to section (4) of this rule, the District shall verify the Contractor's and any subcontractor's compliance with Subsection (4)(a) of this rule.

(c) Subparagraph (4)(a)(A) of this section does not apply to an emerging small business that ceases to qualify as a tier one firm or a tier two firm (as ORS 200.005 defines those terms) due to the growth in the business's number of full-time equivalent employees or in average annual gross receipts during the term of the Contract. This section (4) does not apply to an emerging small business for which a certification under ORS 200.055 expires during the term of the Contract or any extensions.

(5) **Rejection of All Offers**. The District may reject all Offers for Good Cause upon the District's written finding that it is in the public interest to do so. The District shall notify all Offerors of the rejection of all Offers, along with the good-cause justification and finding.

(6) **Criteria for Rejection of All Offers**. The District may reject all Offers upon a written finding that:

(a) The content of or an error in the Solicitation Document or the Solicitation process unnecessarily restricted competition for the Contract;

(b) The price, quality, or performance presented by the Offerors is too costly or of insufficient quality to justify acceptance of the Offer;

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[5] A bidder or proposer that the Governor's Policy Advisor for Economic and Business Equity determines has undertaken both a policy and a practice of actively pursuing participation by minority-owned businesses, women-owned businesses, businesses that veterans own or emerging small businesses in all of the bidder's or proposer's bids or proposals, both public and private.

[6] A bidder or proposer has made good faith efforts to encourage required participants to participate by taking all of the actions list in ORS 200.045(3).

[7] An affirmative action program adopted under ORS 279A.100 for goods and services contracts or any other contract under $50,000.

(c) Misconduct, error, or ambiguous or misleading provisions in the Solicitation Document threaten the fairness and integrity of the competitive process;

(d) Causes other than legitimate market forces threaten the integrity of the competitive procurement process. These causes include, but are not limited to, those that tend to limit competition such as restrictions on competition, collusion, corruption, unlawful anti-competitive conduct, and inadvertent or intentional errors in the Solicitation Document;

(e) The District cancels the Solicitation in accordance with PPS 49-0270; or

(f) Any other circumstance indicating that awarding the Contract would not be in the public interest.

PPS 49-0450 Protest of Contractor Selection, Contract Award

(1) Purpose. An adversely affected or aggrieved Offeror shall exhaust all avenues of administrative review and relief before seeking judicial review of the District's Contractor selection or Contract award decision.

(2) Notice of Competitive Range. Unless otherwise provided in the RFP, when the competitive proposal process is authorized under PPS 49-0650, the District shall provide written notice to all Proposers of the District's determination of the Proposers included in the competitive Range. The District's notice of the Proposers included in the competitive Range shall not be final until the later of the following:

(a) 10 days after the date of the notice, unless otherwise provided therein; or

(b) Until the District provides a written response to all timely filed protests that denies the protest and affirms the notice of the Proposers included in the competitive Range.

(3) Notice of Intent to Award. Unless otherwise provided in the Solicitation Document, the District shall provide written notice to all Offerors of the District's intent to award the Contract as provided in PPS 49-0395.

(4) Right to Protest Award.

(a) An adversely affected or aggrieved Offeror may submit to the District a written protest of the District's intent to award within seven days after issuance of the notice of intent to award the Contract, unless a different protest period is provided under the Solicitation Document.

(b) The Offeror's protest shall be in writing and shall specify the grounds on which the protest is based.

(c) An Offeror is adversely affected or aggrieved only if the Offeror is eligible for award of the Contract as the Responsible bidder submitting the lowest Responsive bid or the Responsible Proposer submitting the best Responsive proposal and is next in line for award, i.e., the protesting Offeror shall claim that all lower bidders or higher-scored Proposers are ineligible for award:

(A) Because their Offers were nonresponsive; or

(B) The District committed a substantial violation of a provision in the Solicitation Document or of an applicable procurement statute or administrative rule, and the protesting Offeror was unfairly evaluated and would have, but for such substantial violation, been the Responsible bidder offering the lowest bid or the Responsible Proposer offering the highest ranked proposal.

(d) The District shall not consider a protest submitted after the time period established in this rule or such different period as may be provided in the Solicitation Document. A Proposer may

not protest the District's decision not to increase the size of the competitive Range above the size of the competitive Range set forth in the RFP.

(5) Right to Protest Competitive Range.

(a) An adversely affected or aggrieved Proposer may submit to the District a written protest of the District's decision to exclude the Proposer from the competitive Range within seven days after issuance of the notice of the competitive Range, unless a different protest period is provided under the Solicitation Document. (See procedural requirements for the use of RFPs at PPS 49-0650.)

(b) The Proposer's protest shall be in writing and shall specify the grounds on which the protest is based.

(c) A Proposer is adversely affected only if the Proposer is responsible and submitted a Responsive proposal and is eligible for inclusion in the competitive Range, i.e., the protesting Proposer shall claim it is eligible for inclusion in the competitive Range if all ineligible higher-scoring Proposers are removed from consideration, and that those ineligible Proposers are ineligible for inclusion in the competitive Range because:

(A) Their Proposals were not Responsive; or

(B) The District committed a substantial violation of a provision in the RFP or of an applicable procurement statute or administrative rule, and the protesting Proposer was unfairly evaluated and would have, but for such substantial violation, been included in the competitive Range.

(d) The District shall not consider a protest submitted after the time period established in this rule or such different period as may be provided in the Solicitation Document. A Proposer may not protest the District's decision not to increase the size of the competitive Range above the size of the competitive Range set forth in the RFP.

(6) Authority to Resolve Protests. The Superintendent may settle or resolve a written protest submitted in accordance with the requirements of this rule.

(7) Decision. If a protest is not settled, the Superintendent, or such Person's designee, shall promptly issue a written decision on the protest. Judicial review of this decision will be available if provided by statute.

(8) Award. The successful Offeror shall promptly execute the Contract after the award is final. The District shall execute the Contract only after it has obtained all applicable required documents and approvals.

PPS 49-0460 Performance and Payment Security; Waiver

(1) Public Improvement Contracts. Unless the required performance bond is waived under ORS 279C.380(1)(a) or this rule, excused in cases of emergency under ORS 279C.380(4), or unless the District exempts a Contract or classes of Contracts from the required performance bond and payment bond pursuant to ORS 279C.390, the Contractor shall execute and deliver to the District a performance bond and a payment bond each in a sum equal to the Contract Price for all Public Improvement Contracts. This requirement applies only to Public Improvement Contracts with a value, estimated by the District, of more than $100,000 or, in the case of Contracts for highways, bridges and other transportation projects, more than $50,000. See 279C.380(5). Also see OAR 137-049-0815 and BOLI rules at 839-025-0015 regarding the separate requirement for a Public Works bond.

(2) Other Construction Contracts. The District may require performance security for other construction Contracts that are not Public Improvement Contracts. Such requirements shall be expressly set forth in the Solicitation Document.

(3) Requirement for Surety Bond. The District shall accept only a performance bond furnished by a surety company authorized to do business in Oregon unless otherwise specified in the Solicitation Document (i.e., the District may accept a cashier's check or certified check in lieu of all or a portion of the required performance bond if specified in the Solicitation Document). The payment bond shall be furnished by a surety company authorized to do business in Oregon, and in an amount equal to the full Contract Price.

(4) Time for Submission. The apparent successful Offeror shall promptly furnish the required performance security at the District's request. If the Offeror fails to furnish the performance security as requested, the District may reject the Offer and award the Contract to the Responsible bidder with the next lowest Responsive bid or the Responsible Proposer with the next highest-scoring Responsive proposal, and, at the District's discretion, the Offeror shall forfeit its bid or proposal security.

PPS 49-0470 Substitute Contractor

If the Contractor provided a performance bond, the District may afford the Contractor's surety the opportunity to provide a substitute contractor to complete performance of the Contract. A substitute contractor shall perform all remaining Contract Work and comply with all terms and conditions of the Contract, including the provisions of the performance bond and the payment bond. Such substitute performance does not involve the award of a new Contract and shall not be subject to the competitive procurement provisions of ORS 279C.

PPS 49-0490 Foreign Contractor

If the Contract Price exceeds $10,000 and the Contractor is a Foreign Contractor, the Contractor shall promptly report to the Oregon Department of Revenue on forms provided by the Department of Revenue, the Contract Price, terms of payment, Contract duration, and such other information as the Department of Revenue may require before final payment can be made on the Contract. A copy of the report shall be forwarded to the District. The District shall satisfy itself that the above requirements have been complied with before it issues final payment on the Contract.

ALTERNATIVE CONTRACTING METHODS

PPS 49-0600 Alternative Contracting Methods; Purpose

These PPS 49-0600 to PPS 49-0690 rules are intended to provide guidance to the District regarding the use of Alternative Contracting Methods for Public Improvement Contracts, as may be directed by the Contract Review Board under ORS 279C.335. These Alternative Contracting Methods include, but are not limited to, the following forms of contracting: Design-Build, Energy Savings Performance, and the Construction Manager/General Contractor Method. To the extent any such Alternative Contracting Methods are utilized within the competitive bidding process set forth in ORS 279C.335(1), these OAR 137-049-0600 to 137-049-0690 rules are advisory only and may be used or referred to by the District in whole, in part or not at all, within the discretion of the District. As to ESPC contracting, these PPS 49-0600 through PPS 49-0690 rules implement the requirements of ORS 279C.335 pertaining to the adoption of Model Rules appropriate for use by the entire District to govern the procedures for entering into ESPCs. As to contracting for Construction Manager General Contractor services, requiring an exemption from competitive bidding under ORS 279C.335(2), PPS 49-0600 to 49-0690 include mandatory and optional provisions pertaining to the procurement of Construction Manager/General Contractor services, pursuant to the requirements of ORS 279C.337.

PPS 49-0610 Definitions for Alternative Contracting Methods

The following definitions shall apply to rules PPS 49-0600 to 49-0690, unless the context requires otherwise:

(1) Affiliate has the meaning set forth in ORS 279C.332(1).

(2) Alternative Contracting Methods mean innovative techniques for procuring or performing Public Improvement Contracts, utilizing processes other than the traditional methods involved in the design-bid-build construction contracting method (with award of a Public Improvement Contract based solely on price, in which a final design is issued with formal bid documents, construction services are obtained by sealed bid awarded to the Responsible bidder submitting the lowest Responsive bid, and the project is built in accordance with those documents). In industry practice, such methods commonly include variations of Design-Build contracting, CM/GC forms of contracting, and ESPCs, which are specifically addressed in these PPS 49-0600 to 49-0690 rules. These methods also include other developing techniques which include but are not limited to general "performance contracting," "cost-plus-time " contracting, (as more particularly described in ORS 279C.332(3)(b)(D)(iii)(I)) and "qualifications plus project approach" contracting (as more particularly described in ORS 279C.332(3)(b)(D)(iii)(II)). Procedural requirements for these methods are identified in these PPS 49-0600 to 49-0690 rules when the District uses an Alternative Contracting Method in a procurement that requires an exemption from competitive bidding under ORS 279C.335(2) or in an ESPC procurement that is excepted from competitive bidding under ORS 279.335(1).

(3) Construction Manager/General Contractor (or **"CM/GC"**) has the meaning set forth in ORS 279C.332(2).

(4) Construction Manager/General Contractor Method (or **"CM/GC Method"**) means the Alternative Contracting Method which involves a District's selection of a CM/GC to perform CM/GC services for a project or projects.

(5) Construction Manager/General Contractor Services (or **"CM/GC Services"**) has the meaning set forth in ORS 279C.332(3).

(6) Design-Build means a form of procurement that results in a Public Improvement Contract in which the construction Contractor also provides or obtains specified design services, participates on the project team with the District, and manages both design and construction. In this form of Contract, a single Person provides the District with all of the Personal services and construction Work necessary to both design and construct the project.

(7) Early Work means construction services, construction materials and other Work authorized by the parties to be performed under the CM/GC Contract in advance of the establishment of the GMP, fixed price or other maximum, not-to-exceed price for the project. Permissible Early Work shall be limited to early procurement of materials and supplies, early release of bid or proposal packages for site development and related activities, and any other advance Work related to important components of the project for which performance prior to establishment of the GMP will materially and positively affect the development or completion of the project.

(8) Energy Conservation Measures (or "ECMs") (also known as **"energy efficiency measures"**) means, as used in ESPC procurement, any equipment, fixture, or furnishing to be added to or used in an existing building or structure, and any repair, alteration, or improvement to an existing building or structure that is designed to reduce energy consumption and related costs, including those costs related to electrical energy, thermal energy, water consumption, waste disposal, and future contract-labor costs and materials costs associated with maintenance of the building or structure. For purposes of these PPS 49-0600 to 49-0690 rules, use of either or both of the terms "building" or "structure" shall be deemed to include existing energy, water, and waste disposal systems connected or related to or otherwise used for the building or structure when such system(s) are included in the project, either as part of the project together with the building or structure, or when such system(s) are the focus of the project. Maintenance services are not Energy Conservation Measures for purposes of these PPS 49-0600 to 49-0690 rules.

(9) Energy Savings Guarantee means the energy savings and performance guarantee provided by the ESCO under an ESPC procurement, which guarantees to the District that certain energy savings and

performance will be achieved for the project covered by the RFP through the installation and implementation of the agreed-upon ECMs for the project. The Energy Savings Guarantee shall include, but shall not be limited to, the specific energy savings and performance levels and amounts that will be guaranteed, provisions related to the financial remedies available to the District in the event the guaranteed savings and performance are not achieved, the specific conditions under which the ESCO will guarantee energy savings and performance (including the specific responsibilities of the District after final completion of the design and construction phase), and the term of the energy savings and performance guarantee.

(10) Energy Savings Performance Contract (or "ESPC") means a Public Improvement Contract between the District and a Qualified Energy service Company for the identification, evaluation, recommendation, design, and construction of Energy Conservation Measures, including a Design-Build Contract, that guarantee energy savings or performance.

(11) General Conditions Work (or "GC Work") means a general grouping of project Work required to support construction operations on the project that is not included within the Contractor's overhead or fee.

(12) Guaranteed Maximum Price (or "GMP") has the meaning set forth in ORS 279C.332(4), pertaining to procurements for CM/GC services. For Alternative Contracting Methods other than the CM/GC Method, "Guaranteed Maximum Price" or "GMP" means the total maximum price provided to the District by the Contractor, and accepted by the District, that includes all reimbursable costs of and fees for completion of the Contract Work, and any particularly identified contingency amounts as defined by the Public Improvement Contract.

(13) Measurement and Verification (or "M & V") means, as used in ESPC procurement, the examination of installed ECMs using the International Performance Measurement and Verification Protocol ("IPMVP"), or any other comparable protocol or process, to monitor and verify the operation of energy-using systems pre-installation and post-installation.

(14) Project Development Plan means a secondary phase of Personal services and Work performed by an ESCO in an ESPC procurement when the ESCO performs more extensive design of the agreed-upon ECMs for the project, provides the detailed provisions of the ESCO's Energy Savings Guarantee that the fully installed and commissioned ECMs will achieve a particular energy savings level for the building or structure, and prepares an overall report or plan summarizing the ESCO's services during this secondary phase of the work and otherwise explaining how the agreed-upon ECMs will be implemented during the design and construction phase of the work. The term "project development plan" can also refer to the report or plan provided by the ESCO at the conclusion of this phase of the work.

(15) Qualified Energy Service Company (or "ESCO") means, as used in ESPC procurement, a company, firm, or other legal Person with the following characteristics: demonstrated technical, operational, financial, and managerial capabilities to design, install, construct, commission, manage, measure and verify, and otherwise implement Energy Conservation Measures and other Work on building systems or building components that are directly related to the ECMs in existing buildings and structures; a prior record of successfully performing ESPCs on projects involving existing buildings and structures that are comparable to the project under consideration by the District; and the financial strength to effectively guarantee energy savings and performance under the ESPC for the project in question, or the ability to secure necessary financial measures to effectively guarantee energy savings under an ESPC for that project.

(16) Savings has the meaning set forth in ORS 279C.337(4), pertaining to CM/GC services procurements. For other Alternative Contracting Methods, "Savings" means a positive difference between a Guaranteed Maximum Price or other maximum not-to-exceed price set forth in a Public Improvement Contract and the actual cost of the Contractor's performance of the Contract Work payable

by the District under the terms of the Contract, including costs for which the District reimburses a Contractor and fees, profits or other payments the Contractor earns.

(17) Technical Energy Audit, means, as used in ESPC procurement, the initial phase of services to be performed by an ESCO that includes a detailed evaluation of an existing building or structure, an evaluation of the potential ECMs that could be effectively utilized at the facility, and preparation of a report to the District of the ESCO's findings during this initial phase of the work. The term "Technical Energy Audit" can also refer to the report provided by the ESCO at the conclusion of this phase of the work.

PPS 49-0620 Use of Alternative Contracting Methods

(1) Competitive Bidding Exemptions. ORS 279C requires a competitive bidding process for Public Improvement Contracts unless a statutory exception applies, a class of Contracts has been exempted from the competitive bidding process, or an individual Contract has been exempted from the competitive bidding process in accordance with 279C.335 and any applicable District rules. Use of Alternative Contracting Methods may be directed by the District if that use is within the competitive bidding process if feasible, or through an available statutory exception to the competitive bidding process. Use of Alternative Contracting Methods shall be directed through the District's Local Contract Review Board, however, when use of the Alternative Contracting Method requires an exemption to the prescribed competitive bidding requirement of ORS 279C.335. In any of these circumstances, use of Alternative Contracting Methods shall be justified in accordance with any applicable Code and District requirements and, if require, these PPS 049-0600 to 049-0690 rules. See PPS 49-0630 regarding required findings and restrictions on exemptions from the competitive bidding requirements under ORS 279C.335.

(2) Energy Savings Performance Contracts. ESPCs are excepted from the competitive Bidding requirements for Public Improvement Contracts pursuant to ORS 279C.335(1)(f) if the District complies with the procedures set forth in these PPS 49-0600 through 49-0690 or parallel administrative rules meeting the requirements of ORS 279A.065 related to the Solicitation, rules related to the solicitation, negotiation and contracting for ESPC Work. If those procedures are not followed, an ESPC procurement may still be exempted from competitive bidding requirements by following the general exemption procedures within ORS 279C.335.

(3) Post-Project Evaluation. ORS 279C.355 requires that the District prepare a formal post-project evaluation of Public Improvement projects in excess of $100,000 when the District does not use the competitive bidding process required by ORS 279C.335. The purpose of this evaluation is to determine whether it was actually in the District's best interest to use an Alternative Contracting Method outside the competitive bidding process. The evaluation shall be delivered to the Contract Review Board of the District as applicable within 30 days of the date the District "accepts" the Public Improvement project, which event is typically defined in the Contract. In the absence of such definition, acceptance of the project occurs on the later of the date of final payment or the date of final completion of the Contract Work. ORS 279C.355 describes the timing and content of this evaluation, with three required elements:

- **(a)** Financial information, consisting of cost estimates, any GMP changes, and actual costs;
- **(b)** A narrative description of successes and failures during design, engineering, and construction; and
- **(c)** An objective assessment of the use of the Alternative Contracting Method as compared to the exemption findings.

PPS 49-0630 Findings, Notice, and Hearing

(1) Cost Savings and Other Substantial Benefits Factors. When findings are required under ORS 279C.335 to exempt a Contract or class of Contracts from the competitive Bidding requirements, the "substantial cost savings" and "other substantial benefits "criteria at ORS 279C.335(2)(b) require

consideration of the type, cost, the amount of the Contract and, to the extent applicable, the other factors set forth in 279C.335(2)(b). If a particular factor has no application whatsoever to the particular Public Improvement Contract or class of Public Improvement Contracts, the District Local Contract Review Board does not need to consider that factor, and the District is not required to address the factor, other than to explain why the factor has no application whatsoever to the particular Public Improvement Contract or class of Public Improvement Contracts.

(2) Required Information. The statutory definition of "findings" at ORS 279C.330(2) which applies to exemptions from competitive bidding means the justification for the District's conclusion regarding the factors listed in both ORS 279C.335(2)(a) and 279C.335(2)(b) or, in the alternative, both ORS 279C.335(2)(a) and 279C.335(2)(c).

(3) Addressing Cost Savings. Accordingly, when the Contract or class of Contracts under consideration for an exemption contemplates the use of Alternative Contracting Methods, the "substantial cost savings and other substantial benefits" requirement may be addressed by a combination of:

(a) Specified findings that address the factors and other information specifically identified by statute, including, but not limited to, an analysis or reasonable forecast of present and future cost savings and other substantial benefits; and

(b) Additional findings that address industry practices, surveys, trends, past experiences, evaluations of completed projects required by ORS 279C.355, and related information regarding the expected benefits and drawbacks of particular Alternative Contracting Methods. To the extent practicable, such findings shall relate back to the specific characteristics of the project or projects at issue in the exemption request; and

(c) As an alternative to the "substantial cost savings and other substantial benefits" requirement in ORS 279C.335(2)(b), if an Alternative Contracting Method has not been previously used, the District may make a finding that identifies the project as a "pilot project" under ORS 279C.335(2)(c). Nevertheless, the District shall still make the findings required in ORS 279C.335(2)(a).

(4) Favoritism and Competition. The criteria at ORS 279C.335(2)(a) that the exemption "is unlikely to encourage favoritism" or "substantially diminish competition" may be addressed in contemplating the use of Alternative Contracting Methods by specifying the manner in which an RFP process will be utilized, that the procurement will be formally advertised with public notice and disclosure of the planned Alternative Contracting Method, competition will be encouraged, award will be made based upon identified selection criteria, and an opportunity will be given to protest that award.

(5) Descriptions. findings supporting a competitive bidding exemption shall describe with specificity any Alternative Contracting Method to be used in lieu of competitive bidding, including, but not limited to, whether a one-step (Request for proposal), two-step (beginning with a Request for Qualification, followed by a Request for proposal) or other solicitation process will be utilized. The findings may also describe anticipated characteristics or features of the resulting Public Improvement Contract. However, the purpose of an exemption from competitive bidding is limited to a determination of the procurement method. Any unnecessary or incidental descriptions of the specific details of the anticipated Contract within the supporting findings are not binding upon the District. The parameters of the Public Improvement Contract are those characteristics or specifics that are announced in the Solicitation Document.

(6) Class Exemptions. In making the findings supporting a class exemption, the District shall clearly identify the class with respect to its defining characteristics, pursuant to the requirements of ORS 279C.335(3). The class shall meet the following requirements:

(a) The class cannot be based on a single characteristic or factor, so that an Agency directly or indirectly creates a class whereby the Agency uses, for example, the CM/GC Method for all Agency construction projects or all Agency construction projects over a particular dollar amount, unidentified future Agency construction projects of a particular work category, or all Agency construction projects from a particular funding source such as the sale of bonds; and

(b) The class shall include a combination of factors, be defined by the Agency through characteristics that reasonably relate to the exemption criteria set forth in ORS 279C.335(2) and shall reflect a detailed evaluation of those characteristics so that the class is defined in a limited way that effectively meets the Agency's objectives while allowing for impartial and open competition, and protecting the integrity of the exemption process. An example of a class that might be permitted under the statute is a series of projects, such as a specific group of building renovation projects, that:

(A) involve renovations for a common purpose;

(B) require completion on a related schedule in order to avoid unnecessary disruption of District operations;

(C) share common characteristics, such as historic building considerations, the presence of asbestos or other hazardous substances, or the presence of agency staff during construction;

(D) otherwise possess characteristics that meet the requirements of ORS 279C.335(2); and

(E) otherwise meet the requirements of the Director of the District Local Contract Review Board.

(7) Public Hearing. Before final adoption of findings exempting a Public Improvement Contract from the requirement of competitive Bidding, the District shall give notice and provide interested with the opportunity to request a public hearing as required by ORS 279C.335(5). The notice must state that, in response to a written request, the District will hold a public hearing for the purpose of taking comments on the draft Findings for an exemption from the competitive bidding requirement. If the District does not receive a written request from an interested party to hold a public hearing, the District may hold a public hearing, but is not required to hold a public hearing. If a hearing is requested, the District will hold a public hearing for the purpose of receiving public comment on the District's draft findings.

PPS 49-0640 Competitive Proposals; Procedure

The District may utilize the following RFP process for Public Improvement Contracts, allowing flexibility in both proposal evaluation and Contract negotiation, only in accordance with ORS 279C.330 to 279C.337, ORS 279C.400 through 279C.410 and PPS 49-0600 through 49-0690, unless other applicable statutes control the District's use of competitive Proposals for Public Improvement Contracts. Also see the section of rules in this division entitled Formal procurement rules, PPS 49-0200 through 49-0450, and RFP-related rules under the Alternative Contracting Methods section at PPS 49-0640 through 49-0660. For ESPCs, the following RFP process as further specified in PPS 049-0645, 049-0650, 049-0660 and 049-0680 shall be utilized if the District desires the procurement process to be exempt from the competitive Bidding requirements of ORS 279C.335. The RFP process for the Alternative Contracting Methods identified in PPS 49-0600 through 49-0690 includes the following steps:

(1) Proposal Evaluation. Factors in addition to price may be considered in the selection process, but only as set forth in the RFP. proposal evaluation shall be as objective as possible. Evaluation factors need not be precise predictors of future costs and performance, but to the extent possible such evaluation factors shall:

(a) Be reasonable estimates based on information available to the District;

(b) Treat all Proposals equitably; and

(c) Recognize that public policy requires that Public Improvements be constructed at the least overall cost to the District. See ORS 279C.305.

For ESPC proposal evaluations, the District may provide in the RFP that qualifications-based evaluation factors will outweigh the District's consideration of price-related factors, due to the fact that prices for the major components of the work to be performed during the ESPC process contemplated by the RFP will likely not be determinable at the time of proposal evaluation. For CM/GC services proposal evaluations, the District shall comply with ORS 279C.337.

(2) Evaluation Factors.

(a) In basic negotiated construction contracting where the only reason for an RFP is to consider factors other than price, those factors may consist of firm and personnel experience on similar projects, adequacy of equipment and physical plant, sources of supply, availability of key personnel, financial capacity, past performance, safety records, project understanding, proposed methods of construction, proposed milestone dates, references, service, and related matters that could affect the cost or quality of the work.

(b) In CM/GC contracting, in addition to subsection (a) above, those factors may also include the ability to respond to the technical complexity or unique character of the project, analyze and propose solutions or approaches to complex project problems, analyze and propose value engineering options, analyze and propose energy efficiency measures or alternative energy options, coordinate multiple disciplines on the project, effectively utilize the time available to commence and complete the improvement, and related matters that could affect the cost or quality of the work.

(c) In Design-Build contracting, in addition to subsections (a) and (b) above, those factors may also include design professional qualifications, specialized experience, preliminary design submittals, technical merit, design-builder team experience, and related matters that could affect cost or quality of the work.

(d) In ESPC contracting, in addition to the factors set forth in subsections (a), (b), and (c) above, those factors may also include sample Technical Energy Audits from similar projects, sample M & V reports, financial statements and related information of the ESCO for a time period established in the RFP, financial statements and related information of joint ventures comprising the ESCO, the ESCO's capabilities and experience in performing energy baseline studies for facilities (independently or in cooperation with an independent third-party energy baseline consultant), past performance of the ESCO in meeting energy guarantee contract levels, the specific Person that will provide the Energy Savings Guarantee to be offered by the ESCO, the ESCO's management plan for the project, information on the specific methods, techniques, and equipment that the ESCO will use in the performance of the work under the ESPC, the ESCO's team members and consultants to be assigned to the project, the ESCO's experience in the energy savings performance contracting field, the ESCO's experience acting as the prime contractor on previous ESPC projects (as opposed to a subcontractor or consultant to a prime ESCO), the ESCO's vendor and product neutrality related to the development of ECMs, the ESCO's project history related to removal from an ESPC project or the inability or unwillingness of the ESCO to complete an ESPC project, the ESCO's M & V capabilities and experience (independently or in cooperation with an independent third-party M & V consultant), the ESCO's ability to explain the unique risks associated with ESPC projects and the assignment of risk in the particular project between the District and the ESCO, the ESCO's equipment performance guarantee policies and procedures, the ESCO's energy savings and cost savings guarantee policies and procedures, the ESCO's project cost guarantee policies and procedures, the ESCO's pricing methodologies, the price that the ESCO

will charge for the Technical Energy Audit phase of the work, and the ESCO's fee structure for all phases of the ESPC project.

(3) Contract Negotiations. Contract terms may be negotiated to the extent allowed by the RFP and PPS 49-0600 through PPS 49-0690, provided that the general Work scope remains the same and that the field of competition does not change as a result of material changes to the requirements stated in the Solicitation Document. See PPS 49-0650. Terms that may be negotiated consist of details of Contract performance; methods of construction, timing, and assignment of risk in specified areas; fee; and other matters that could affect the cost or quality of the work. For the CM/GC Method, terms that may be negotiated also include the specific scope of pre-construction services, the GC Work, any Early Work and other construction Work to be performed by the CM/GC, and any other terms that the District has identified as being subject to negotiation, consistent with the requirements of OAR 137-049-0690. In ESPC contracting, terms that may be negotiated also include the scope of preliminary design of ECMs to be evaluated by the parties during the Technical Energy Audit phase of the work, the scope of services to be performed by the ESCO during the project Development Plan phase of the work, the detailed provisions of the Energy Savings Guarantee to be provided by the ESCO, and scope of work, methodologies, and compensation terms and conditions during the design and construction phase and M & V phase of the work, consistent with the requirements of PPS 49-0680.

PPS 49-0645 Requests for Qualifications ("RFQ")

As provided by ORS 279C.405(1), the District may utilize a Request for Qualifications, (RFQ) to obtain information useful in the preparation or distribution of a Request for Proposals (RFPs). When using an RFQ as the first step in a two-step solicitation process in which distribution of the RFPs will be limited to the firms identified as most qualified through their submitted statements of qualification, the District shall first advertise and provide notice of the RFQ in the same manner in which RFPs are advertised, specifically stating that RFPs will be distributed only to the firms selected in the RFQ process. In such cases, the District shall also provide within the RFQ a protest provision substantially in the form of PPS 49-0450(5) regarding protests of the competitive Range. Thereafter, the District may distribute RFPs to the selected firms without further advertisement of the Solicitation.

PPS 49-0650 Requests for Proposals ("RFP")

(1) Generally. The use of competitive Proposals shall be specially authorized for a Public Improvement Contract under the competitive Bidding exception and exemption requirements of ORS 279C.335, PPS 49-0130, and PPS 49-0600 through 49-0690. Also see ORS 279C.337 and ORS 279C.400 to 279C.410 for statutory requirements regarding competitive Proposals, and PPS 49-0640 regarding competitive proposal procedures.

(2) Solicitation Documents. In addition to the Solicitation Document requirements of PPS 49-0200, this rule applies to the requirements for RFPs. RFP Solicitation Documents shall conform to the following standards:

(a) The District shall set forth selection criteria in the Solicitation Document. Examples of evaluation criteria include price or cost, quality of a product or service, past performance, management, capability, personnel qualification, prior experience, compatibility, reliability, operating efficiency, expansion potential, experience of key personnel, adequacy of equipment or physical plant, financial wherewithal, sources of supply, references, and warranty provisions. See PPS 49-0640 regarding proposal evaluation and evaluation factors. Evaluation factors need not be precise predictors of actual future costs and performance, but to the extent possible, such factors shall be reasonable estimates based on information available to the District. Subject to 279(C).410(4), the Solicitation Document may provide for discussions with Proposers to be conducted for the purpose of proposal evaluation prior to award or prior to establishing any competitive Range;

(b) When the District is willing to negotiate terms and conditions of the Contract or allow submission of revised Proposals following discussions, the District shall identify the specific terms and conditions in or provisions of the Solicitation Document that are subject to negotiation or discussion and authorize Offerors to propose certain alternative terms and conditions in lieu of the terms and conditions the District has identified as authorized for negotiation. The District shall describe the evaluation, discussion, and negotiation process, including how the District shall establish the competitive Range, if any;

(c) The anticipated size of any competitive Range shall be stated in the Solicitation Document but may be decreased if the number of Proposers that submit responsive Proposals is less than the specified number, or may be decreased as provided in PPS 49-0650(4)(a).

(d) When the District intends to award Contracts to more than one Proposer, the District shall identify in the Solicitation Document the manner in which it will determine the number of Contracts it will award. The District shall also include the criteria it will use to determine how the District shall endeavor to achieve optimal value, utility, and substantial fairness when selecting a particular Contractor to provide Personal services or Work from those Contractors awarded Contracts.

(3) Evaluation of Proposals.

(a) Evaluation. The District shall evaluate Proposals only in accordance with criteria set forth in the RFP and applicable law. The District shall evaluate Proposals to determine the Responsible Proposer or Proposers submitting the best Responsive proposal or Proposals.

(A) Clarifications. In evaluating Proposals, the District may seek information from a Proposer to clarify the Proposer's proposal. A Proposer shall submit written and signed clarifications and such clarifications shall become part of the Proposer's proposal.

(B) Limited Negotiation. If the District did not permit negotiation in its Request for proposal, the District may, nonetheless, negotiate with the highest ranked Proposer, but may then only negotiate the:

(i) Statement of work; and

(ii) Contract Price as it is affected by negotiating the statement of work.

The process for discussions or negotiations that is outlined and explained in Sections (5)(b) and (6) of this rule does not apply to this limited negotiation.

(b) Discussions; Negotiations. If the District permitted discussions or negotiations in the Request for proposal, the District shall evaluate Proposals and establish the competitive Range, and may then conduct discussions and negotiations in accordance with this rule.

(A) If the Solicitation Document provided that discussions or negotiations may occur at the District's discretion, the District may forego discussions and negotiations and evaluate all Proposals in accordance with this rule.

(B) If the District proceeds with discussions or negotiations, the District shall establish a negotiation team tailored for the acquisition. The District's team may include legal, technical, auditing, and negotiating personnel.

(c) Cancellation. Nothing in this rule shall restrict or prohibit the District from canceling the Solicitation at any time.

(4) Competitive Range; Protest; Award.

(a) Determining Competitive Range.

(A) If the District does not cancel the Solicitation, after the Opening the District shall evaluate all Proposals in accordance with the evaluation criteria set forth in the RFP. After evaluation of all Proposals in accordance with the criteria set forth in the RFP, the District shall rank the Proposers based on the District's scoring and determine the competitive Range.

(B) The District may increase the number of Proposers in the competitive Range if the District's evaluation of Proposals establishes a natural break in the scores of Proposers indicating a number of Proposers greater than the initial competitive Range are closely competitive or have a reasonable chance of being determined the best Proposer after the District's evaluation of revised Proposals submitted in accordance with the process described in this rule.

(b) Protesting Competitive Range. The District shall provide written notice to all Proposers identifying Proposers in the competitive Range. A Proposer that is not within the competitive Range may protest the District's evaluation and determination of the competitive Range in accordance with PPS 49-0450.

(c) Intent to award; Discuss or Negotiate. After the protest period provided in accordance with these rules expires, or after the District has provided a final response to any protest, whichever date is later, the District may either:

(A) Provide written notice to all Proposers in the competitive Range of its intent to award the Contract to the highest ranked Proposer in the competitive Range.

(i) An unsuccessful Proposer may protest the District's intent to award in accordance with PPS 49-0450.

(ii) After the protest period provided in accordance with PPS 49-0450 expires, or after the District has provided a final response to any protest, whichever date is later, the District shall commence final Contract negotiations with the highest ranked Proposer in the competitive Range; or

(B) Engage in discussions with Proposers in the competitive Range and accept revised Proposals from them, and, following such discussions and receipt and evaluation of revised Proposals, conduct negotiations with the Proposers in the competitive Range.

(5) Discussions; Revised Proposals. If the District chooses to enter into discussions with and receive revised Proposals from the Proposers in the competitive Range, the District shall proceed as follows:

(a) Initiating Discussions. The District shall initiate oral or written discussions with all of the Proposers in the competitive Range regarding their Proposals with respect to the provisions of the RFP that the District identified in the RFP as the subject of discussions. The District may conduct discussions for the following purposes:

(A) Informing Proposers of deficiencies in their initial Proposals;

(B) Notifying Proposers of parts of their Proposals for which the District would like additional information; and

(C) Otherwise allowing Proposers to develop revised Proposals that will allow the District to obtain the best proposal based on the requirements and evaluation criteria set forth in the RFP.

(b) Conducting Discussions. The District may conduct discussions with each Proposer in the competitive Range necessary to fulfill the purposes of this section, but need not conduct the same amount of discussions with each Proposer. The District may terminate discussions with any Proposer in the competitive Range at any time. The District shall, however, offer all Proposers in the competitive Range the opportunity to discuss their Proposals with the District before the District notifies Proposers of the date and time pursuant to this section that revised Proposals will be due.

(A) In conducting discussions, the District:

(i) Shall treat all Proposers fairly and shall not favor any Proposer over another;

(ii) Shall not discuss other Proposers' Proposals;

(iii) Shall not suggest specific revisions that a Proposer should make to its proposal, and shall not otherwise direct the Proposer to make any specific revisions to its proposal.

(B) At any time during the time allowed for discussions, the District may:

(i) Continue discussions with a particular Proposer;

(ii) Terminate discussions with a particular Proposer and continue discussions with other Proposers in the competitive Range; or

(iii) Conclude discussions with all remaining Proposers in the competitive Range and provide notice to the Proposers in the competitive Range to submit revised Proposals.

(c) Revised Proposals. If the District does not cancel the Solicitation at the conclusion of the District's discussions with all remaining Proposers in the competitive Range, the District shall give all remaining Proposers in the competitive Range notice of the date and time by which they shall submit revised Proposals. This notice constitutes the District's termination of discussions, and Proposers shall submit revised Proposals by the date and time set forth in the District's notice.

(A) Upon receipt of the revised Proposals, the District shall evaluate the revised Proposals based on the evaluation criteria set forth in the RFP and rank the revised Proposals based on the District's scoring.

(B) The District may conduct discussions with and accept only one revised proposal from each Proposer in the competitive Range unless otherwise set forth in the RFP.

(d) Intent to Award; Protest. The District shall provide written notice to all Proposers in the competitive Range of the District's intent to award the Contract. An unsuccessful Proposer may protest the District's intent to award in accordance with PPS 49-0450. After the protest period provided in accordance with that rule expires, or after the District has provided a final response to any protest, whichever date is later, the District shall commence final Contract negotiations.

(6) Negotiation.

(a) Initiating Negotiations. The District may determine to commence negotiations with the highest ranked Proposer in the competitive Range following the:

(A) Initial determination of the competitive Range; or

(B) Conclusion of discussions with all Proposers in the competitive Range and evaluation of revised Proposals.

(b) Conducting Negotiations

(A) Scope: The District may negotiate:

(i) The statement of work;

(ii) The Contract Price as it is affected by negotiating the statement of work; and

(iii) Any other terms and conditions reasonably related to those expressly authorized for negotiation in the RFP. Accordingly, Proposers shall not submit, and the District shall not accept, for negotiation any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP.

(c) Continuing Negotiations. If the District terminates negotiations with a Proposer, the District may then commence negotiations with the next highest-scoring Proposer in the competitive Range, and continue the process described in this rule until the District has:

(A) Determined to award the Contract to the Proposer with whom it is currently negotiating; or

(B) Completed one round of negotiations with all Proposers in the competitive Range, unless the District provided for more than one round of discussions or negotiations in the Request for proposal, in which case the District may proceed with any authorized further rounds of negotiations.

(7) Terminating Discussions or Negotiations. At any time during discussions or negotiations conducted in accordance with this rule, the District may terminate discussions or negotiations with the Proposer with whom it is currently conducting discussions or negotiations if the District reasonably believes that:

(a) The Proposer is not discussing or negotiating in good faith; or

(b) Further discussions or negotiations with the Proposer will not result in the parties agreeing to the terms and conditions of a final Contract in a timely manner.

PPS 49-0660 RFP Pricing Mechanisms

(1) An RFP may result in a Contract with a lump-sum Contract Price or a fixed Contract Price, as in the case of competitive Bidding. Alternatively, a Request for proposal may result in a cost reimbursement Contract with a GMP or some other maximum price specified in the Contract.

(2) Economic incentives or disincentives may be included to reflect stated District purposes related to time of completion, safety, or other Public Contracting objectives, including but not limited to total least-cost mechanisms such as life cycle Costing.

(3) A Guaranteed Maximum Price may be used as the pricing mechanism for CM/GC services Contracts where a total Contract Price is provided in the design phase in order to assist the District in determining whether the project scope is within the District's budget and allowing for design changes during preliminary design rather than after final design services have been completed.

(a) If the collaborative process described above in this section (3) is successful, the Contractor shall propose a final GMP, which may be accepted by the District and included within the Contract.

(b) If the collaborative process described above in this section (3) is not successful and no mutually agreeable resolution on the GMP for the project construction Work can be achieved with the Contractor, then the District shall terminate the Contract. The District may then proceed to negotiate a new Contract (and GMP) with the Proposer that was next-ranked in the original selection process, or employ other means for continuing the project under ORS 279C.

(4) When Cost Reimbursement Contracts are utilized, regardless of whether a GMP is included, the District shall provide for audit controls that will effectively verify rates and ensure that costs are reasonable, allowable, and properly allocated.

PPS 49-0670 Design-Build Contracts

(1) General. The Design-Build form of contracting, as defined at PPS 49-0610(3), has technical complexities that are not readily apparent. The District shall use this contracting method only with the assistance of knowledgeable staff or Consultants who are experienced in its use. In order to use the Design-Build process, the District shall be able to reasonably anticipate the following types of benefits:

(a) Obtaining, through a Design-Build team, engineering design, plan preparation, value engineering, construction engineering, construction, quality control, and required documentation as a fully integrated function with a single point of responsibility;

(b) Integrating value engineering suggestions into the design phase, as the construction Contractor joins the project team early with design responsibilities under a team approach, with the potential of reducing Contract changes;

(c) Reducing the risk of design flaws, misunderstandings, and conflicts inherent in construction Contractors building from designs in which they have had no opportunity for input, with the potential of reducing Contract claims;

(d) Shortening project time as construction activity (early submittals, mobilization, subcontracting, and advance Work) commences prior to completion of a "Biddable" design, or where a design solution is still required (as in complex or phased projects); or

(e) Obtaining innovative design solutions through the collaboration of the Contractor and design team, which would not otherwise be possible if the Contractor had not yet been selected.

(2) Authority. The District shall utilize the Design-Build form of contracting only in accordance with the requirements of these PPS 49-0600 through 49-0690 rules. See particularly PPS 49-0620 pertaining to Alternative Contracting Methods and PPS 49-0680 pertaining to ESPCs.

(3) Selection. Design-Build selection criteria may include those factors set forth above in PPS 49-0640(2)(a), (b), and (c).

(4) QBS Inapplicable. Because the value of construction services predominates the Design-Build form of Contracting, the qualifications-based selection ("QBS") process mandated by ORS 279C.110 for the District in certain circumstances in obtaining certain Consultant services is not applicable.

(5) Licensing. If a Design-Build Contractor is not an Oregon-licensed design professional, the District shall require that the Design-Build Contractor disclose in its written Offer that it is not an Oregon-licensed design professional, and identify the Oregon-licensed design professional(s) who will provide design services. See ORS 671.030(5) regarding the offer of Architectural services, and ORS 672.060(11) regarding the offer of Engineering services that are appurtenant to construction services.

(6) Performance Security. ORS 279C.380(1)(a) provides that for Design-Build Contracts, the surety's obligation on performance bonds, or the bidder's obligation on cashier's or certified checks accepted in lieu thereof, includes the preparation and completion of design and related professional services specified in the Contract. This additional obligation, beyond performance of construction services, extends only to the provision of professional services and related design revisions, corrective Work, and associated costs prior to final completion of the Contract (or for such longer time as may be defined in the Contract). The obligation is not intended to be a substitute for professional liability insurance, and does not include errors and omissions or latent defects coverage.

(7) Contract Requirements. The District shall conform their Design-Build contracting practices to the following requirements:

(a) Design Services. The level or type of design services required shall be clearly defined within the procurement documents and Contract, along with a description of the level or type of design services previously performed for the project. The services to be performed shall be clearly delineated as either design specifications or performance standards, and performance measurements shall be identified.

(b) Professional Liability. The Contract shall clearly identify the liability of design professionals with respect to the Design-Build Contractor and the District, as well as requirements for professional liability insurance.

(c) Risk Allocation. The Contract shall clearly identify the extent to which the District requires an express indemnification from the Design-Build Contractor for any failure to perform, including professional errors and omissions, design warranties, construction operations, and faulty Work claims.

(d) Warranties. The Contract shall clearly identify any express warranties made to the District regarding characteristics or capabilities of the completed project (regardless of whether errors occur as the result of improper design, construction, or both), including any warranty that a design will be produced that meets the stated project performance and budget guidelines.

(e) Incentives. The Contract shall clearly identify any economic incentives and disincentives, the specific criteria that apply, and their relationship to other financial elements of the Contract.

(f) Honoraria. If allowed by the RFP, honoraria or stipends may be provided for early design submittals from qualified finalists during the Solicitation process on the basis that the District is benefited from such deliverables.

PPS 49-0680 Energy Savings Performance Contracts

(1) Generally. These PPS 49-0600 through PPS 49-0690 rules include a limited, efficient method for the District to enter into ESPCs outside the competitive Bidding requirements of ORS 279C.335 for existing buildings or structures, but not for new construction. If the District chooses not to utilize the ESPC procurement method provided for by these PPS 49-0600 through 49-0690 rules, the District may still enter into an ESPC by complying with the competitive Bidding exemption process set forth in ORS 279C.335, or by otherwise complying with the procurement requirements applicable to any district not subject to all the requirements of ORS 279C.335.

(2) ESPC Contracting Method. The ESPC form of contracting, as defined at PPS 49-0610(6), has unique technical complexities associated with the determination of what ECMs are feasible for the District, as well as the additional technical complexities associated with a Design-Build Contract. The District shall only utilize the ESPC contracting method with the assistance of knowledgeable staff or Consultants who are experienced in its use. In order to utilize the ESPC contracting process, the District shall be able to reasonably anticipate one or more of the following types of benefits:

(a) Obtaining, through an ESCO, the following types of integrated Personal services and Work: facility profiling, energy baseline studies, ECMs, Technical Energy Audits, project development planning, engineering design, plan preparation, cost estimating, life cycle Costing, construction administration, project management, construction, quality control, operations and maintenance staff training, commissioning services, M & V services, and required documentation as a fully integrated function with a single point of responsibility;

(b) Obtaining, through an ESCO, an Energy Savings Guarantee;

(c) Integrating the Technical Energy Audit phase and the project Development Plan phase into the design and construction phase of work on the project;

(d) Reducing the risk of design flaws, misunderstandings, and conflicts inherent in the construction process, through the integration of ESPC Personal services and Work;

(e) Obtaining innovative design solutions through the collaboration of the members of the ESCO integrated ESPC team;

(f) Integrating cost-effective ECMs into an existing building or structure so that the ECMs pay for themselves through savings realized over the useful life of the ECMs;

(g) Preliminary design, development, implementation, and an Energy Savings Guarantee of ECMs into an existing building or structure through an ESPC as a distinct part of a major remodel of that building or structure that is being performed under a separate remodeling Contract; and

(h) Satisfying local energy efficiency design criteria or requirements.

(3) Authority. The District desiring to pursue an exemption from the competitive Bidding requirements of ORS 279C.335 (and, if applicable, ORS 351.086) shall utilize the ESPC form of contracting only in accordance with the requirements of these PPS 49-0600 to 49-0690 rules.

(4) No Findings Required. The District is only required to comply with the ESPC contracting procedures set forth in PPS 49-0600 through 49-0690 of these rules in order for the ESPC to be exempt from the competitive Bidding processes of ORS 279C.335. No findings are required for an ESPC to be exempt from the competitive Bidding process for Public Improvement Contracts pursuant to ORS 279C.335, unless the District is subject to the requirements of ORS 279C.335 and chooses not to comply with the ESPC contracting procedures set forth in these PPS 49-0600 through 49-0690 rules.

(5) Selection. ESPC selection criteria may include those factors set forth above in PPS 49-0640(2)(a), (b), (c), and (d). Since the Energy Savings Guarantee is such a fundamental component in the ESPC contracting process, Proposers shall disclose in their Proposals the identity of any Person providing (directly or indirectly) any Energy Savings Guarantee that may be offered by the successful ESCO during the course of the performance of the ESPC, along with any financial statements and related information pertaining to any such Person.

(6) Qualifications Based Selection (QBS). Because the value of construction services predominates in the ESPC method of contracting, the QBS process mandated by ORS 279C.110 for the State Contracting Agencies in obtaining certain Consultant services is not applicable.

(7) Licensing. If the ESCO is not an Oregon-licensed design professional, the District shall require that the ESCO disclose in the ESPC that it is not an Oregon-licensed design professional, and identify the Oregon-licensed design professional(s) who will provide design services. See ORS 671.030(5) regarding the offer of architectural services, and ORS 672.060(11) regarding the offer of engineering services that are appurtenant to construction Work.

(8) Performance Security. At the point in the ESPC when the parties enter into a binding Contract that constitutes a Design-Build Contract, the ESCO shall provide a performance bond and a payment bond, each for 100 percent of the full Contract Price, including the construction and design and related professional services specified in the ESPC Design-Build Contract, pursuant to ORS 279C.380(1)(a). For ESPC Design-Build Contracts, these "design and related professional services" include conventional design services, commissioning services, training services for the District's operations and maintenance staff, and any similar professional services provided by the ESCO under the ESPC Design-Build Contract prior to final completion of construction. M & V services, and any Personal services and Work associated with the ESCO's Energy Savings Guarantee, are not included in these ORS 279C.380(1)(a) "design and related professional services." Nevertheless, the District may require that the ESCO provide performance security for M & V services and any services associated with the ESCO's Energy Savings Guarantee, if the District so provides in the RFP.

(9) Contracting Requirements. The District shall conform their ESPC contracting practices to the following requirements:

(a) General ESPC Contracting Practices. An ESPC involves a multi-phase project, which includes the following contractual elements:

(A) A contractual structure which includes general Contract terms describing the relationship of the parties, the various phases of the work, the contractual terms governing the Technical Energy Audit for the project, the contractual terms governing the project Development Plan for the project, the contractual terms governing the final design and construction of the project, the contractual terms governing the performance of the M & V services for the project, and the detailed provisions of the ESCO's Energy Savings Guarantee for the project.

(B) The various phases of the ESCO's Work will include the following:

(i) The Technical Energy Audit phase of the work;

(ii) The project Development Plan phase of the work;

(iii) A third phase of the work that constitutes a Design-Build Contract, during which the ESCO completes any plans and specifications required to implement the ECMs that have been agreed to by the parties to the ESPC, and the ESCO performs all construction, commissioning, construction administration, and related Personal services and Work to actually construct the project; and

(iv) A final phase of the work whereby the ESCO, independently or in cooperation with an independent Consultant hired by the District, performs M & V services to ensure that the Energy Savings Guarantee identified by the ESCO in the earlier phases of the work and agreed to by the parties has actually been achieved.

(b) Design-Build Contracting Requirements in ESPCs. At the point in the ESPC when the parties enter into a binding Contract that constitutes a Design-Build Contract, the District shall conform its Design-Build contracting practices to the Design-Build contracting requirements set forth in PPS 49-0670(7).

(c) Pricing Alternatives. The District may utilize one of the following pricing alternatives in an ESPC:

(A) A fixed price for each phase of the Personal services and Work to be provided by the ESCO;

(B) A cost reimbursement pricing mechanism, with a maximum not-to-exceed price or a GMP; or

(C) A combination of a fixed fee for certain components of the Personal services to be performed, a cost reimbursement pricing mechanism for the construction Work to be performed with a GMP, a single or annual fixed fee for M & V services to be performed for an identified time period after final completion of the construction Work, and a single or annual Energy Savings Guarantee fixed fee payable for an identified time period after final completion of the construction Work that is conditioned on certain energy savings being achieved at the facility by the ECMs that have been implemented by the ESCO during the project (in the event an annual M & V services fee and annual Energy Savings Guarantee fee is utilized by the parties, the parties may provide in the Design-Build Contract that, at the sole option of the District, the ESCO's M & V services may be terminated prior to the completion of the M & V/Energy Savings Guarantee period and

the District's future obligation to pay the M & V services fee and Energy Savings Guarantee fee will likewise be terminated, under terms agreed to by the parties).

(d) Permitted ESPC Scope of Work. The scope of work under the ESPC is restricted to implementation and installation of ECMs, as well as other Work on building systems or building components that are directly related to the ECMs, and that, as an integrated unit, will completely pay for themselves or substantially pay for themselves over the useful life of the ECMs installed. The permitted scope of work for ESPCs resulting from a solicitation under these PPS 49-0600 through PPS 49-0690 rules does not include maintenance services for the project facility.

PPS 49-0690 Construction Manager/General Contractor Services ("CM/GC Services")

(1) General. The CM/GC Method is a technically complex project delivery system. The District shall use this contracting method only with 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 a 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. Unlike the Design-Build form of contracting, the CM/GC Method does not contemplate a "single point of responsibility" under which the CM/GC is responsible for successful completion of all Work related to a performance specification. The CM/GC has defined Contract obligations, including responsibilities as part of the project team along with the District and design professional, although with the CM/GC Method there is a separate contract between the District and design professional. In order to utilize the CM/GC Method, the District shall be able to reasonably anticipate the following types of benefits:

(a) Time Savings. With the CM/GC Method, the Public Improvement has significant schedule ramifications, such that concurrent design and construction are necessary in order to meet critical deadlines and shorten the overall duration of construction. The District may consider operational and financial data that show significant savings or increased opportunities for generating revenue as a result of early completion, as well as less disruption to public facilities as a result of shortened construction periods;

(b) Cost Savings. With the CM/GC Method, early CM/GC input during the design process is expected to contribute to significant cost savings. The District may consider value engineering, building systems analysis, life cycle Costing analysis, and construction planning that lead to cost savings. The District shall specify any special factors influencing this analysis, including high rates of inflation, market uncertainty due to material and labor fluctuations or scarcities, and the need for specialized construction expertise due to technical challenges; or

(c) Technical Complexity. With the CM/GC Method, the Public Improvement presents significant technical complexities that are best addressed by a collaborative or team effort between the District, design professionals, any District project management or technical consultants and the CM/GC, in which the CM/GC will assist in addressing specific project challenges through preconstruction services. The District may consider the need for CM/GC input on issues such as operation of the facility during construction, tenant occupancy, public safety, delivery of an early budget or GMP, financing, historic preservation, difficult remodeling projects, and projects requiring complex phasing or highly coordinated scheduling.

(2) Authority. The District shall use the CM/GC form of contracting only in accordance with the requirements of these division 49 rules and ORS 279C.337, when a competitive bidding exemption is

approved. See particularly PPS 49-0600 on "Purpose" and PPS 49-0620 on "Use of Alternative Contracting Methods."

(3) Selection. CM/GC selection criteria may include those factors set forth in PPS 49-0640(2)(b).

(4) Basis for Payment. The CM/GC process adds specified construction manager Personal services to traditional design-bid-build general contractor Work, requiring full Contract performance within a negotiated GMP, fixed Contract Price or other maximum Contract Price. For a GMP pricing method, the basis for payment is reimbursable direct costs as defined under the Contract, plus a fee constituting full payment for construction Work and Personal services rendered, which together shall not exceed the GMP. See GMP definition at PPS 49-0610(7) and pricing mechanisms at PPS 49-0660.

(5) Contract Requirements. The District shall conform their CM/GC contracting practices to the following requirements:

(a) Nature of the Initial CM/GC Services Contract Document. A solicitation for CM/GC services is a procurement for a Public Improvement, since the scope of the procurement includes not only pre-construction Personal services to be performed by the CM/GC, but also construction Work that is expected to result in a completed Public Improvement. In the traditional CM/GC services contracting approach, the text of the resulting CM/GC services Contract will include comprehensive contract provisions that will not only fully govern the relationship between the District and the CM/GC for the pre-construction Personal services, but will also include the general contract provisions that will control the CM/GC's providing of the construction Work necessary to complete the project (with any remaining necessary construction-related contract provisions being added through Early Work amendments to the Contract, the GMP amendment to the Contract or, if necessary, a conventional amendment to the Contract). The traditional CM/GC services contracting approach, however, also contemplates that the District shall only authorize the CM/GC to perform the preconstruction Personal services when the Contract is first executed unless construction Work is specifically included in the initial CM/GC Contract. Under this approach, the construction phase or phases of the CM/GC services project are not yet authorized and the Contract only becomes a Public Improvement Contract once the parties amend the Contract, through an Early Work or a GMP amendment, to authorize the construction of a portion of the project or the entire project. See also OAR 839-025-0020, regarding the Bureau of Labor and Industries' determination of when a Contract for CM/GC services becomes a "public works" Contract for purposes of paying prevailing wage rates for construction Work under the CM/GC Contract.

(b) Setting the GMP, Fixed Contract Price or Other Maximum Contract Price. The GMP fixed Contract price or other maximum Contract Price shall be set at an identified time consistent with industry practice and project conditions and after supporting information reasonably considered necessary to its use has been developed, which will normally take place at the end of the design development phase of the project. The supporting information for the GMP shall define both what Personal services and construction Work are included and excluded from the GMP, fixed Contract price or other maximum Contract Price. A set of project drawings and specifications shall be produced establishing the scope of construction Work contemplated by the GMP fixed Contract price or other maximum Contract Price.

(c) Adjustments to the GMP Fixed Contract Price or Other Maximum Contract Price. The Contract shall clearly identify the standards or factors under which changes or additional construction Work will be considered outside of the Work scope other warrants an increase in the GMP, fixed Contract Price or other maximum Contract Price, as well as criteria for decreasing the GMP, fixed Contract Price or other maximum Contract Price. The GMP, fixed Contract Price or other maximum Contract Price shall not be increased without a concomitant increase to the scope of the work defined at the establishment of the GMP, fixed Contract

Price or other maximum Contract Price or most recent amendment to the GMP, fixed Contract Price or other maximum Contract Price. An increase to the scope of the work may take the form of conventional additions to the project scope, as well as corrections to the Contract terms and conditions, additions to insurance coverage required by the District and other changes to the work.

(d) Cost Savings. The Contract shall clearly identify the disposition of any Cost Savings resulting from completion of the work below the GMP; fixed Contract price or other maximum Contract price, that is, under what circumstances, if any, the CM/GC might share in those Cost Savings, or whether the Cost Savings accrue only to the District's benefit. Unless there is a clearly articulated reason for sharing the Cost Savings set forth in the Contract, the Cost Savings shall accrue to the District.

(e) Cost Reimbursement. The Contract shall clearly identify what items or categories of items are eligible for cost reimbursement within the GMP or other maximum Contract Price, including any category of GC Work, and may also incorporate a mutually agreeable cost-reimbursement standard.

(f) Audit. Cost reimbursements shall be made subject to final audit adjustment, and the Contract shall establish an audit process to ensure that Contract costs are allowable, properly allocated, and reasonable.

(g) Fee. Compensation for the CM/GC's Personal services and construction Work, where the Contract uses a GMP, shall include a fee that is inclusive of profit, overhead, and all other indirect or non-reimbursable costs. Costs determined to be included within the fee shall be expressly defined in the Contract terms and conditions at the time the District selects the GM/GC. The fee, which may be expressed as either a fixed dollar amount or as a proposed percentage of all reimbursable costs, shall be identified during and become an element of the selection process. It shall subsequently be expressed as a fixed amount for particular construction Work authorized to be performed, when Early Work is added to the Contract through an amendment and when the GMP is established. The CM/GC fee does not include any fee paid to the CM/GC for performing pre-construction services during a separate pre-construction phase.

(h) Incentives. The Contract shall clearly identify any economic incentives, the specific criteria that apply, and their relationship to other financial elements of the Contract (including the GMP, fixed Contract Price or other maximum Contract Price).

(i) Controlled Insurance Programs. For projects where an owner-controlled or contractor-controlled insurance program is permitted under ORS 737.602, the Contract shall clearly identify whether an owner-controlled or contractor-controlled insurance program is anticipated or allowable. If so, the Contract shall clearly identify (1) anticipated cost savings from reduced premiums, claims reductions, and other factors, (2) the allocation of cost savings, and (3) safety responsibilities, incentives or both safety responsibilities and incentives.

(j) Early Work. The RFP shall clearly identify, whenever feasible, the circumstances under which any Early Work may be authorized and undertaken for compensation prior to establishing the GMP, fixed Contract price, or other maximum Contract Price.

(k) Subcontractor Selection. Subcontracts under the Contract are not Public Contracts within the meaning of the Code. However, the Contract shall include provisions that clearly meet the requirements of ORS 279C.337(3) and other District requirements. Within the scope of ORS 279C.337(3), the CM/GC's subcontractor selection process shall meet the following parameters:

(A) Absent a written justification prepared by the CM/GC and approved by the District as more particularly provided for in this section, the CM/GC's Subcontractor selection process shall be "competitive," meaning that the process should include publicly-advertised subcontractor solicitations and be based on a low-bid competitive method, a low-quote competitive method for contracts in a specified dollar range agreeable to the District, or a method whereby both price and qualifications of the subcontractors are evaluated in a competitive environment, consistent with the RFP and Contract requirements;

(B) When the Subcontractor selection process for a particular Work package will not be "competitive" as provided for in this section, the process shall meet the following requirements:

(i) The CM/GC shall prepare and submit a written justification to the District, explaining the project circumstances that support a non-competitive Subcontractor selection process for a particular Work package, including, but not limited to, Emergency circumstances, the CM/GC's need to utilize a key Subcontractor member of the CM/GC's project team consistent with the CM/GC's project proposal, the need to meet other specified Contract requirements, the continuation or expansion of an existing Subcontractor agreement that was awarded through a competitive process along with facts supporting the continuation or expansion of the Subcontractor agreement, or a sole source justification;

(ii) For a sole source selection of a subcontractor to proceed, the District shall evaluate the written justification provided by the CM/GC and shall find that critical project efficiencies require utilization of labor, services or materials from one subcontractor; that technical compatibility issues on the project require labor, services or materials from one subcontractor; that particular labor, services or materials are needed as part of an experimental or pilot project or as part of an experimental or pilot aspect of the project; or that other project circumstances exist to support the conclusion that the labor, services or materials are available from only one subcontractor;

(iii) The CM/GC shall provide an independent cost estimate for the work package that will be subject to the non-competitive process, if required by the District;

(iv) The CM/GC shall fully respond to any questions or comments submitted to the CM/GC by the District; and

(v) The District shall approve the CM/GC's use of the non-competitive Subcontractor selection process prior to the CM/GC's pursuit of the non-competitive process.

(C) A competitive selection process may be preceded by a publicly advertised sub-contractor pre-qualification process, with only those subcontractors meeting the pre-qualification requirements being invited to participate in the later competitive process through which the CM/GC will select the subcontractor to perform the construction Work described in the selection process;

(D) If the CM/GC or an Affiliate or subsidiary of the CM/GC will be included in the subcontractor selection process to perform particular construction Work on the project, the CM/GC shall disclose that fact in the selection process documents and announcements. The Contract shall also identify the conditions, processes and procedures the CM/GC will utilize in that competitive process in order to make the process impartial, competitive and fair, including but not limited to objective,

independent review and opening of bids or proposals for the elements of work involved, by a representative of the District or another independent third party.

(l) Subcontractor Approvals and Protests. The Contract shall clearly establish whether the District shall approve subcontract awards, and to what extent, if any, the District shall resolve or be involved in the resolution of protests of the CM/GC's selection of subcontractors and suppliers. The procedures and reporting mechanisms related to the resolution of subcontractor and suppler protests shall be established in the Contract with certainty, including the CM/GC's roles and responsibilities in this process and whether the CM/GC's subcontracting records are considered to be public records. In any event, the District shall retain the right to monitor the subcontracting process in order to protect the District's interests and to confirm the CM/GC's compliance with the Contract and with applicable statutes, administrative rules and other legal requirements.

(m) CM/GC Self-Performance or Performance by CM/GC Affiliates or Subsidiaries Without Competition. Consistent with the requirements of ORS 279C.337(3)(c), the Contract shall establish the conditions under which the CM/GC or an Affiliate or subsidiary of the CM/GC may perform elements of the construction Work without competition from subcontractors, including, for example, job-site GC Work. Other than for GC Work, in order for the CM/GC or an Affiliate or subsidiary of the CM/GC to perform elements of the construction Work without competition from subcontractors, the CM/GC shall provide, or shall have included in the CM/GC's RFP proposal to perform CM/GC services for the project, a detailed proposal for performance of the work by the CM/GC or an Affiliate or subsidiary of the CM/GC. If required by the District, the CM/GC's proposal to perform the construction Work shall be supported by at least one independent cost estimate prior to the work being included in the Contract.

(n) Unsuccessful Subcontractor Briefing. ORS 279C.337(3)(e) is designed to allow a subcontractor who was not selected by the CM/GC to perform a particular element of the construction Work to obtain specific information from the CM/GC, and meet with the CM/GC to discuss the subcontractor qualification and selection process involved and the CM/GC's subcontractor selection decisions, in order to better understand why the subcontractor was not successful in being selected to perform the particular element of the work and to improve the subcontractor's substantive qualifications or the subcontractor's methods in competing for elements of the work for the particular project involved, or for future projects. The briefing meetings may be held with individual subcontractors or, if the subcontractors agree, in groups of subcontractors, with those groups established by bid package or other designation agreed to by the contracting agency and the CM/GC. Nevertheless, the CM/GC is not obligated to provide this briefing opportunity unless the CM/GC receives a written request from a subcontractor to discuss the subcontractor qualification and selection process involved. Unless the District and the CM/GC agree on a different schedule, the CM/GC Contract should include provisions:

(A) Allowing a subcontractor 60 days from the CM/GC's notice of award of a subcontract for a particular Work package to request, in writing, a post-selection meeting with the CM/GC under this section; and

(B) Requiring the CM/GC to set a meeting with the subcontractor under this section within 45 days of the subcontractor's written request.

(o) Performance and Payment Bonds. Provided no construction Work is included with the preconstruction services to be performed under the initial form of the CM/GC Contract, no performance bond or payment bond is required to be provided by the CM/GC at the time of Contract signing, consistent with ORS 279C.380. Once construction Work is included in the

Contract and authorized by the District to be performed by the CM/GC, however, the CM/GC shall provide a performance bond and payment bond each in the full amount of any Early Work to be performed by the CM/GC, or the full amount of the GMP, fixed Contract price or other maximum Contract Price, as applicable. Furthermore, in the event additional Early Work is added to the CM/GC Contract after the initial Early Work or in the event an amendment to the CM/GC Contract is made so that the GMP, fixed price or other maximum contract price shall be increased, the performance bond and the payment bond shall each be increased in an amount equal to the additional Early Work or the increased GMP, fixed price or other maximum contract price.

(p) Independent Review of CM/GC Performance; Conflicts of Interest. If the District requires independent review, monitoring, inspection or other oversight of a CM/GC's performance of pre-construction Personal services, construction Work or both pre-construction Personal services and construction Work, the District shall obtain those independent review services from a Contractor independent of the CM/GC, the CM/GC's Affiliates and the CM/GC's Subcontractors, pursuant to the requirements of ORS 279C.307. However, ORS 279C.307 does not prohibit the following:

(A) The CM/GC's performance of both pre-construction Personal services and construction Work that are included within the definition of CM/GC services, consistent with ORS 279C.307(2); or

(B) The CM/GC's performance of internal quality control services, quality assurance services or other internal peer review of CM/GC work product that is intended to confirm the CM/GC's performance of the CM/GC Contract according to its terms.

(q) Socio-Economic Programs. The Contract shall clearly identify conditions relating to any required socio-economic programs (such as Affirmative Action or Prison Inmate Labor Programs), including the manner in which such programs affect the CM/GC's subcontracting requirements, the enforcement mechanisms available, and the respective responsibilities of the CM/GC and the District.

CONTRACT PROVISIONS

PPS 49-0800 Required Contract Clauses

Except as provided by PPS 49-0150 and 49-0160, the District shall include in all Solicitation Documents for Public Improvement Contracts all of the ORS 279C-required Contract clauses, as set forth in the checklist contained in PPS 49-0200(1)(c) regarding Solicitation Documents. The following series of rules provides further guidance regarding particular Public Contract provisions.

PPS 49-0810 Waiver of Delay Damages Against Public Policy

The District shall not place any provision in a Public Improvement Contract purporting to waive, release, or extinguish the rights of a Contractor to damages resulting from the District's unreasonable delay in performing the Contract. However, Contract provisions requiring notice of delay, providing for alternative dispute resolution such as arbitration (where allowable) or mediation, providing other procedures for settling contract disputes, or providing for reasonable liquidated damages are permissible.

PPS 49-0815 BOLI Public Works Bond

Pursuant to ORS 279C.830(2), the specifications for every Public Works Contract shall contain a provision stating that the Contractor and every subcontractor shall have a Public Works bond filed with the Construction Contractors Board before starting Work on the project, unless otherwise exempt. This bond is in addition to performance bond and payment bond requirements. See BOLI rule at OAR 839-025-0015.

PPS 49-0820 Retainage

(1) Withholding of Retainage. The District shall not retain an amount in excess of 5 percent of the Contract Price for Work completed. If the Contractor has performed at least 50 percent of the Contract Work and is progressing satisfactorily, upon the Contractor's submission of written application containing the surety's written approval, the District may, in its discretion, reduce or eliminate Retainage on any remaining progress payments. The District shall respond in writing to all such applications within a reasonable time. When the Contract Work is 97½ percent completed, the District may, at its discretion and without application by the Contractor, reduce the retained amount to 100 percent of the value of the remaining unperformed Contract Work. The District may at any time reinstate Retainage. Retainage shall be included in the final payment of the Contract Price.

(2) Form of Retainage. Unless the District finds in writing that accepting a bond or instrument described in section (2)(a) or (2)(b) of this rule poses an extraordinary risk that is not typically associated with the bond or instrument, the District, in lieu of withholding moneys from payment, shall accept from a Contractor:

(a) Bonds, securities, or other instruments that are deposited and accepted as provided in section (4)(a) of this rule; or

(b) A surety bond deposited as provided in section (4)(b) of this rule.

(3) Deposit in Interest-Bearing Accounts. Upon request of the Contractor, the District shall deposit cash Retainage in an interest-bearing account in a bank, savings bank, trust company, or savings association, for the benefit of the District. Earnings on such account shall accrue to the Contractor. The District shall establish the account through the State Treasurer.

(4) Alternatives to Cash Retainage. In lieu of cash Retainage to be held by the District, the Contractor may substitute one of the following:

(a) Deposit of bonds, securities, or other instruments.

(A) The Contractor may deposit bonds, securities, or other instruments with the District or in any bank or trust company to be held for the benefit of the District. If the District accepts the deposit, the District shall reduce the cash Retainage by an amount equal to the value of the bonds and securities, and reimburse the excess to the Contractor.

(B) Bonds, securities, or other instruments deposited or acquired in lieu of cash Retainage shall be of a character approved by the District, including, but not limited to:

(i) Bills, certificates, notes, or bonds of the United States.

(ii) Other obligations of the United States or agencies of the United States.

(iii) Obligations of a corporation wholly owned by the federal government.

(iv) Indebtedness of the Federal National Mortgage Association.

(v) General obligation bonds of the State of Oregon or a political subdivision of the State of Oregon.

(vi) Irrevocable letters of credit issued by an insured institution, as defined in ORS 706.008.

(C) Upon the District's determination that all requirements for the protection of the District's interests have been fulfilled, it shall release to the Contractor all bonds and securities deposited in lieu of Retainage.

(b) Deposit of Surety Bond. The District, at its discretion, may allow the Contractor to deposit a surety bond in a form acceptable to the District in lieu of all or a portion of funds retained or

to be retained. A Contractor depositing such a bond shall accept surety bonds from its subcontractors and suppliers in lieu of Retainage. In such cases, Retainage shall be reduced by an amount equal to the value of the bond, and the excess shall be reimbursed.

(5) Recovery of Costs. The District may recover from the Contractor all costs incurred in the proper handling of Retainage by reduction of the final payment.

(6) Additional Retainage When Certified Payroll Statements Not Filed. Pursuant to ORS 279C.845(7), if a Contractor is required to file certified payroll statements and fails to do so, the District shall retain 25 percent of any amount earned by the Contractor on a Public Works Contract until the Contractor has filed such statements with the District. The District shall pay the Contractor the amount retained under this provision within 14 days after the Contractor files the certified statements, regardless of whether a subcontractor has filed such statements (but see ORS 279C.845(1) regarding the requirement for both Contractors and subcontractors to file certified statements with the District). See BOLI rule at OAR 839-025-0010.

PPS 49-0830 Contractor Progress Payments

(1) Request for Progress Payments. Each month the Contractor shall submit to the District their written request for a progress payment based on an estimated percentage of Contract completion. At the District's discretion, this request may also include the value of material to be incorporated in the completed Work, which has been delivered to the premises and appropriately stored. The sum of these estimates is referred to as the "value of completed Work." With these estimates as a base, the District shall make a progress payment to the Contractor, which shall be equal to:

(a) The value of completed Work;

(b) Less those amounts that have been previously paid;

(c) Less other amounts that may be deductible or owing and due to the District for any cause; and

(d) Less the appropriate amount of Retainage.

(2) Progress Payments Do Not Mean Acceptance of work. Progress payments shall not be construed as an acceptance or approval of any part of the work, and shall not relieve the Contractor of responsibility for defective workmanship or material.

PPS 49-0840 Interest

(1) Prompt Payment Policy. The District shall pay promptly all payments due and owing to the Contractor on Contracts for Public Improvements.

(2) Interest on Progress Payments. Late payment interest shall begin to accrue on payments due and owing on the earlier of 30 days after receipt of invoice or 15 days after District approval of payment (the "Progress Payment Due Date"). The interest rate shall equal three times the discount rate on 90-day commercial paper in effect on the Progress Payment Due Date at the Federal Reserve Bank in the Federal Reserve District that includes Oregon, up to a maximum rate of 30 percent.

(3) Interest on Final Payment. Final payment on the Contract Price, including Retainage, shall be due and owing no later than 30 days after Contract completion and acceptance of the work. Late-payment interest on such final payment shall thereafter accrue at the rate of one and one-half percent per month until paid.

(4) Settlement or Judgment Interest. In the event of a dispute as to compensation due a Contractor for Work performed, upon settlement or judgment in favor of the Contractor, interest on the amount of the settlement or judgment shall be added to, and not made part of, the settlement or judgment. Such interest, at the discount rate on 90-day commercial paper in effect at the Federal Reserve Bank in the Federal Reserve District that includes Oregon, shall accrue from the later of the Progress Payment Due Date, or

30 days after the Contractor submitted a claim for payment to the District in writing or otherwise in accordance with the Contract requirements.

PPS 49-0850 Final Inspection

(1) Notification of Completion; Inspection. The Contractor shall notify the District in writing when the Contractor considers the Contract Work completed. Within 15 days of receiving the Contractor's notice, the District shall inspect the project and project records, and will either accept the work or notify the Contractor of remaining Work to be performed.

(2) Acknowledgment of Acceptance. When the District finds that all Work required under the Contract has been completed satisfactorily, the District shall acknowledge acceptance of the work in writing.

PPS 49-0860 Public Works Contracts

(1) Generally. ORS 279C.800 to 279C.870 regulates Public Works Contracts, as defined in ORS 279C.800(6), and requirements for payment of prevailing wage rates. Also see the administrative rules of the Bureau of Labor and Industries (BOLI) at OAR Chapter 839.

(2) Required Contract Conditions. As detailed in the above statutes and rules, every Public Works Contract shall contain the following provisions:

- **(a)** District authority to pay certain unpaid claims and charge such amounts to Contractors, as set forth in ORS 279C.515(1).
- **(b)** Maximum hours of labor and overtime, as set forth in ORS 279C.520(1).
- **(c)** Employer notice to employees of hours and days that employees may be required to Work, as set forth in ORS 279C.520(2).
- **(d)** Contractor-required payments for certain services related to sickness or injury, as set forth in ORS 279C.530.
- **(e)** A requirement for payment of prevailing rate of wage, as set forth in ORS 279C.830(1). If both state and federal prevailing rates of wage apply, the contract and every subcontract shall provide that all workers shall be paid the higher of the applicable state or federal prevailing rate of wage.
- **(f)** A requirement for filing a public works bond by the contractor and every subcontractor, as set forth in ORS 279(C).830(2).

(3) Requirements for Specifications. The specifications for every Public Works Contract, consisting of the procurement package (such as the project Manual, bid or proposal booklets, Request for quotes, or similar procurement specifications), shall contain the following provisions:

- **(a)** The state prevailing rate of wage, and, if applicable, the federal prevailing rate of wage, as required by ORS 279C.830(1)(a):
  - **(A)** Physically contained within or attached to hard copies of procurement specifications;
  - **(B)** Included by a statement incorporating the applicable wage rate publication into the specifications by reference in compliance with OAR 839-025-0020; or
  - **(C)** When the rates are available electronically or by Internet access, the rates may be incorporated into the specifications by referring to the rates and providing adequate information on how to access them in compliance with OAR 839-025-0020.

(b) If both state and federal prevailing rates of wage apply, a requirement that the Contractor shall pay the higher of the applicable state or federal prevailing rate of way to all workers. See BOLI rules at OAR 839-025-0020 and-0035.

(c) A requirement for filing a public works bond by the Contractor and every subcontractor, as set forth in ORS 279C.830(2).

PPS 49-0870 Specifications; Brand Name Products

(1) Generally. The District's Solicitation Document shall not expressly or implicitly require any product by brand name or mark, nor shall it require the product of any particular manufacturer or seller, except pursuant to an exemption granted under ORS 279C.345(2).

(2) Equivalents. The District may identify products by Brand Names as long as the following language: "approved equal," "or equal," "approved equivalent," or "equivalent," or similar language is included in the Solicitation Document. The District shall determine, in its sole discretion, whether an Offeror's alternate product is "equal" or "equivalent."

(3) Product Exemption. The Superintendent is delegated the authority to exempt products from the prohibition in section (1) of this rule, pursuant to ORS 279C.345(2), upon any of the following written findings:

(a) It is unlikely that the exemption will encourage favoritism in the awarding of Public Improvement Contracts or substantially diminish competition for Public Improvement Contracts;

(b) The specification of a product by Brand Name or mark, or the product of a particular manufacturer or seller, would result in substantial cost savings to the District;

(c) There is only one manufacturer or seller of the product of the quality required; or

(d) Efficient utilization of existing equipment or supplies requires the acquisition of compatible equipment or supplies.

PPS 49-0880 Records Maintenance; Right to Audit Records

(1) Records Maintenance; Access. Contractors and subcontractors shall maintain all fiscal records relating to Contracts in accordance with generally accepted accounting principles ("GAAP"). In addition, Contractors and subcontractors shall maintain all other records necessary to clearly document (i) their performance, and (ii) any claims arising from or relating to their performance under a Public Contract. Contractors and subcontractors shall make all records pertaining to their performance and any claims under a Contract (the books, fiscal records, and all other records, hereafter referred to as "Records") accessible to the District at reasonable times and places, whether or not litigation has been filed as to such claims.

(2) Inspection and Audit. The District may, at reasonable times and places, have access to and an opportunity to inspect, examine, copy, and audit the Records of any Person that has submitted cost or pricing data according to the terms of a Contract to the extent that the Records relate to such cost or pricing data. If the Person shall provide cost or pricing data under a Contract, the Person shall maintain such Records that relate to the cost or pricing data for three years from the date of final payment under the Contract, unless a shorter period is otherwise authorized in writing.

(3) Records Inspection; Contract Audit. The District and its authorized representatives shall be entitled to inspect, examine, copy, and audit any Contractor's or subcontractor's Records, as provided in section (1) of this rule. The Contractor and subcontractor shall maintain the Records and keep the Records accessible and available at reasonable times and places for a minimum period of three years from the date of final payment under the Contract or subcontract, as applicable, or until the conclusion of any

audit, controversy, or litigation arising out of or related to the Contract, whichever date is later, unless a shorter period is otherwise authorized in writing.

PPS 49-0890 District Payment for Unpaid Labor or Supplies

(1) Contract Incomplete. If the Contract is still in force, the District may, in accordance with ORS 279C.515(1), pay a valid claim to the Person furnishing the labor or services, and charge the amount against payments due or to become due to the Contractor under the Contract. If the District chooses to make such a payment as provided in ORS 279C.515(1), the Contractor and the Contractor's surety shall not be relieved from liability for unpaid claims.

(2) Contract Completed. If the Contract has been completed and all funds disbursed to the prime Contractor, all claims shall be referred to the Contractor's surety for resolution. The District shall not make payments to subcontractors or suppliers for Work already paid for by the District.

PPS 49-0900 Contract Suspension; Termination Procedures

(1) Suspension of work. In the event the District suspends performance of work for any reason considered by the District to be in the public interest other than a labor dispute, the Contractor shall be entitled to a reasonable extension of Contract time and to reasonable compensation for all costs, including a reasonable allowance for related overhead, incurred by the Contractor as a result of the suspension.

(2) Termination of Contract by Mutual Agreement for Reasons Other Than Default.

(a) Reasons for termination. The parties may agree to terminate the Contract or a divisible portion thereof if:

(A) The District suspends Work under the Contract for any reason considered to be in the public interest (other than a labor dispute, or any judicial proceeding relating to the work filed to resolve a labor dispute); and

(B) Circumstances or conditions are such that it is impracticable within a reasonable time to proceed with a substantial portion of the work.

(b) Payment. When a Contract, or any divisible portion thereof, is terminated pursuant to this section (2), the District shall pay the Contractor a reasonable amount of compensation for preparatory Work completed, and for costs and expenses arising out of termination. The District shall also pay for all Work completed based on the Contract Price. Unless the work completed is subject to unit or itemized pricing under the Contract, payment shall be calculated based on percent of Contract completed. No claim for loss of anticipated profits will be allowed.

(3) Public Interest Termination by the District. The District may include in its Contracts terms detailing the circumstances under which the Contractor shall be entitled to compensation as a matter of right in the event the District unilaterally terminates the Contract for any reason considered by the District to be in the public interest.

(4) Responsibility for Completed Work. Termination of the Contract or a divisible portion thereof pursuant to this rule shall not relieve either the Contractor or its surety of liability for claims arising out of the work performed.

(5) Remedies Cumulative. The District may, at its discretion, avail itself of any or all rights or remedies set forth in these rules, in the Contract, or available at law or in equity.

CONTRACT AMENDMENTS AND CHANGE ORDERS

PPS 49-0910 Public Improvement Contract Amendments and Changes to the Work

(1) Definitions for Rule. As used in this rule with regard to Public Improvement Contracts:

(a) **"Amendment"** means a written modification to the terms and conditions of a Public Improvement Contract, other than by Changes to the work, within the general scope of the original procurement that requires mutual agreement between the District and the Contractor.

(b) **"Changes to the work"** means a mutually agreed-upon change order, or a construction change directive or other written order issued by the District or its authorized representatives to the Contractor requiring a Change in the work within the general scope of a Public Improvement Contract and issued under its Changes provisions in administering the Contract and, if applicable, adjusting the Contract Price or Contract time for the Changed Work.

(2) Change Orders. Changes to the work are anticipated in construction and, accordingly, the District shall include Change provisions in all Public Improvement Contracts that detail the scope of the Changes clause, provide pricing mechanisms, authorize the District or its authorized representative(s) to issue Changes to the work, and provide a procedure for addressing Contractor claims for additional time or compensation. When Changes to the work are agreed to or issued consistent with the Contract's Changes provisions, they are not considered to be new procurements, and an exemption from competitive Bidding is not required for their issuance by the District. Change orders that are approved pursuant to the terms of a construction contract are not subject to the contract amendment procedures of these rules except as provided in Subsection 5 of this section.

(3) Change Order Authority. The District may establish internal limitations and delegations for authorizing Changes to the work, including dollar limitations. Dollar limitations on Changes to the work are not set by these rules, but such Changes are limited by the above definition of that term.

(4) Contract Amendments. Public Improvement Contract amendments within the general scope of the original procurement are not considered to be new procurements, and an exemption from competitive Bidding is not required in order to add components or phases of work specified in or reasonably implied from the Solicitation Document. Amendments to a Public Improvement Contract may be made only when:

(a) They are within the general scope of the original procurement;

(b) The field of competition and Contractor selection would not likely have been affected by the Contract modification. Factors to be considered in making that determination include similarities in Work, project site, relative dollar values, differences in risk allocation, and whether the original procurement was accomplished through competitive Bidding, competitive Proposals, competitive quotes, sole-source, or Emergency Contract;

(c) In the case of a Contract obtained under an Alternative Contracting Method, any additional Work was specified or reasonably implied within the findings supporting the competitive Bidding exemption; and

(d) The amendment is made consistent with this rule and other applicable legal requirements.

END OF DIVISION

PORTLAND PUBLIC SCHOOLS

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CONTRACTING RULES

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PPS DIVISION 45

DISTRICT CONTRACTS GENERALLY

PPS 45-0000 Generally

Except as expressly provided in other School Board Policies, PPS divisions 45, 46, 47, 48, and 49 (collectively, the "Portland Public Schools Public Contracting Rules") govern all District Contracts. These division 45 rules address delegation of contracting authority under ORS 279A.075 and 332.075, Ethics in Contracting, and procurement from Qualified Rehabilitation Facilities. Divisions 46, 47, 48, and 49 govern Public Contracts as defined in ORS chapters 279A, 279B, and 279C (the Public Contracting Code). Except as otherwise expressly provided in School Board Policy or these rules, these division 45 rules apply to all District Contracts, including Public Contracts as defined in the Public Contracting Code.

PPS 45-0100 Definitions

As used in the Public Contracting Code and divisions 45, 46, 47, 48, and 49 of these rules, and except as otherwise provided in School Board Policy:

(1) "District Contract" means all Contracts entered into by the District, including Public Contracts subject to the Public Contracting Code and divisions 46, 47, 48, and 49, and all other Contracts or agreements entered into by the District. For the purpose of these Public Contracting Rules, "District Contract" does not include settlements of lawsuits or other claims against the District that continue to be governed by Board Policy 8.60.021-P, or the purchase, conveyance, acceptance, sale, or lease of real property or an interest in real property.

AUTHORITY TO APPROVE AND EXECUTE DISTRICT CONTRACTS

PPS 45-0200 Authority to Approve District Contracts; Delegation of Authority to Superintendent

(1) The District is the Contracting Agency within the meaning of the Public Contracting Code.

(2) Except as otherwise provided in these rules, the powers and duties of the Local Contract Review Board under these rules shall be exercised and performed by the School Board, and the powers and duties of the District under the rules shall be exercised and performed by the Superintendent.

(3) Except as provided in section (4) of this rule or as otherwise expressly authorized in these rules, the School Board shall approve all District Contracts.

(4) Pursuant to ORS 279A.075 and 332.075(3), and except as expressly limited by other School Board Policy, the School Board delegates to the Superintendent the authority to enter into and approve payment on District Contracts in the following circumstances:

- **(a)** The District Contract is within appropriations made by the School Board and is not a collective bargaining agreement or a Service Contract that includes the provision of labor performed by employees of the School District, as defined in ORS 332.075(3); and
- **(b)** In any of the following circumstances:
  - **(A)** The total amount payable by the District under the individual District Contract does not exceed $150,000;
  - **(B)** The District Contract is for routine and customary expenditures, including but not limited to payroll, payroll taxes and benefits, utility bills, and postage;
  - **(C)** Advance authorization has been given by the School Board for the Superintendent to execute a particular District Contract or class of District Contracts;

(D) The District Contract is an Emergency Procurement;

(E) The District Contract is a change order or Contract amendment to a prior-approved Contract authorized under these rules;

(F) An offer of judgment made in the course of litigation in with the District is a party when the Superintendent and general counsel determine that such an offer is in the best interest of the District or is to the District's tactical advantage; or

(G) These rules otherwise expressly authorize the Superintendent to approve the Contract.

(5) The Superintendent may designate in writing any District employee or employees to exercise all or a portion of the Superintendent's powers and duties under these rules.

(6) If the Superintendent authorizes an offer of judgment pursuant to PPS 45-0200(4)(b)(F) in an amount exceeding $75,000~~25,000~~, the superintendent shall request that the general counsel draft a lawyer-client privileged memo to the School Board to explain the legal basis for the offer of judgment.

(7) No district employee or official shall authorize and no contractor shall undertake any work under a district contract prior to full execution of the contract by all authorized signatories. Notwithstanding the forgoing, the Superintendent may authorize work to begin under a contract prior to full execution in the following circumstances:

(a) The contract is an intergovernmental agreement pursuant to ORS chapter 190, the parties have agreed in principal to the terms of the contract, and the only remaining step is circulation of the Contract for approval; or

(b) The contract is an amendment that is subject to approval of the Board of Education because it will increase the cost of the contract above the superintendent's contract approval authority, but the Board approval process will cause a delay in work completion that will prevent timely delivery of essential services. For the purposes of this exception, "essential services" means goods, services, personal services, or construction services necessary for a school to open on time, a class to start on time, a class or program to complete on time, to comply with conditions of grant that is otherwise at risk of loss, or other services critical to timely and complete education of district students. The Superintendent will only authorize such work in cases where the delay is caused by factors outside of the District's control and that could not have been identified when the contract was first negotiated.

ETHICS IN CONTRACTING

PPS 45-0300 Policy

These rules supplement and do not replace the Oregon Government Ethics Law (ORS 244.010 through 244.400). These rules are designed to accomplish the policy of ORS 244.010 that service as a public official is a public trust and that implementation of District Contracting under these rules and the Public Contracting Code should be free of undisclosed conflicts or undue influence.

PPS 45-0305 Ethics in the Solicitation and Award of District Contracts

District officers who participated in the process of development, selection, and award of District Contracts shall comply with the following rules:

(1) Definitions:

(a) **"Business"** means any corporation, partnership, proprietorship, firm, enterprise, franchise, association, organization, self-employed individual, and any other legal entity operated for economic gain, but excluding any income producing, not-for-profit corporation that is tax exempt

under section 501(c) of the Internal Revenue Code with which the District officer or relative is associated only as a member or board director or in a non-remunerative capacity. If the business is privately held, the District official or relative is "associated with the business" if the Person is a director, officer, owner, or employee, or in which the Person owns or has owned stock, debt instruments, stock options, or other form of equity interest worth more than $1,000 in the preceding calendar year. If the business is publicly held, the District official or relative is "associated with the business" if the Person is a director or officer or owns or has owned $100,000 or more of stock, debt instruments, stock options, or other form of equity interest in the preceding calendar year. If the District official is required to file a statement of economic interest, "business" also includes a business listed as a source of income as required under ORS 244.060(3).[1]

(b) **"Conflict of interest"** means any action, decision, or recommendation by a District officer in the course of participating in a procurement under these rules that would ("actual conflict of interest") or could ("potential conflict of interest") be to the private pecuniary benefit or detriment of the District officer, a relative of the District officer, or a business with which the District officer or relative is associated. For the purpose of this requirement:

(c) **"District officer"** means any person who is serving the District as an elected official, appointed official, employee, or agent, whether or not the person is compensated for those services.

(d) **"Gift"** means something of economic value given to a public official or the public official's relative without an exchange of valuable consideration of equivalent value, including the full or partial forgiveness of indebtedness, which is not extended to others who are not public officials or the relatives of public officials on the same terms and conditions. "Gift" also includes something of economic value given to a public official or the public official's relative for valuable consideration less than that required from others who are not public officials.

(e) **"Relative"** means:

(A) The District officer's spouse or domestic partner;

(B) Children of the District officer, spouse, or domestic partner;

(C) Siblings, spouses of siblings, or parents of the public official, spouse, or domestic partner;

(D) Any individual for whom the District officer has a support obligation;

(E) Any individual for whom the District officer provides benefits related to the public official's public employment or from whom the District officer receives benefits; and

(F) Any person who resides with the public official.

(2) Disclosure of Conflict of Interest Required. Any District official participating in a District procurement, whether for goods or services, Personal services, Public Works, Public Improvements, or any other District Contract shall disclose actual or potential conflicts of interest.

(a) Appointed District Officials. An appointed District official shall disclose actual or potential conflicts of interest in writing to the District official's appointing authority (the person who has hire-and-fire authority over the official). This writing shall disclose the nature of the conflict and request the appointing authority to dispose of the matter. The appointing authority shall respond in writing by designating an alternate to dispose of the matter or directing the District officer to dispose of the matter as directed by the appointing authority.

[1] The only District officials required to file a statement of economic interest are the Superintendent and the chief financial officer.

(b) Elected District Official or Officials Who Serve on Advisory Boards or Commissions. Such District officials shall publicly announce an actual or potential conflict of interest prior to taking any action on the matter giving rise to the conflict. If the conflict is an actual conflict of interest, the public official shall refrain from participating in the decision or discussion of the issue. If the conflict is only a potential conflict of interest, the public official may participate in the debate and decision following disclosure of the potential conflict.

(3) Gifts. District officers are prohibited from soliciting or receiving gifts with an aggregate value of in excess of $50 in a calendar year from any single source that could reasonably be known to have a legislative or administrative interest in any matter subject to the decision or vote of the District official. For the purpose of this section, a District official is considered a decision-maker in the procurement process if he or she makes decisions or recommendations in regard to the drafting of the procurement, the Solicitation process, the opening, review, or scoring of the Solicitation, or a recommendation or decision to award, correct, or reject a solicitation, or response to or resolution of a protest.

(4) Use of Office for Personal Gain Prohibited. District officers, employees, and agents are prohibited from using their official position for personal gain.

(5) Use of Confidential District Information for Gain Prohibited. District officers, employees, and agents are prohibited from using confidential information gained in the course of the screening and selection procedures for personal financial gain.

PPS 45-0310 Additional Standards of Conduct for Procurement of District Contracts Funded in Whole or in Part by Federal Award

In addition to compliance with ORS 244 and PPS 45-0300 to 45-0305 with District employees, officers and agents in the selection, award, or administration of any contract shall comply with 2 CFR 318(c)(1) regarding procurement of District Contracts funded in whole or in part by Federal award:

(1) No District employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if such person has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of such persons immediate family, such persons partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. A district employer, officer, or agent shall notify such person's appointing authority and shall immediately cease participation in all procurement or award activities relating to or management of such contract.

(2) District officers, employees, and agents may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts supported by a Federal award. This section shall not apply to items that are excluded from the definition of "gift" in ORS 244.020.

(3) A district employer, officer, or agent who violates any of the standards set forth in PPS 45-0310 will be subject to discipline up to and including termination.

PPS 45-0315 Penalties

Any District employee, officer, or agent that fails to comply with PPS 45-0300 to 45-0310 can face investigation or penalty under ORS chapter 244 and/or adverse employment action up to and including termination.

PROCUREMENT FROM QUALIFIED REHABILITATION FACILITIES ("QRF")

PPS 45-0405 QRF Definitions

(1) "QRF" means an activity center or rehabilitation facility, certified as a community rehabilitation program or as a vocational service provider through the Oregon Department of Human Services that the State procurement Office has determined to be qualified under OAR 125-055-0015.

(2) "QRF Procurement List" means a listing of those nonprofit agencies for disabled individuals who currently are qualified, under OAR 125-055-0015, to participate in the program created by ORS 279.835 through 279.850 and includes, as required by ORS 279.850(1), a list of the products and services offered by QRFs and determined by the State Procurement Office, under OAR 125-055-0020, to be suitable for purchase by Contracting Agencies such as the District.

PPS 45-0410 Required Procurement of QRF Products or Services

(1) As required by ORS 279.850(1), if the District intends to procure a Product or service that is listed on the QRF Procurement List, the District shall procure that Product or service, at the Price determined by the State of Oregon Procurement Office, from a QRF if the Product or service is of specifications appropriate to the District's procurement needs and is available within the time required by the District.

(2) The most current QRF Procurement List may be reviewed at the State of Oregon procurement Office Web site at https://dasapp.oregon.gov/qrf/index.aspx.

(3) The Public Contracting Code does not apply to QRF procurements pursuant to ORS 279A.025(4). QRF procurements are therefore exempt from divisions 46, 47, 48, and 49 of these rules.

PPS 45-0500 Contract Extensions

Except as otherwise provided in these rules:

(1) A Current Contract May Be Extended to Complete the Contract Work. If it appears that a District Contract will expire according to its terms before the work provided under the Contract will be completed, the Superintendent may extend the Contract for such period of time necessary to complete the work.

(2) An Expired Contract May Be Reinstated to Complete the Contract Work. If a District Contract inadvertently expires according to its terms before the work provided under the Contract is completed, the Superintendent may reinstate the Contract for such period of time necessary to complete the work. The reinstated Contract shall be deemed to begin upon the expiration of the prior Contract and end upon the termination date set forth in the extension.

(3) A Contract Extension May Not Include Substantive Amendments to the Contract. An extension may not be used to amend or change the scope of the Contract or increase the price of the Contract, except as otherwise may be allowed in these rules. Contract amendments are subject to PPS 46-0480, 47-0800, or 49-0910, depending on the type of Contract.

END OF DIVISION 45

PPS DIVISION 46

PUBLIC CONTRACTING RULES APPLICABLE TO ALL PUBLIC CONTRACTS AND PERSONAL SERVICES CONTRACTS

PPS 46-0000 Generally

These division 46 rules are intended to implement the provisions of ORS 279A applicable to all public procurements, and the provisions of the Uniform Guidance for all District Contracts supported in whole in part by a Federal award. Division 46 also addresses delegation of contracting authority under ORS 279A.075 and 332.075, Contracts for Personal services, and ethics in District Contracting.

PPS 46-0100 Application

(1) Pursuant to ORS 279A.065(5), the District hereby adopts its own public contracting rules ("rules" or "a rule"). Pursuant to ORS 279A.065(1), the Attorney General's Model Rules do not apply to the District. Pursuant to ORS 279A.065(5), the District adopts these rules. These rules consist of the following four divisions:

- **(a)** Division 46 applies to all Public Contracts and implements ORS 279A.
- **(b)** Division 47 applies only to Public Contracts for goods or services and implements ORS 279B.
- **(c)** Division 48 applies only to Public Contracts for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, or Land Surveying services and related service contracts and implements ORS 279C.100 through 279C.125
- **(d)** Division 49 applies only to Public Contracts for Construction services and implements ORS 279C.300 through 279C.910.

(2) Most of these rules are adapted from the Attorney General's Model Rules and the numbering generally tracks the numbering in OAR Chapter 137 divisions 46, 47, 48, and 49. Except where these rules differ from the Model Rules, the District intends its rules to be interpreted consistently with the Model Rules.

(3) These rules apply to Public Contracts first advertised on or after January 1, 2024.

(4) The District shall review the rules each time the Attorney General modifies the Model Rules to ensure compliance with statutory changes. The District may adopt other rules, and modify as necessary, to carry out the provisions of the Public Contracting Code pursuant to ORS 279A.070.

PPS 46-0110 Definitions

As used in the Public Contracting Code and divisions 45, 46, 47, 48, and 49 of these rules, unless the context or a specifically applicable definition requires otherwise:

(1) **Addendum** or **Addenda** means an addition to or deletion from, a material change in, or general interest explanation of a Solicitation Document.

(2) **Administering Contracting Agency** means a governmental body in this state or in another jurisdiction that solicits and establishes the Original Contract for procurement of goods, services, or Public Improvements in a Cooperative Procurement. Administering Contracting Agency includes, for Interstate Cooperative Procurements, any governmental body, domestic or foreign, that is authorized under the governmental body's laws, rules, or regulations, to enter into Public Contracts.

(3) **Award** means, as the context requires, either the act or occurrence of the District's identification of the Person with whom the District shall enter into a Contract following the resolution of any protest of the District's selection of that Person and the completion of all Contract negotiations.

(4) Benefit Company means a corporation or a limited liability company that is incorporated, organized, formed or created under ORS 60.754 and the corporation's articles of incorporation state that the corporation is a benefit company subject to ORS 60.750 to 60.770.

(5) Bid means a written response to an Invitation to Bid.

(6) Bidder means a Person who submits a Bid in response to an Invitation to Bid.

(7) Brand Name or Equal Specification is defined in ORS 279B.200(1) and means a specification that uses one or more manufacturers' names, makes, catalog numbers, or similar identifying characteristics to describe the standard of quality, performance, functionality, or other characteristics needed to meet the District's requirements, and that authorizes Offerors to offer goods or services that are equivalent or superior to those named or described in the specification.

(8) Brand Name Specification is defined in ORS 279B.200(2) and means a specification limited to one or more products, Brand Names, makes, manufacturers' names, catalog numbers, or similar identifying characteristics.

(9) CFR means the Code of Federal Regulations of the United States of America.

(10) Class Special Procurement is defined in ORS 279B.085 and means a contracting procedure that differs from the procedures described in ORS 279B.055, 279B.060, 279B.065, and 279B.070, and is for the purpose of entering into a series of Contracts over time or for multiple projects for the acquisition of a specified class of goods or services.

(11) Closing means the date and time specified in a Solicitation Document as the deadline for submitting Offers.

(12) Code means the Public Contracting Code.

(13) Competitive Sealed Bidding is a procurement process where a Contract is awarded based on price pursuant to the lowest Responsive and Responsible bidder.

(14) Competitive Range means the Proposers with whom the District shall conduct discussions or negotiations if the District intends to conduct discussions or negotiations in accordance with PPS 47-0261 or 49-0650.

(15) Contract means a contract for sale or other disposal, or a purchase, lease, rental or other acquisition, by the District of personal property, services, including personal services, public improvements, public works, minor alterations, or ordinary repair or maintenance necessary to preserve a public improvement. "Contract" does not include grants.

(1) Contract Price means, as the context requires, the maximum monetary obligation that the District either will or may incur under a Contract, including bonuses, incentives, and contingency amounts, if the Contractor fully performs under the Contract.

(2) Contract Review Board or **Local Contract Review Board** means the District Board of Directors acting as the Local Contract Review Board for the District under ORS 279A.060.

(3) Contracting Agency is defined in ORS 279A.010(1)(b) and means a Public Body authorized by law to conduct a procurement. Contracting Agency includes, but is not limited to, the Director of the Oregon Department of Administrative services and any Person authorized by a Contracting Agency to conduct a procurement on the Contracting Agency's behalf. Contracting Agency does not include the judicial department or the legislative department.

(4) Contractor means the Person with whom the District enters into a Contract and is interchangeable with "Consultant" and "Provider."

(5) Cooperative Procurement is defined in ORS 279A.200 and means a procurement conducted by an Administering Contracting Agency on behalf of one or more governmental bodies. "Cooperative Procurement" includes, but is not limited to, multi-party Contracts and Price Agreements. "Cooperative Procurement" does not include an agreement formed among only governmental bodies under ORS chapter 190 or other legal authority for establishing agreements between or among governmental bodies or agencies or tribal governing bodies or agencies.

(6) Cooperative Procurement Group means a group of authorized Contracting Agencies or other governmental body, domestic or foreign, joined through an intergovernmental agreement for the purposes of facilitating Cooperative Procurements pursuant to ORS 279A.200.

(7) Days means calendar days, except as otherwise specified in these rules.

(8) Designated Procurement Officer means the individual designated and authorized by the Superintendent to perform certain procurement functions described in these rules.

(9) Descriptive Literature means the written information submitted with the Offer that addresses the goods and services included in the Offer.

(10) District means School District No. 1J, Multnomah County, Oregon, doing business as Portland Public Schools.

(16) Disqualification means a disqualification, suspension, or Debarment pursuant to ORS 200.065, 200.075, or 279A.110, or PPS 46-0210.

(17) Electronic Advertisement means the District's Solicitation Document, Request for quotes, Request for Information, or other document inviting participation in the District's procurements available over the Internet via (a) the World Wide Web or some other internet protocol or (b) the District's electronic procurement System.

(18) Electronic Offer means a response to the District's Solicitation Document or Request for quotes submitted to the District via (a) the World Wide Web or some other internet protocol or (b) the District's electronic procurement System.

(19) Electronic Procurement System means an information system that Persons may access through the Internet, using the World Wide Web or some other Internet protocol, or that Persons may otherwise remotely access using a computer that enables Persons to send Electronic Offers and the District to post Electronic Advertisements, receive Electronic Offers, and conduct other activities related to a procurement.

(20) Emergency means circumstances that:

- **(a)** Could not have been reasonably foreseen;
- **(b)** Create a substantial risk of loss, damage, or interruption of services or a substantial threat to property, public health, welfare, or safety; and
- **(c)** Require prompt execution of a Contract to remedy the condition.

(21) Emergency Procurement means a sourcing method pursuant to ORS 279B.080.

(22) Energy Savings Performance Contract means a Public Contract between the District and a Qualified Energy service Company for the identification, evaluation, recommendation, design, and construction of Energy Conservation Measures, including a Design-Build Contract, that guarantee energy savings or performance.

(23) Engineer is defined in ORS 279C.100 and means a Person who is registered and holds a valid certificate in the practice of engineering in the State of Oregon, as provided under ORS 672.002 through 672.325, and includes all terms listed in ORS 672.002(2).

(24) Facsimile means an exact reproduction or copy of graphic or verbal material converted into electrical signals that are transmitted via telephone to produce a paper copy of the material on the receiving fax machine.

(25) Federal Award is defined in 2 CFR §200.38 and means, depending on the context, in either paragraph (a) or (b) of this section:

(a)

(i) The Federal financial assistance that that the District receives directly from a Federal awarding agency or indirectly from a pass-through entity, as described in 2 CFR §200.101 Applicability (such as the State of Oregon); or

(ii) The cost-reimbursement contract under the Federal Acquisition Regulations that the District receives directly from a Federal awarding agency or indirectly from a pass-through entity, as described in 2 CFR §200.101 (Applicability).

(b) The instrument setting forth the terms and conditions. The instrument is the grant agreement, cooperative agreement, other agreement for assistance covered in paragraph (b) of 2 CFR §200.40 (Federal financial assistance), or the cost-reimbursement contract awarded under the Federal Acquisition Regulations.

(c) "Federal award" does not include other contracts that a Federal agency uses to buy goods or services from a contractor or a contract to operate Federal government owned, contractor operated facilities (GOCOs).

(26) Findings is defined in ORS 279C.330 and means the justification for an exemption from competitive Bidding for a Contract for a Public Improvement that includes, but is not limited to, information regarding:

(a) Operational, budget, and financial data;

(b) Public benefits;

(c) Value engineering;

(d) Specialized expertise required;

(e) Public safety;

(f) Market conditions;

(g) Technical complexity; and

(h) Funding sources.

(27) Flexible Services Contractor Pool or **FSCP** is a list of qualified contractors determined pursuant to a Request for Qualifications or other method of competitive solicitation with whom the Superintendent may enter into a Contract as provided for in these rules.

(28) Fringe Benefits is defined in ORS 279C.800 and means the amount of:

(a) The rate of contribution irrevocably made by a Contractor or subcontractor to a trustee or to a third person under a plan, fund, or program; and

(b) The rate of costs to the Contractor or subcontractor that may be reasonably anticipated in providing benefits to workers pursuant to an enforceable commitment to carry out a financially responsible plan or program that is committed in writing to the workers affected, for medical or hospital care, pensions on retirement or death, compensation for injuries or illness resulting from occupational activity, or insurance to provide any of the foregoing, for unemployment benefits, life insurance, disability and sickness insurance, or accident insurance, for vacation and holiday

pay, for defraying costs of apprenticeship or other similar programs, or for other bona fide Fringe Benefits, but only when the Contractor or subcontractor is not required by other federal, state, or local law to provide any of these benefits.

(29) Good-Faith Dispute is defined in ORS 279C.580 and means a documented dispute concerning:

(a) Unsatisfactory job progress;

(b) Defective Work not remedied;

(c) Third-party claims filed or reasonable evidence that claims will be filed;

(d) Failure to make timely payments for labor, equipment, and materials;

(e) Damage to the prime Contractor or subcontractor; or

(f) Reasonable evidence that the subcontract cannot be completed for the unpaid balance of the subcontract sum.

(30) Goods is defined in ORS 279A.010(1)(i) and means supplies, equipment, materials, and personal property, including any tangible, intangible, and intellectual property and rights and licenses in relation thereto, and combinations of any of the items identified herein.

(31) Goods and Services or **Goods or Services** is defined in ORS 279A.010(1)(j) and means any combinations of any of the items identified in the definitions of "goods" and "services."

(32) Grant is defined in ORS 279A.010(k) and means:

(a) An agreement under which the District receives money, property, or other assistance including, but not limited to, federal assistance that is characterized as a Grant by federal law or regulations, loans, loan guarantees, credit enhancements, gifts, bequests, commodities, or other assets, from a grantor for the purpose of supporting or stimulating a program or activity of the District and in which no substantial involvement by the grantor is anticipated in the program or activity other than involvement associated with monitoring compliance with the Grant conditions; or

(b) An agreement under which the District provides money, property, or other assistance including, but not limited to, federal assistance that is characterized as a Grant by federal laws or regulations, loans, loan guarantees, credit enhancements, gifts, bequests, commodities, or other assets, to a recipient for the purpose of supporting or stimulating a program or activity of the recipient, and in which no substantial involvement by the District is anticipated in the program or activity other than involvement associated with monitoring compliance with the Grant conditions.

(c) Grant does not include a Public Contract:

(A) For a Public Improvement or Public Works, as defined in ORS 279C.800, or

(B) For Emergency Work, minor alterations, or ordinary repair or maintenance necessary to preserve a Public Improvement, when under the Public Contract:

(i) The District pays moneys that the District has received under a Grant, and

(ii) Such payment is made in consideration for Contract performance intended to realize or to support the realization of the purposes for which Grant funds were provided to the District.

(33) Interstate Cooperative Procurement is defined in ORS 279A.200 and means a Permissive Cooperative Procurement in which the Administering Contracting Agency is a governmental body, domestic or foreign, that is authorized under the governmental body's laws, rules, or regulations to enter into Public

Contracts and in which one or more of the participating governmental bodies are located outside of their state.

(34) Invitation to Bid or **ITB** means the Solicitation Document issued to invite Offers from prospective Contractors under either ORS 279B.055 or 279C.335.

(35) Joint Cooperative Procurement is defined in ORS 279A.200 and means a Cooperative Procurement that identifies:

(a) The participating governmental bodies or the Cooperative Procurement Group;

(b) The Contract requirements or estimated Contract requirements for Price Agreements.

(36) Land Surveyor is defined in ORS 279C.100(4) and means a Person who is registered and holds a valid certificate in the practice of land surveying in the State of Oregon as provided under ORS 672.002 through 672.325, and includes all terms listed in ORS 672.002(5).

(37) Life Cycle Cost means the total cost to the District of acquiring, operating, supporting, and (if applicable) disposing of the items being acquired.

(38) Life-Cycle Costing means the various quantifiable cost factors, in addition to the acquisition cost of goods or services (also referred to in this rule as "product, equipment, and service, separately or in any combination thereof").

(39) Locality is defined in ORS 279C.800 and means the following district in which the Public Works, or the major portion thereof, is to be performed: District 2, composed of Clackamas, Multnomah, and Washington Counties.

(40) Lowest Responsible Bidder means the lowest bidder who:

(a) Has substantially complied with all prescribed Public Contracting procedures and requirements;

(b) Has met the standards of responsibility set forth in ORS 279B.110 or 279C.375;

(c) Has not been Debarred or disqualified by the District under ORS 279B.130 or 279C.440; and

(d) Is not on the list created by the Oregon Construction Contractors Board under ORS 701.227, if the advertised Contract is a Public Improvement Contract.

(41) Model Rules means the Attorney General's Model Rules of Procedure for Public Contracting as required under ORS 279A.065.

(42) Nonprofit Procurement Organization means a local, state, or national organization formed as a tax-exempt entity under the United States Internal Revenue Code for the purpose of conducting large-scale or volume-competitive procurements as an agent for its governmental and/or nonprofit members in order to obtain the most favorable pricing or terms.

(43) Nonresident Bidder is defined in ORS 279A.120 and means a bidder who is not a resident bidder.

(44) OAR means the Oregon Administrative Rules.

(45) Offer means a written offer to provide goods or services in response to a Solicitation Document.

(46) Offeror means a Person who submits an Offer.

(47) Opening means the date, time, and place specified in the Solicitation Document for the public opening of Offers.

(11) ORS means the Oregon Revised Statutes.

(12) Original Contract is defined in ORS 279A.200(f) and means the initial Contract or Price Agreement solicited and awarded during a Cooperative Procurement by an Administering Contracting Agency.

(13) Permissive Cooperative Procurement is defined in ORS 279A.200 and means a Cooperative Procurement in which the Purchasing Contracting Agencies are not identified.

(14) Person means any of the following with legal capacity to enter into a Contract: individual, corporation, business trust, estate, trust, partnership, limited liability company, association, joint venture, governmental agency, public corporation, or any other legal or commercial entity.

(15) Personal Services means the services or type of services performed under a Personal services Contract as defined in PPS 46-0500.

(16) Personal Services Contract or **PSC** is a Contract primarily for Personal services as designated in these rules. Personal services contract does not include a Contract for the services of an Architect, Engineer, Land Surveyor or Provider of Related Services (as defined in ORS 279C.100).

(17) Prevailing Rate of Wage is defined in ORS 279C.800 and means the rate of hourly wage, including all Fringe Benefits, paid in the Locality to the majority of workers employed on projects of similar character in the same trade or occupation, as determined by the Commissioner of the Bureau of Labor and Industries.

(18) "Price Agreement means a Public Contract for the procurement of goods or services at a set price with:

(a) No guarantee of a minimum or maximum purchase; or

(b) An initial order or minimum purchase combined with a continuing Contractor obligation to provide goods or services in which the District does not guarantee a minimum or maximum additional purchase.

(19) Procurement is defined in ORS 279A.010(1)(w) and means the act of purchasing, leasing, renting, or otherwise acquiring goods or services. Procurement includes each function and procedure undertaken or required to be undertaken by the District to enter into a Public Contract, administer a Public Contract, and obtain the performance of a Public Contract under the Public Contracting Code.

(20) Procurement Description is defined in ORS 279B.005(1)(b) and means the words used in a solicitation to describe the goods or services to be procured. "Procurement Description" includes specifications attached to or made a part of the Solicitation.

(21) Product Sample means the exact goods or a representative portion of the goods offered in an Offer, or the goods requested in the Solicitation Documents as a sample.

(22) Proposal means a written response to a Request for proposal.

(23) Proposer means a Person who submits a proposal in response to a Request for proposal.

(24) Public Agency is defined in ORS 279C.800(5) and means the State of Oregon or any political subdivision thereof, or any county, city, district, authority, public corporation, or entity, and any instrumentality thereof organized and existing under law or charter.

(25) Public Body is defined in ORS 279A.010(1)(y) and has the meaning given that term in ORS 174.109.

(26) Public Contracting is defined in ORS 279A.010(1)(aa) and means procurement activities described in the Public Contracting Code relating to obtaining, modifying, or administering Public Contracts or Price Agreements.

(27) Public Improvement is defined in ORS 279A.010 and means a project for construction, reconstruction, or major renovation on real property by or for the District. "Public Improvement" does not include:

(a) Projects for which no funds of the District are directly or indirectly used, except for participation that is incidental or related primarily to project design or inspection; or

(b) Emergency Work, minor alteration, or ordinary repair or maintenance necessary to preserve a Public Improvement.

(28) Public Improvement Contract means a Public Contract for a Public Improvement. "Public Improvement Contract" does not include a Public Contract for Emergency Work, minor alterations, or ordinary repair or maintenance necessary to preserve a Public Improvement.

(29) (a) Public Works is defined in ORS 279C.800 and includes, but is not limited to:

(A) Roads, highways, buildings, structures, and improvements of all types, the construction, reconstruction, major renovation, or painting of which is carried on or contracted for by any Public Agency to serve the public interest;

(B) A project that uses $750,000 or more funds of a public agency for constructing, reconstructing, painting or performing a major renovation on a road, highway, building, structure, or improvement of any;

(C) A project that uses funds of private entity for construction a privately owned road, highway, building, structure, or improvement of any type a public agency will use or occupy 25 percent or more of the square footage of the completed project;

(A) Notwithstanding the provisions of ORS 279C.810 (Exemptions) (2)(a), (b) and (c), a device, structure or mechanism, or a combination of devices, structures or mechanisms, that:

(i) Uses solar radiation as a source for generating heat, cooling or electrical energy; and

(ii) Is constructed or installed, with or without using funds of a public agency, on land, premises, structures or buildings that a public body, as defined in ORS 174.109 ("Public body" defined), owns; or

(B) Notwithstanding paragraph (b)(A) of this subsection and ORS 279C.810 (Exemptions) (2)(b) and (c), construction, reconstruction, painting or major renovation of a road, highway, building, structure or improvement of any type that occurs, with or without using funds of a public agency, on real property that a public university listed in ORS 352.002 (Public universities) owns.

(b) Public Works does not include:

(A) Reconstructing or renovating privately owned property that a public agency leases; or

(B) A private nonprofit entity's renovation of publicly owned real property that is more than 75 years old if:

(i) The real property is leased to the private nonprofit entity for more than 25 years;

(ii) Funds of a Public Agency used in the renovation do not exceed 15 percent of the total cost of the renovation; and

(iii) Contracts for the renovation were advertised or, if not advertised, were entered into before July 1, 2003, but the renovation has not been completed on or before July 13, 2007.

(30) Purchase Order means the District's document to formalize a purchase transaction with a Provider. Acceptance of a Purchase Order constitutes a Public Contract. The District's use of a Purchase Order shall comply with the Public Contracting Code and these rules.

(31) Purchasing Contracting Agency is defined in ORS 279A.200(1)(h) and means a governmental body that procures goods, services, or Public Improvements from a Contractor based on the Original Contract established by an Administering Contracting Agency.

(32) QBS means the qualifications-based selection process mandated by ORS 279C.110 for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services and Related services Contracts under certain circumstances.

(33) Recycled Materials means recycled paper (as defined in ORS 279A.010(1)(gg)), recycled PETE products (as defined in ORS 279A.010(1)(hh)), and other recycled plastic resin products and recycled products (as defined in ORS 279A.010(1)(ii)).

(34) Recycled Product is defined in ORS 279A.010(1)(ii) and means all materials, goods, and supplies, not less than 50 percent of the total weight of which consists of secondary and post-consumer waste, with not less than 10 percent of its total weight consisting of Post-consumer Waste. "Recycled Product" includes any product that could have been disposed of as solid waste, having completed its life cycle as a consumer item, but otherwise is refurbished for reuse without substantial alteration of the product's form.

(35) Request for Proposal or **RFP** is defined in ORS 279B.005 and means all documents, either attached or incorporated by reference, and any Addenda thereto, used for soliciting Proposals in accordance with either ORS 279B.060 or 279C.405 and related rules.

(36) Request for Qualifications or **RFQ** means a written document issued by the District to which Contractors respond in writing by describing their experience with and qualifications for the services, Personal services, or Architectural, Engineering or Land Surveying services, or Related services, described in the solicitation document.

(37) Request for Quotes means a written or oral request for prices, rates, or other conditions under which a potential Contractor would provide goods or perform services, Personal services, or Public Improvements described in the request.

(38) Responsible means meeting the standards set forth in PPS 47-0640 or 49-0390(2), and not Debarred or disqualified by the District under PPS 47-0575 or 49-0370.

(39) Resident Bidder is defined in ORS 279A.120 and means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the Bid, has a business address in this state, and has stated in the bid whether the bidder is a "Resident bidder."

(40) Responsible Offeror means a Person who has submitted an Offer and met the standards set forth in PPS 47-0500 or PPS 49-0390(2), and who has not been Debarred or disqualified by the District under PPS 47-0575 or 49-0370, respectively. When used alone, "Responsible" means meeting the aforementioned standards.

(41) Responsive means having the characteristic of substantial compliance in all material respects with applicable solicitation requirements.

(42) Responsive Offer means, as the context requires, a Responsive Bid, Responsive Proposal or other Offer that substantially complies in all material respects with applicable solicitation requirements.

(43) Retainage is defined in ORS 279C.550 and means the difference between the amount earned by a Contractor on a Public Contract and the amount paid on the Contract by the District.

(44) Revenue Contract means a Contract where the District is providing goods or services to another party for compensation. Revenue Contracts are typically intergovernmental agreements with other education or education-related social service providers, or Contracts with other community partners in furtherance of the District's educational mission.

(45) School Board means the District Board of Directors acting as the governing body of the District pursuant to ORS chapter 332.

(46) Secondary Waste Content or **Secondary Waste Materials** is defined in ORS 279A.010(1)(jj) and means fragments of products or finished products of a manufacturing process that has converted a virgin resource into a commodity of real economic value. "Secondary Waste Materials" includes post-consumer waste. "Secondary Waste Materials" does not include excess virgin resources of the manufacturing process. For paper, "Secondary Waste Materials" does not include fibrous waste generated during the manufacturing process, such as fibers recovered from waste water or trimmings of paper machine rolls, mill broke, wood slabs, chips, sawdust, or other wood residue from a manufacturing process.

(47) Services is defined in ORS 279A.010(1) and means services other than Personal services designated under PPS 46-0500 and ORS 279A.055.

(48) Signature means any written mark, word, or symbol that is made or adopted by a Person with the intent to be bound and that is attached to or logically associated with a written document to which the Person intends to be bound.

(49) Signed means, as the context requires, that a written document contains a signature or that the act of making a signature has occurred.

(50) Solicitation Document means an Invitation to Bid, a Request for proposals, Request for quotes, or other similar document issued to invite Offers from prospective Contractors under ORS chapter 279B or 279C. The following are not "Solicitation Documents" unless they invite Offers from prospective Contractors: a Request for Qualifications, a prequalification of bidders, a request for information, a sole-source notice, an approval of a Special procurement, or a request for product prequalification. A project-specific selection document under a Price Agreement that has resulted from a previous Solicitation Document is not itself a Solicitation Document.

(51) Solicitation file is a physical or electronic file containing documents relating to a specific procurement or procurements that is maintained in the District's procurement Division or in another District department or division that is responsible for the procurement.

(52) Specifications means, with respect to goods or services, any description of the physical or functional characteristics of, or of the nature of, goods or services to be procured by the District, including any requirement for inspecting, testing, or preparing goods or services for delivery and the quantities or qualities of materials to be furnished under the Contract. See ORS 279B.200(3). With respect to Public Improvements, "specifications" generally means any description of the result to be obtained and may, on occasion, describe the method and manner of doing the work to be performed.

(53) Superintendent means the District Superintendent or the Superintendent's designee.

(54) Uniform Guidance means 2 CFR Part 200—Uniform Administrative Requirements, Cost Principals, and Audit Requirements for Federal awards. The Uniform Guidance applies to all District Contracts funded in whole or in part by Federal award.

(55) :

(a) Veteran means an individual who Served on active duty with the Armed Forces of the United States:

(A) For a period of more than 90 consecutive days beginning on or before January 31, 1955, and was discharged or released under honorable conditions;

(B) For a period of more than 178 consecutive days beginning after January 31, 1955, and was discharged or released from active duty under honorable conditions;

(C) For 178 days or less and was discharged or released from active duty under honorable conditions because of a service-connected disability;

(D) For 178 days or less and was discharged or released from active duty under honorable conditions and has a disability rating from the United States Department of Veterans Affairs; or

(E) For at least one day in a combat zone and was discharged or released from active duty under honorable conditions;

(i) Received a combat or campaign ribbon or an expeditionary medal for service in the Armed Forces of the United States and was discharged or released from active duty under honorable conditions;

(ii) Is receiving a nonservice-connected pension from the United States Department of Veterans Affairs;

(iii) Is a disabled veteran, as defined in ORS 408.225; or

(iv) Has been a reserve officer or member of a National Guard unit for at least five years before the individual seeks a certification under ORS 200.055.

(b) As used in paragraph (a) of this subsection, "active duty" does not include attendance at a school under military orders, except schooling incident to an active enlistment or a regular tour of duty, or normal military training as a reserve officer or member of an organized reserve or a National Guard unit.

(56) Work means the furnishing of all materials, equipment, labor, and incidentals necessary to successfully complete any individual item or the entire Contract, and successful completion of all duties and obligations imposed by the Contract.

(57) Writing means letters, characters, and symbols inscribed on paper by hand, print, type, or other method of impression, intended to represent or convey particular ideas or meanings. "Writing," when required or permitted by law, or required or permitted in a Solicitation Document, also means letters, characters, and symbols made in electronic form and intended to represent or convey particular ideas or meanings.

(58) Written means existing in writing.

PPS 46-0120 Policy

The District shall conduct Public Contracting to further the policies set forth in ORS 279A.015, elsewhere in the Code, and in these rules.

PPS 46-0130 Application of the Code and Rules; Exceptions

(1) Except as set forth in this section, the District shall exercise all rights, powers, and authority related to Public Contracting in accordance with the Public Contracting Code and these rules.

(2) The District may make a procurement without competitive sealed bidding, competitive sealed Proposals, or other competition required under ORS 279B.050 through 279B.085 or PPS 47-0255 through 47-0670, provided the procurement is made under 10 U.S.C. 381, the Electronic Government Act of 2002 (P.L. 107-347), or other federal law that is, as determined by the Local Contract Review Board, similar

to 10 U.S.C. 381 or section 211 of the Electronic Government Act of 2002, in effectuating or promoting transfers of property to the District.

(3) Except as expressly provided herein, these rules do not apply to the Contracts or classes of Contracts described in ORS 279A.025(2), including the following District Contracts:

(a) Contracts between the District and:

(A) Another Contracting Agency;

(B) The Oregon Health and Science University;

(A) A public university listed in ORS 352.002;

(B) The Oregon State Bar;

(C) A governmental body of another state;

(D) The federal government;

(E) An American Indian tribe or an agency of an American Indian tribe;

(F) A nation, or a governmental body in a nation, other than the United States; or

(G) An intergovernmental entity formed between or among:

(i) Governmental bodies of this or another state;

(ii) The federal government;

(iii) An American Indian tribe or an agency of an American Indian tribe;

(iv) A nation other than the United States; or

(v) A governmental body in a nation other than the United States.

(b) Agreements authorized by ORS chapter 190 or by a statute, charter provision, ordinance, or other authority for establishing agreements between or among governmental bodies or agencies or tribal governing bodies or agencies;

(c) Insurance and service Contracts as provided for under ORS 414.115, 414.125, 414.135, and 414.145 for purposes of source selection;

(d) Grants;

(e) Contracts for professional or expert witnesses or Consultants to provide services or testimony relating to existing or potential litigation or legal matters in which a Public Body is or may become interested;

(f) Acquisitions or disposals of real property or interest in real property;

(g) Sole-source expenditures when rates are set by law or ordinance for purposes of source selection;

(h) Contracts for the procurement or distribution of textbooks;

(i) Procurements by the District from an Oregon Corrections Enterprises program;

(j) Contracts, agreements, or other documents entered into, issued, or established in connection with:

(A) The issuance of obligations, as defined in ORS 286A.100 and 287A.310, of a Public Body;

(B) Program loans and similar extensions or advances of funds, aid, or assistance that a Public Body makes to a public or private body for the purpose of carrying out, promoting, or sustaining activities or programs authorized by law; or

(C) The investment of funds by a Public Body as authorized by law, and other financial transactions of a Public Body that by their character cannot practically be established under the competitive Contractor selection procedures of ORS 279B.050 through 279B.085;

(k) Contracts for employee benefit plans as provided in ORS 243.105 (1), 243.125 (4), 243.221, 243.275, 243.291, 243.303, and 243.565;

(l) Contracts for employee benefit plans as provided in ORS 243.860 through 243.886; or

(m) Any other Public Contracting of a Public Body specifically exempted from the Code by another provision of law.

(4) Rules adopted to implement ORS 279A.200 to 279A.225 and 279B.050 to 279B.085 do not apply to Contracts made with qualified non-profit agencies providing employment opportunities for individuals with disabilities under ORS 279.835 through 279.855.

MINORITIES, WOMEN, AND EMERGING SMALL BUSINESSES

PPS 46-0210 Subcontracting to and Contracting With Emerging Small Businesses; Disqualification

(1) For the purposes of ORS 279A.105, a subcontractor certified under ORS 200.055 as an emerging small business is located in or draws its workforce from economically distressed areas if:

(a) Its principal place of business is located in an area designated as economically distressed under administrative rules adopted by the Oregon Business Development Department; or

(b) The Contractor certifies in a signed writing to the District that a substantial number of the subcontractor's employees, or subcontractors that will manufacture or provide the goods or perform the services or Personal services under the Contract reside in an area designated as economically distressed under administrative rules adopted by the Oregon Business Development Department. For the purposes of making the foregoing determination, the District shall determine in each particular instance what proportion of a Contractor's or subcontractor's employees or subcontractors constitutes a substantial number.

(2) The District shall include in each Solicitation Document a requirement that Offerors certify in their Offers, in a form prescribed by the District, that the Offeror has not discriminated and will not discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a women-owned business, an emerging small business or a veteran-owned business.

(3) Disqualification.

(a) The District may disqualify a Person from consideration for award of the District's Contracts under ORS 200.065(5), or suspend a Person's right to bid on or participate in any Contract under ORS 200.075(1), after providing the Person with notice and a reasonable opportunity to be heard in accordance with Sections (4)(b) and (c) of this rule.

(a) The District shall provide written notice to the Person of a proposed Disqualification. The District shall deliver the written notice by personal service or by registered or certified mail, return receipt requested. This notice shall:

(A) State that the District intends to disqualify or suspend the Person;

(B) Set forth the reasons for the Disqualification;

(C) Include a statement of the Person's right to a hearing if requested in writing within the time stated in the notice and that if the District does not receive the Person's written request for a hearing within the time stated, the Person shall have waived its right to a hearing;

(D) Include a statement of the authority under which the hearing will be held;

(E) Include a reference to the particular sections of the statutes and rules involved;

(F) State the proposed Disqualification period; and

(G) State that the Person may be represented by legal counsel.

(b) Hearing. The District shall schedule a hearing upon the District's receipt of the Person's timely hearing request. Within a reasonable time prior to the hearing, The District shall notify the Person of the time and place of the hearing and provide information on the procedures, right of representation, and other rights related to the conduct of the hearing. The Contract Review Board may hold the hearing or may designate a hearings officer to conduct the hearing.

(c) Notice of Disqualification. The District shall provide written notice of the Disqualification to the Person. The District shall deliver the written notice by person service or by registered or certified mail, return receipt requested. The notice shall contain:

(A) The effective date and period of Disqualification;

(B) The grounds for Disqualification; and

(C) A statement of the Person's appeal rights and applicable appeal deadlines.

(4) Contract and Subcontract Conditions. If the District awards a Contract to an Offeror that has been determined to be responsible under ORS 200.005(8)[2] and 200.045(3),[3] or awards a Contract under ORS 279A.100:[4]

(a) The District shall provide, as a material condition of the Contract:

(A) That the Contractor shall maintain its certification under ORS 200.055 throughout the term of the Contract and any extensions (if the Contracting Agency used the certification as a factor in or as a basis for the award of the Contract);

(B) That the Contractor shall promptly pay each subcontractor that is certified under ORS 200.055 in accordance with ORS 279B.220, or ORS 279C.570 and 279C.580, whichever apply to the Contract;

(C) That the Contractor shall include, in any subcontract the Contractor establishes in connection with the Contract, a provision that requires the subcontractor to maintain the subcontractor's certification under ORS 200.055 throughout the term of the subcontract and any extensions (if the Contractor used the certification as a factor in or as a basis for the award of the subcontract);

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[2] A bidder or proposer that the Governor's Policy Advisor for Economic and Business Equity determines has undertaken both a policy and a practice of actively pursuing participation by minority-owned businesses, women-owned businesses, businesses that veterans own or emerging small businesses in all of the bidder's or proposer's bids or proposals, both public and private.

[3] A bidder or proposer has made good faith efforts to encourage required participants to participate by taking all of the actions list in ORS 200.045(3).

[4] An affirmative action program adopted under ORS 279A.100 for goods and services contracts or any other contract under $50,000.

(D) That the District may require the Contractor to terminate a subcontract with a subcontractor that fails to maintain its certification under ORS 200.055 throughout the term of the subcontract and any extensions.

(b) In the administration of Contracts that are subject to section (5) of this rule, the District shall verify the Contractor's and any subcontractor's compliance with Subsection (5)(a) of this rule.

(c) Subparagraph (4)(a)(A) of this section does not apply to an emerging small business that ceases to qualify as a tier one firm or a tier two firm (as ORS 200.005 defines those terms) due to the growth in the business's number of full-time equivalent employees or in average annual gross receipts during the term of the Contract. This section (5) does not apply to an emerging small business for which a certification under ORS 200.055 expires during the term of the Contract or any extensions.

CONTRACT PREFERENCES

PPS 46-0300 Preference for Oregon Goods or Services

(1) Tiebreaker Preference and Award When Offers Identical. Under ORS 279A.120, when the District receives Offers identical in price, fitness, availability, and quality and chooses to award a Contract, the District shall award the Contract based on the following order of precedence:

(a) The District shall award the Contract to the Offeror among those submitting identical Offers who is offering goods or services, or both, or Personal services that are manufactured, produced, or to be performed in Oregon.

(b) If two or more Offerors submit identical Offers and they all offer goods or services, or both, or Personal services, that are manufactured, produced, or to be performed in Oregon, the District shall award the Contract by drawing lots among the identical Offers. The District shall provide the Offerors who submitted the identical Offers notice of the date, time, and location of the drawing of lots, and an opportunity for these Offerors to be present when the lots are drawn.

(c) If the District receives identical Offers and none of the identical Offers offer goods or services, or both, or Personal services, that are manufactured, produced, or to be performed in Oregon, then the District shall award the Contract by drawing lots among the identical Offers. The District shall provide to the Offerors who submitted the identical Offers notice of the date, time, and location of the drawing of lots, and an opportunity for these Offerors to be present when lots are drawn.

(2) Determining if Offers Are Identical. The District shall consider Offers identical in price, fitness, availability, and quality as follows:

(a) Bids received in response to an Invitation to Bid are identical in price, fitness, availability, and quality if the Bids are Responsive and offer the goods or services, or both, or Personal services, described in the Invitation to bid at the same price.

(b) Proposals received in response to a Request for proposal are identical in price, fitness, availability, and quality if they are Responsive and achieve equal scores when scored in accordance with the evaluation criteria set forth in the Request for proposal.

(c) Offers received in response to a Special procurement conducted under ORS 279B.085 are identical in price, fitness, availability, and quality if, after completing the contracting procedure approved by the Contract Review Board, the District determines, in writing, that two or more Proposals are equally advantageous to the District.

(d) Offers received in response to an intermediate procurement conducted pursuant to ORS 279B.070 are identical if the Offers equally best serve the interests of the District in accordance with ORS 279B.070(4).

(3) Determining if Goods or Services or Personal Services Are Manufactured or Produced in Oregon. In applying section (1) of this rule, the District shall determine whether a Contract is predominantly for goods, services, or Personal services and then use the predominant purpose to determine if the goods, services, or Personal services are manufactured, produced, or performed in Oregon. The District may request, either in a Solicitation Document, following Closing, or at any other time the District determines is appropriate, any information the District may need to determine if the goods, services, or Personal services are manufactured or produced in Oregon. The District may use any reasonable criteria to determine if goods, services, or Personal services are manufactured, produced, or performed in Oregon, provided that the criteria reasonably relate to that determination, and provided that the District applies those criteria equally to each Offer.

(4) Procedure for Drawing Lots. When this rule calls for the drawing of lots, the District shall draw lots by a procedure that affords each Offeror subject to the drawing a substantially equal probability of selection and that does not allow the Person making the selection the opportunity to manipulate the drawing of lots to increase the probability of selecting one Offeror over another.

(5) Discretionary Preference and Award. Under ORS 279A.128, the District may provide, in a Solicitation Document for goods, services, or Personal services, a specified percentage preference of not more than 10 percent for (i) goods fabricated or processed entirely in Oregon or services or Personal services performed entirely in Oregon or (ii) for goods or services provided by a benefit company that is incorporated, organized, formed or created under ORS 60.754 and has the majority of the benefit company's regular, full-time workforce located in this state, if the goods or services cost not more than five percent more than the goods or services available from a contractor that is not a benefit company. When the District provides for a preference under this section and more than one Offeror qualifies for the preference, the District may give a further preference to a qualifying Offeror that resides in or is headquartered in Oregon. The District may establish a preference percentage higher than 10 percent by written order that finds Good Cause to establish the higher percentage and that explains the District's reasons and evidence for finding Good Cause to establish a higher percentage. The District may not apply the preferences described in this section in a procurement for Emergency Work, minor alterations, ordinary repairs or maintenance of public improvements, or construction Work that is described in ORS 297C.320.

PPS 46-0310 Reciprocal Preferences

(1) When evaluating Bids pursuant to PPS 47-0255 through 47-0257, 49-0390, or PPS 49-0640 through 49-0660, the District shall add a percentage increase to the Bid of a Nonresident bidder equal to the percentage, if any, of the preference that would be given to that bidder in the state in which the bidder resides. The District may rely on the list prepared and maintained by the Oregon Department of Administrative services pursuant to ORS 279A.120(4) to determine whether the Nonresident bidder's state gives preference to in-state bidders and the amount of such preference.

PPS 46-0320 Preference for Recycled Materials

(1) Notwithstanding provisions of law requiring the District to award a Contract to the lowest or best Offeror, and in accordance with section (2) of this rule, the District may give preference to the procurement of goods manufactured from Recycled Materials whenever the District uses competitive sealed bidding or competitive sealed Proposals and as set forth in this rule.

(2) In comparing goods from two or more Offerors, if at least one Offeror Offers goods manufactured from Recycled Materials and at least one Offeror does not, the District may select the Offeror offering goods manufactured from Recycled Materials if each of the following four conditions exists:

(a) The Recycled Product is available;

(b) The Recycled Product meets applicable standards;

(c) The Recycled Product can be substituted for a comparable non-recycled product; and

(d) The Recycled Product's costs do not exceed the costs of non-recycled products by more than 5 percent, or a higher percentage if a written determination is made by the District and set forth in the Solicitation Document. For purposes of making the foregoing determination, the District shall consider the costs of the goods following any adjustments the District makes to the price of the goods for purposes of evaluation pursuant to PPS 46-0310.

(3) Offerors shall certify in their Offers:

(a) The minimum, if not exact, percentage of Recycled Product in all materials and supplies offered; and

(b) Both the post-consumer and Secondary Waste Content thereof.

(4) To be eligible for a preference under ORS 279A.125 and this rule:

(a) The Offeror shall indicate which materials and supplies contain verifiable recycled content; and

(b) Such products shall meet the requirements of ORS 279A.125 and this rule.

(5) A preference under ORS 279A.125 will only be applied to those products in the Offer that contain verifiable recycled content.

(6) Offers that contain false information about (a) the percentage of Recycled Product, post-consumer, and Secondary Waste Content or (b) verifiable recycled content, shall be rejected as non-responsive, and the Offeror offering false information may be deemed non-responsible.

PPS 46-0330 Solicitations and Specifications to Comply With School Board Environmental and Sustainability Policies.

The District shall develop specifications for and procure goods, services, and Public Improvements in compliance with the applicable School Board environmental and sustainability policies, including, but not limited to Board Policy 3.30.080-P (Resource Conservation), 3.30.082-P (Environmentally Sustainable Business Practices), and 8.80.010-P (High Performance Facility Design), and related Administrative Directives adopted by the Superintendent.

COOPERATIVE PROCUREMENT

PPS 46-0400 Authority for Cooperative Procurements

(1) The District may participate in, sponsor, conduct, or administer any of the following:

(a) Joint Cooperative Procurements to establish Original Contracts or Contracts for the acquisition of goods or services using a source-selection method substantially equivalent to those set forth in ORS 279B.055, 279B.060, or 279B.085, or to establish Original Contracts or Contracts for Public Improvements that use a competitive Bidding process substantially equivalent to that set forth in ORS 279C.005 through 279C.870.

(b) Permissive Cooperative Procurements to establish Original Contracts or Contracts for the acquisition of goods or services only, using a source-selection method substantially equivalent to those set forth in ORS 279B.055 or 279B.060.

(c) Interstate Cooperative Procurements to establish Original Contracts or Contracts for the acquisition of goods or services only, using a source selection method substantially equivalent to those set forth in ORS 279B.055 or 279B.060.

(2) The District shall determine, in writing, whether the Solicitation and award process for an Original Contract arising out of a Cooperative Procurement is substantially equivalent to those identified in ORS 279B.055, 279B.060, or 279B.085 in accordance with ORS 279A.200(2). This written documentation shall be maintained in the District's Solicitation file.

PPS 46-0410 Responsibilities of Administering Contracting Agencies and Purchasing Contracting Agencies

(1) If the District is an Administering Contracting Agency of a Cooperative Procurement, the District may establish the conditions under which Persons may participate in the Cooperative Procurement administered by the District. Such conditions may include, without limitation, whether each Person who participates in the Cooperative Procurement shall pay administrative fees to the Administering Contracting Agency, whether each Person shall enter into a written agreement with the District, and any other matters related to the administration of the Cooperative Procurement and the resulting Original Contract. When acting as an Administering Contracting Agency, the District may, but is not required to, include provisions in the Solicitation Document for a Cooperative Procurement and advertise the Solicitation Document in a manner to assist Purchasing Contracting Agencies' compliance with the Code or these rules.

(2) If the District is acting as a Purchasing Contracting Agency and enters into a Contract based on a Cooperative Procurement, the District shall comply with the Code and these rules, including, without limitation, those sections of the Code and these rules that govern:

- **(a)** The extent to which the Purchasing Contracting Agency may participate in the Cooperative Procurement;
- **(b)** The advertisement of the Solicitation Document related to the Cooperative Procurement; and
- **(c)** Public notice of the Purchasing Contracting Agency's intent to establish Contracts based on a Cooperative Procurement.

PPS 46-0420 Joint Cooperative Procurements

(1) **Applicability**. The District may participate in, sponsor, conduct, or administer a Joint Cooperative Procurement for the purchase of goods or services or Public Improvements. The District shall comply with the procedures set out in ORS 279A.210 and these rules to procure goods or services or Public Improvements using a Joint Cooperative Procurement. Only the Participating agencies listed in the Solicitation and original Contract Documents may enter into a Contract through a Joint Cooperative Procurement. A Joint Cooperative Procurement may not be a Permissive Cooperative Procurement.

(2) **Solicitation Requirements**. The District may administer or participate in a Joint Cooperative Procurement only if:

- **(a)** The Administering Contracting Agency's solicitation and award process for the Original Contract is an open and impartial competitive process and uses source-selection methods substantially equivalent to those specified in ORS 279B.055, 279B.060, or 279B.085, or uses a competitive Bidding process substantially equivalent to the competitive Bidding process in ORS 279C;
- **(b)** The Administering Contracting Agency's solicitation and the Original Contract or Price Agreement identifies the Cooperative Procurement Group or each participating Purchasing Contracting Agency and specifies the estimated Contract requirements; and
- **(c)** No material change is made in the terms, conditions, or prices of the Contract between the Contractor and the Purchasing Contracting Agency from the terms, conditions, and prices of the Original Contract between the Contractor and the Administering Contracting Agency.

PPS 46-0430 Permissive Cooperative Procurements

(1) Applicability. The District may only participate in, sponsor, conduct, or administer a Permissive Cooperative Procurement for the purchase of goods or services, but not for Public Improvements. The District shall comply with the procedures set out in ORS 279A.215 and these rules to procure goods or services using a Permissive Cooperative Procurement. A Permissive Cooperative Procurement is not a Joint Cooperative Procurement.

(2) Solicitation Requirements. The District may establish or participate in a Contract or Price Agreement through a Permissive Cooperative Procurement only if:

(a) The Administering Contracting Agency's solicitation and award process for the Original Contract is an open and impartial competitive process and uses source-selection methods substantially equivalent to those specified in ORS 279B.055 or 279B.060;

(b) The Administering Contracting Agency's solicitation and the Original Contract allow other Contracting Agencies to establish Contracts or Price Agreements under the terms, conditions, and prices of the Original Contract;

(c) The Contractor agrees to extend the terms, conditions, and prices of the Original Contract to the Purchasing Contracting Agency; and

(d) No material change is made in the terms, conditions, or prices of the Contract or Price Agreement between the Contractor and the Purchasing Contracting Agency from the terms, conditions, and prices of the Original Contract between the Contractor and the Administering Contracting Agency.

PPS 46-0440 Required Public Notice if Permissive Cooperative Procurement Is Over $250,000

(1) The District shall publish a notice of its intent to enter into a Contract through a Permissive Cooperative Procurement if the District estimates that it will spend in excess of $250,000 for the purchase of the goods or services to be acquired under the Contract.

(2) For purposes of determining if the District shall give a notice of intent, the District shall spend in excess of $250,000 for goods or services procured under the Contract if:

(a) The District intends to make payments, in aggregate, over the term of the Contract in excess of $250,000, whether or not the total amount or value of the payments is expressly stated in the Contract;

(b) The District's Contract expressly provides for payment, whether a fixed or maximum price, in excess of $250,000; or

(c) At the time the District enters into the Contract, the District reasonably contemplates, based on historical or other data available to the District, that the total payments it will make for the goods or services, or Personal services, under the Contract will, in aggregate, exceed $250,000 over the anticipated duration of the Contract.

(3) The notice of intent shall contain the following information:

(a) A description of the procurement;

(b) An estimated amount of the procurement;

(c) The name of the Administering Contracting Agency, and

(d) A time, place, and date by which comments shall be submitted to the District regarding the notice of intent to establish a Contract or Price Agreement through the Permissive Cooperative Procurement.

(4) The notice shall be published:

(a) At least once in at least one newspaper of general circulation in the District or electronically in the same manner as the District publishes electronic notices of Invitations to Bid or Requests for Proposals; and

(b) No fewer than seven days before the deadline for submission of comments regarding the notice of intent to establish a Contract or Price Agreement through a Permissive Cooperative Procurement.

(5) Vendors shall submit comments within seven days after the notice of intent is published.

(6) If the District receives comments on its intent to establish a Contract, the District shall, prior to establishing a Contract or Price Agreement:

(a) Make a written determination that establishing a Contract is in the best interest of the District.

(b) Provide a copy of the written determination to all vendors that submitted comments.

PPS 46-0450 Interstate Cooperative Procurements

(1) Applicability. The District may only participate in an Interstate Cooperative Procurement for the purchase of goods or services pursuant to ORS 279A.220 and these rules to procure goods or services, but not Public Improvements.

(2) Solicitation Requirements. The District may establish a Contract or Price Agreement through an Interstate Cooperative Procurement only if:

(a) The Administering Contracting Agency's solicitation and award process for the Original Contract is an open and impartial competitive process and uses source selection methods substantially equivalent to those specified in ORS 279B.055 or 279B.060;

(b) The Administering Contracting Agency's solicitation and the Original Contract allows other governmental bodies to establish Contracts or Price Agreements under the terms, conditions, and prices of the Original Contract; and

(c) The Administering Contracting Agency permits the Contractor to extend the use of the terms, conditions, and prices of the Original Contract to the Purchasing Contracting Agency.

PPS 46-0460 Advertisements of Interstate Cooperative Procurements

The District may only participate in an Interstate Cooperative Procurement if at least one of the following occurs:

(1) The Solicitation Document for the Interstate Cooperative Procurement lists the District, or the Cooperative Procurement Group of which the District is a member, as a party that may establish Contracts or Price Agreements under the terms, conditions, and prices of the Original Contract, and the Solicitation Document is advertised in Oregon in compliance with ORS 279B.055(4) or 279B.060(4) by:

(a) The Administering Contracting Agency;

(b) The District;

(c) The Cooperative Procurement Group, or a member of the Cooperative Procurement Group of which the District is a member; or

(d) Another Purchasing Contracting Agency that is subject to the Code, so long as such advertisement would, if given by the Purchasing Contracting Agency, comply with ORS 279B.055(4) or 279B.060(4) with respect to the Purchasing Contracting Agency.

(2) If the Solicitation Document issued by the Administering Contracting Agency was not advertised in accordance with PPS 46-0460(1), the District gives notice of its intent to enter into a Public Contract or Price Agreement based on the terms of the Interstate Cooperative Procurement.

(a) The notice of intent shall contain the following information:

(A) A description of the procurement;

(B) An estimated amount of the procurement;

(C) The name of the Administering Contracting Agency, and;

(D) A time, place, and date by which comments shall be submitted to the District regarding the notice of intent to establish a Contract or Price Agreement through the Interstate Cooperative Procurement.

(b) The notice shall be published:

(A) At least once in at least one newspaper of general circulation in the District or electronically in the same manner as the District publishes electronic notices of ITB or RFP; and

(B) No fewer than seven days before the deadline for submission of comments regarding the notice of intent to establish a Contract or Price Agreement through a Permissive Cooperative Procurement.

(c) Vendors shall submit comments within seven days after the notice of intent is published.

(d) If the District receives comments on its intent to establish a Contract, the District shall, prior to establishing a Contract or Price Agreement:

(A) Make a written determination that establishing a Contract is in the best interest of the District.

(B) Provide a copy of the written determination to all vendors that submitted comments.

PPS 46-0470 Protest and Disputes; Cooperative Procurements

(1) An Offeror or potential Offeror wishing to protest the procurement process, the contents of a Solicitation Document related to a Cooperative Procurement, or the award or proposed award of an Original Contract shall make the protest in accordance with ORS 279B.400 through 279B.425, unless the Administering Contracting Agency is not subject to the Code. If the Administering Contracting Agency is not subject to the Code, then the Offeror or potential Offeror shall make the protest in accordance with the processes and procedures established by the Administering Contracting Agency.

(2) Any other protests related to a Cooperative Procurement, or disputes related to a Contract arising out of a Cooperative Procurement, shall be made and resolved as set forth in ORS 279A.225.

(3) The failure of the District or other Purchasing Contracting Agency to exercise any rights or remedies it has under a Contract entered into through a Cooperative Procurement shall not affect the rights or remedies of the District or any other Contracting Agency that participates in the Cooperative Procurement, including the Administering Contracting Agency, and shall not prevent any other Purchasing Contracting Agency from exercising any rights or seeking any remedies that may be available to it under its own Contract arising out of the Cooperative Procurement.

PPS 46-0480 Contract Amendments; Cooperative Procurements

The District may amend a Contract entered into pursuant to a Cooperative Procurement as set forth in PPS 47-0800 or PPS 49-0910, as applicable.

PERSONAL SERVICES CONTRACTS

PPS 46-0500 Personal Services Contract Definition

(1) Pursuant to ORS 279A.055(2), a Contract for Personal services ("PSC") is a Contract primarily for the provision of Services that require specialized technical, creative, professional, or communication skills or talents, unique and specialized knowledge, or the exercise of discretionary judgment skills, and for which the quality of services depends on attributes that are unique to the service provider.

(2) PSCs that fall within the definition in section (1) of this rule include, but are not limited to, the following:

- **(a)** Contracts for services performed in a professional capacity, including services of an accountant, attorney, medical professional (e.g., doctor, dentist, nurse, counselor), information technology consultant, or broadcaster, except for Architectural, Engineering, Photogrammetric Mapping or Land Surveying services and other construction-related professional services subject to division 48 of these rules;
- **(b)** Contracts for services as an artist in the performing or fine arts, including any Person identified as a photographer, filmmaker, actor, director, painter, weaver, or sculptor;
- **(c)** Contracts for services that are specialized, creative, or research-oriented;
- **(d)** Contracts for educational services;
- **(e)** Contracts for human custodial care, child care, mental health care, health services, social and emergency services, and other human services; and
- **(f)** Contracts for other professional or technical consulting services not listed above.

(3) The Contract Review Board delegates to the Superintendent the discretion to decide whether a particular type of Contract or service falls within the definition of "Personal Services Contract" as set forth in Sections (1) and (2) of this rule.

(4) The District shall not use PSCs to obtain and pay for the services of an employee. A PSC may be used only to obtain and pay for the services of an independent Contractor.

PPS 46-0505 Personal Service Contract Formal Selection Procedures

The District shall use a formal selection procedure if the estimate contract amount of personal services contract is greater than $250,000. All formal RFP and RFQ solicitations shall comply with the requirements for competitive sealed Proposals contained in ORS 279B.060 and may be solicited, processed, and reviewed through any of the Sealed proposal procurement methods set forth in PPS 47-0260 to 47-0263.

PPS 46-0510 PSC Informal Selection Procedures

The District may use an informal selection process to obtain Personal services when a formal selection process is not required.

(1) The informal selection process shall solicit responses/Proposals from at least three qualified Contractors offering the required services. If three Proposals are not reasonably available, fewer will suffice, but the District shall make a written record of the effort made to obtain at least three Proposals.

(2) The informal selection process is intended to be competitive. The selection and ranking may be based on criteria including, but not limited to, each Proposer's:

- **(a)** Particular capability to perform the services required;
- **(b)** Experienced staff available to perform the services required, including each Proposer's recent, current, and projected workloads;
- **(c)** Performance history;
- **(d)** Approach and philosophy used in providing services;

(e) Fees or costs;

(f) Geographic proximity to the project or the area where the services are to be performed; and

(g) Work volume previously awarded by the District, with the object of effecting an equitable distribution of Contracts among qualified Contractors. But distribution shall not violate the policy of selecting the most highly qualified Contractor to perform the services at a fair and reasonable price.

Written confirmation of solicitation attempts and responses with Contractor names and addresses shall be maintained in the District's Solicitation file.

PPS 46-0515 Other Approved Solicitation Methods

(1) Request for Qualifications. An RFQ may be used to determine that competition does not exist for a particular service, to establish a list of qualified Contractors for RFPs or for informal solicitations under these rules, or to establish an FSCP as provided in PPS 46-0520.

(a) The RFQ shall at least describe the particular specialty desired, the qualifications the Contractor shall have in order to be considered, and the evaluation factors and their relative importance. The RFQ may require information including, but not limited to, the Contractor's particular capability to perform the required services; the number of experienced staff available to perform the required services, including specific qualifications and experience of personnel; a list of similar services the Contractor has completed with references concerning past performance; and any other information necessary to evaluate Contractor qualifications.

(b) A qualifications pre-submission meeting (voluntary or mandatory) may be held for all interested Contractors to discuss the proposed services. The RFQ shall include the date, time, and place of the meeting.

(c) Unless the RFQ establishes that competition does not exist or that Contracts will be individually negotiated with Contractors in an FSCP, each Contractor qualified under an RFQ will receive a notice (or other materials as appropriate) of any required services and have an opportunity to submit a proposal or Price quote in response to the District's subsequent RFP.

(2) Price Agreements. The District may enter into Price Agreements for Personal services. Such Price Agreements shall be solicited as otherwise required by these rules based on the maximum Contract amount.

(3) Cooperative Procurement. The District may contract for Personal services pursuant to a Cooperative Procurement in compliance with PPS 46-0400 to 46-0480.

PPS 46-0520 Flexible Services Contractor Pool

The Superintendent may establish an FSCP for a particular class of services where the need for such services is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly that it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

(1) Solicitation to Create an FSCP. An FSCP can be established pursuant to an RFQ, an RFP, competitive quotes, or such other method of competitive procurement as the Superintendent deems to be appropriate given the services to be procured.

(a) The Superintendent shall document in the Solicitation file the reasons for establishing an FSCP consistent with this rule. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(b) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside the designated class of Contracts to the FSCP.

(c) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(d) The solicitation may request a binding Price quote or rate that will become part of a subsequent Contract or may establish the pool based on qualification alone.

(e) The solicitation may set or limit the value of the work performed by the FSCP.

(2) Contracting for Work From an FSCP.

(a) Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform individual projects within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual projects will be offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the superintendent has offered Work to all the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer), a new random FSCP list will be generated. The Superintendent may Offer Work out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for Work that is a continuation of, addition to, or connected with Work previously performed by a Contractor on the list and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability is required. In order to make this determination, the Superintendent shall conduct an informal procurement pursuant to PPS 46-0510 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(b) An FSCP established under this section will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(c) Appointment to an FSCP does not guarantee that a Contractor will receive a particular amount of work or any Work at all.

(d) The establishment of an FSCP does not preclude the Superintendent from procuring Work that would otherwise fall within the FSCP class of work from other Contractors through any other procurement method authorized under these rules.

(e) At any time during the term of an FSCP, the Superintendent may request confirmation from a Contractor or Contractors in the pool that the Contractor continues to maintain the skills, personnel, or other capability needed to perform the class of work.

The Superintendent may procure Personal services with Contractors through direct negotiation in any of the following circumstances:

(1) The Contract Price is not more than $75,000.

(2) The Superintendent has established an FSCP pursuant to PPS 46-0520(2) for a particular class of projects, and the Contractor is on the FSCP list.

(3) The nature of the work is not project-driven but requires an ongoing, long-term relationship of knowledge and trust. Examples of such Work include insurance brokerage/agent of record services, medical services, and audit services.

(4) The Contractor possesses unique knowledge and/or expertise in a specialized service area, making competition impractical. Such services can include, but are not limited to, education services, academic and staff coaching, school sports officiation, and community relations.

(5) The Contract is for the purpose of supporting the Benson Polytechnic High School Building Construction Class, and all or a portion of the Contract Price is discounted or donated to the District.

(6) A Contract for which a non-District funding source, e.g., a Grant or a federal, state, or city contract, identifies the Contractor in the funding award or makes a funding award conditioned upon the service being performed by a specific Contractor. The following shall be documented to the Solicitation file:

(a) The name of the external funding source;

(b) The background on how the funding source selected the Contractor(s); and

(c) A copy of the funder's document naming the Contractor.

(7) A Contract where the student, parent, or other third-party participant selects the service provider and the process for selecting qualified Contractors has been approved in advance by the Director of procurement.

(8) The Contract is entered into pursuant to an emergency declared by the Superintendent.

(9) The Contract is for the provision of child care services to District students where the Contractor is paid directly by a non-District funding source (generally parents).

(10) The Contract is for the provision of tutoring to eligible District students attending private schools as per Title I.

(11) The Contract is for interim staff or temporary staffing services.

(12) The Contract is for the provision of therapeutic placement with outside agencies or programs to meet needs identified in a student's Individualized Education Program ("IEP").

(13) The Contract is for legal services. For the purposes of this section, "legal services" means attorney and paralegal services for transactional work, litigation, investigations, advice, reports, and other services requiring legal advice or work by an attorney, and includes all related costs or fees.

(1) The Contract is for services provided by those in the medical community including, but not limited to, doctors, physicians, psychologists, nurses, laboratory technicians and those with specific license or unique skill to administer treatments for the health and well-being of people."

PPS 46-0530 PSC Contract Requirements

District PSCs shall contain the mandatory Contract provisions set forth in ORS 279B.020(5), 279B.220, 279B.230, 279B.235(3), and, if the Contract involves lawn or landscape maintenance, ORS 279B.225.

PPS 46-0535 PSC Contract Amendments

(1) The District may amend any Personal services Contract if the District, in its sole discretion, determines that the amendment is within the scope of the Solicitation and that the amendment would not materially impact the field of competition for the Personal services described in the final form of the original procurement document. In making this determination, the District shall consider potential alternative methods of procuring the services contemplated under the proposed amendment. An amendment would not materially impact the field of competition for the services described in the Solicitation Document if the District reasonably believes that the number of Proposers would not significantly increase if the procurement document were re-issued to include the additional services.

(2) The District may amend any Contract if the additional services are required by reason of existing or new laws, rules, regulations, or ordinances of federal, state, or local agencies which affect performance of the Original Contract.

(3) All amendments to Contracts shall be in writing, shall be signed by an authorized representative of the Consultant and the District, and shall receive all required approvals before the amendments will be binding on the District.

(1) Amendments That Would Cause a Contract to Exceed the Superintendent's Authority. An amendment to a contract approved by the Superintendent that would cause the total Contract Price to exceed the Superintendent's delegated authority to approve contracts under PPS 45-0200 shall be approved by the School Board except as provided in PPS 45-0200(7)(b).

PROCUREMENT OF CONTRACTS FUNDED IN WHOLE OR IN PART BY FEDERAL AWARD

PPS 46-0600 General Rule: Federal Law Prevails in Case of Conflict

When a District contract involves federal funds that require compliance with federal statutes or regulations, the federal statutes and regulations govern over any conflicting provisions in these rules or the State of Oregon Public Contracting Code. See ORS 279A.030. Notwithstanding the foregoing, when both state and federal prevailing rates of wage apply to a particular, the District shall require payment not less than the higher of the applicable state or federal prevailing rate of wage. See ORS 279C.830.

PPS 46-0605 Procurements Subject to the Uniform Guidance

Procurement of contracts supported in whole or in part by Federal award are generally subject to the procurement standards set forth in the Uniform Guidance at 2 CFR 200.317 to 200.326. PPS 46-600 to 625 are intended to comply with Uniform Guidance and supersede other District procurements with regard to procurement of contracts supported in whole or in part by Federal award.

PPS 46-0610 General Procurement Standards for Contracts Subject to the Uniform Guidance

If the District contract is supported in whole or in part by a Federal award, the following provisions apply to the Contract:

(1) The District shall apply the procedures in these rules to avoid acquisition of unnecessary or duplicative items. The District shall consolidate or break out procurements when necessary to make a more economical purchase. Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other appropriate analysis to determine the most economical approach.

(2) To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the Federal government, the District is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services.

(3) The District is encouraged to use Federal excess and surplus property in lieu of purchasing new equipment and property whenever such use is feasible and reduces project costs.

(4) The District shall include value engineering clauses in contracts for construction projects of sufficient size to offer reasonable opportunities for cost reductions. Value engineering is a systematic and creative analysis of each contract item or task to ensure that its essential function is provided at the overall lower cost.

(5) The District shall award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources.

(6) The District shall maintain records sufficient to detail the history of the particular procurement. These records will include, but are not necessarily limited to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price.

(7) Time and Material Contracts

(a) The District may use a time and materials type contract only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. For the purposes of this section "time and materials type contract" means a contract whose cost to the District is the sum of:

(A) The actual cost of materials; and

(B) Direct labor hours charged at fixed hourly rates that reflect wages, general and administrative expenses, and profit.

(b) All time and materials contract shall include a ceiling price that the contractor exceeds at its own risk.

(c) The District shall conduct sufficient oversight of a time a time and materials type contract to obtain reasonable assurance that the contractor is using efficient methods and cost controls.

PPS 46-0615 Required Competition

All procurement transactions for contracts supported in whole or in part by federal award shall be conducted in a manner providing full and open competition consistent with the standards of this section.
(1) Contractors that develop or draft specifications, requirements, statements of work, and invitations to Bid or requests for proposals shall be prohibited from competing for such procurement.

(2) The District shall not unreasonable restrict competition by:

(a) Imposing unreasonable prequalification requirements;

(b) Requirement unnecessary experience and excessive bonding;

(c) Allowing or requiring non-competitive pricing practices between firms or affiliated companies;

(d) Awarding non-competitive contracts to consultants that are on retaining contracts;

(e) Allowing organizational conflicts of interest;

(f) Specifying only a brand name product instead of allowing an equal product to be offered and describing the performance or other relevant requirements of the procurement; or

(g) Taking any arbitrary action in the procurement process.

(3) The District may not apply any statutory or administratively imposed state or local geographical preferences except where allowed or mandated by applicable federal statutes. Nothing in this section preempts state licensing requirements. In addition, contracts for architectural and engineering services may include geographical location as a selection criterion provided its applications leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.

(4) A District procurement shall:

(a) Incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured, but should not be so detailed or restrict that it unduly restricts competition; and

(b) Identify all requirements that bidders or proposers shall fulfill and all other factors to be used in evaluating bids or proposals.

(5) The District shall ensure that all prequalified lists of persons, firms, or products that are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. Also, the District shall allow potential bidders to qualify during the Solicitation period.

PPS 46-0620 Procurement by Micro-Purchases

procurement by micro-purchase is the acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold. The current micro-purchase threshold is set at $10,000, but is periodically adjusted. The most current threshold is set forth at 48 CFR Subpart 2.101 (Definitions). To the extent practicable, the District shall distribute micro-purchases equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations if the District considers the price to be reasonable.

PPS 46-0625 Procurement by Small Purchase Procedures

Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold. The Simplified Acquisition threshold is set at $250,000, but is periodically adjusted. The most current threshold is set forth at 48 CFR Subpart 2.1. If small purchase procedures are used, the District shall obtain price or rate quotation from an adequate number of qualified sources.

PPS 46-0630 Procurement by Sealed Bids (Formal Advertising)

Bids are publicly solicited and a firm fixed price contract (lump sum or unit price) supported by a Federal award shall be awarded to the responsible bidder whose Bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed Bid method is the preferred method for procuring construction, if the conditions in paragraph (1) of this section apply.

(1) In order for sealed bidding to be feasible, the following conditions should be present:

(a) A complete, adequate, and realistic specification or purchase description is available;

(b) Two or more responsible bidders are willing and able to compete effectively for the business; and

(c) The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.

(2) If sealed bids are used, the following requirements apply:

(a) Bids shall be solicited from an adequate number of known suppliers, providing them sufficient response time prior to the date set for opening the bids, for local, and tribal governments, the invitation for bids shall be publicly advertised;

(b) The invitation for bids, which will include any specifications and pertinent attachments, shall define the items or services in order for the bidder to properly respond;

(c) All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids shall be opened publicly;

(d) A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs shall be considered in determining which Bid is lowest. Payment discounts will only be used to determine the low Bid when prior experience indicates that such discounts are usually taken advantage of; and

(e) Any or all bids may be rejected if there is a sound documented reason.

PPS 46-0635 Procurement by Competitive Proposals

The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids. If this method is used for contracts supported by a Federal award, the following requirements apply:

(1) Requests for proposals shall be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals shall be considered to the maximum extent practical;

(2) Proposals shall be solicited from an adequate number of qualified sources;

(3) The District shall establish a written method for conducting technical evaluations of the proposals received and for selecting recipients;

(4) Contracts shall be awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered; and

(5) The District may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby competitors' qualifications are evaluated and the most qualified competitor is selected, subject to negotiation of fair and reasonable compensation. Notwithstanding ORS 279C.100 to 279C.124 and OAR division 48, qualifications-based selection can only be used in procurement of A/E professional services.

PPS 46-0640 Procurement by Noncompetitive Proposals

procurement by noncompetitive proposals is procurement through solicitation of a proposal from only one source and may be used only for contracts supported by a Federal award when one or more of the following circumstances apply:

(1) The item is available only from a single source;

(2) The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;

(3) The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the District; or

(4) After solicitation of a number of sources, competition is determined inadequate.

PPS 46-0645 Contracting With Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms

(1) The District shall take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(2) Affirmative steps shall include:

(a) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(b) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(c) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(d) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(e) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

(f) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (a) through (f) of this section.

PPS 46-0650 Procurement of Recovered Materials

The District and its contractors shall comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

PPS 46-0655 Contract Cost and Price

(1) The District shall perform a cost or price analysis in connection with every procurement action supported by a Federal award in excess of the Simplified Acquisition Threshold including contract modifications. The District shall make independent estimates before receiving bids or proposals.

(2) The District shall negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. To establish a fair and reasonable profit, consideration shall be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.

(3) Costs or prices based on estimated costs for contracts under the Federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated prices would be allowable for the non-Federal entity under 2 CFR Subpart E—Cost Principles. The District may reference its own cost principles that comply with the Federal cost principles.

(4) The cost plus a percentage of cost and percentage of construction cost methods of contracting shall not be used.

PPS 46-0660 Federal Awarding Agency or Pass-Through Entity Review

At the request the Federal awarding agency or the pass-through entity, the District shall make available all relevant procurement documents for review as required by 2 CFR section 200.324.

PPS 46-0665 Bonding Requirements

For construction or facility improvement contracts or subcontracts supported by a Federal award exceeding the Simplified Acquisition Threshold, the Federal awarding agency or pass-through entity may accept the

bonding policy and requirements of the District provided that the Federal awarding agency or pass-through entity has made a determination that the Federal interest is adequately protected. If such a determination has not been made, the minimum requirements shall be as follows:

(1) A bid guarantee from each bidder equivalent to five percent of the Bid price. The "bid guarantee" shall consist of a firm commitment such as a bid bond, certified check, or other negotiable instrument accompanying a bid as assurance that the bidder will, upon acceptance of the bid, execute such contractual documents as may be required within the time specified.

(2) A performance bond on the part of the contractor for 100 percent of the contract price. A "performance bond" is one executed in connection with a contract to secure fulfillment of all the contractor's obligations under such contract.

(3) A payment bond on the part of the contractor for 100 percent of the contract price. A "payment bond" is one executed in connection with a contract to assure payment as required by law of all persons supplying labor and material in the execution of the work provided for in the contract.

PPS 46-0670 Mandatory Contract Provisions

In addition to other provisions required by the Federal agency or non-Federal entity, all contracts made by the District under a Federal award shall contain provisions covering the following, as applicable.

(1) Contracts for more than the Simplified Acquisition Threshold (see Subsection 5) shall address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

(2) All contracts in excess of $10,000 shall address termination for cause and for convenience by the non-Federal entity including the manner by which it will be effected and the basis for settlement.

(3) **Equal Employment Opportunity**. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 shall include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR Part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

(4) **Davis-Bacon Act, as Amended (40 U.S.C. 3141-3148)**. When required by Federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-Federal entities shall include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors shall be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors shall be required to pay wages not less than once a week. The non-Federal entity shall place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract shall be conditioned upon the acceptance of the wage determination. The non-Federal entity shall report all suspected or reported violations to the Federal awarding agency. The contracts shall also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient shall be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the

compensation to which he or she is otherwise entitled. The non-Federal entity shall report all suspected or reported violations to the Federal awarding agency.

(5) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of $100,000 that involve the employment of mechanics or laborers shall include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor shall be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic shall be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

(6) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient shall comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

(7) Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as Amended. Contracts and subgrants of amounts in excess of $150,000 shall contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations shall be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

(8) Debarment and Suspension (Executive Orders 12549 and 12689). A contract award (see 2 CFR 180.220) shall not be made to parties listed on the government-wide exclusions in the System for award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR Part 1986 Comp., p. 189) and 12689 (3 CFR Part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties Debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

(9) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). Contractors that apply or bid for an award exceeding $100,000 shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

(10) Additional Requirements of the Specific Federal Award. In addition to the requirements of this section, a specific Federal award may contain other procurement requirements or mandatory contract clauses. The District officer, employee, or agent that is responsible for procurement of a contract subject to a Federal award shall review the requirements of the specific Federal award and shall incorporate such requirements into the procurement process or proposed contract.

END OF DIVISION 46

PPS DIVISION 47

PUBLIC CONTRACTING RULES FOR CONTRACTS FOR GOODS AND/OR SERVICES OTHER THAN PERSONAL SERVICES

PPS 47-0000 Generally

These division 47 rules implement ORS 279B applicable to public procurements for goods or services, or both.

PPS 47-0250 Methods of Source Selection

(1) Except as permitted in these rules, the District shall award a Public Contract for goods or services, or both, by one of the following sourcing methods:

- **(a)** Competitive sealed bidding (also known as Invitation to Bid or ITB) pursuant to ORS 279B.055 and PPS 47-0255 and 47-0257;
- **(b)** Competitive sealed Proposals (also known as Request for proposal or RFP) pursuant to ORS 279B.060 and PPS 47-0260 through 47-0263;
- **(c)** Small procurements ($25,000 or less) pursuant to ORS 279B.065 and PPS 47-0265;
- **(d)** Intermediate procurements (more than $25,000 to $250,000) pursuant to ORS 279B.070 and PPS 47-0270;
- **(e)** Sole-source procurement pursuant to ORS 279B.075 and PPS 47-0275;
- **(f)** Emergency Procurement pursuant to ORS 279B.080 and PPS 47-0280;
- **(g)** Special procurement pursuant to ORS 279B.085 and PPS 47-0285, including the Class Special Procurements set forth in PPS 47-0288; or
- **(h)** Cooperative Procurement pursuant to ORS 279A.200 and PPS 46-0400 through 46-0480.

PPS 47-0252 Procurement of Service Contracts Over $250,000 in Compliance With ORS 279B.030 Through 279B.036

(1) Unless the District determines that it is not feasible to perform the services with the District's own personnel and resources pursuant to section (4) of this rule, before conducting a procurement of a Contract for services with an estimated Contract Price that exceeds $250,000 the District shall conduct a written cost analysis in accordance with section (2) of this rule. The cost analysis shall compare an estimate of the District's cost in performing the services with an estimate of the cost that a potential Contractor would incur in performing the services. The District may proceed with the procurement only if it determines that the District would incur more cost in performing the services with its own personnel and resources than in procuring the services from a Contractor. For the purposes of this section, "Contract for services" does not include:

- **(a)** Contracts for Personal services as defined in PPS 46-0500.
- **(b)** Contracts for services exempted from compliance with the Public Contracting Code by ORS 197.025 or other state statute.
- **(c)** Procurements for Client services as defined in OAR 125-246-0110. "Client services" means any services that directly or primarily support a Client, whether or not the Client is the recipient through the provision of voluntary or mandatory services. Client services also means any goods that are incidental or specialized in relation to any services defined in this section. Client services may include, but are not limited to (where these terms are used in another statute, they shall have that meaning):

(A) Housing, including utilities, rent, or mortgage, or assistance to pay utilities, rent, or mortgage;

(B) Sustenance, including clothing;

(C) Employment training or skills training to improve employability;

(D) Services for people with disabilities;

(E) Foster care or foster care facilities;

(F) Residential care or residential care facilities;

(G) Community housing;

(H) In-home care, including home-delivered meals;

(I) Medical care, services, and treatment, including, but not limited to:

(i) Medical, dental, hospital, psychological, psychiatric, therapy, vision;

(ii) Alcohol and drug treatment;

(iii) Smoking cessation;

(iv) Drugs, prescriptions, and non-prescriptions; or

(v) Nursing services and facilities.

(J) Transportation or relocation;

(K) Quality of life, living skills training;

(L) Personal care;

(M) Legal services and expert witness services;

(N) Religious practices, traditions, and services, separately or in any combination thereof; and

(O) Educational services. The term "Client services" does not include benefits or services provided as a condition of employment with an agency.

(2) In the cost analysis required under section (1) of this rule, the District shall consider cost factors that include the following:

(a) Cost of Using the District's Own Personnel and Resources. When estimating the District's costs of performing the services, the District shall consider cost factors that include:

(A) Salary or wage and benefit costs for District employees who would be directly involved in performing the services to the extent those costs reflect the proportion of the activity of those employees in the direct provision of services. The costs include those salary or wage and benefit costs of the employees who inspect, supervise, or monitor the performance of the services to the extent those costs reflect the proportion of the activity of those employees in the direct inspection, supervision, or monitoring of the performance of the subject services.

(B) The material costs necessary to the performance of the services, including the costs for space, energy, transportation, storage, equipment, and supplies used or consumed in the provision of the services.

(C) The costs incurred in planning for, training for, starting up, implementing, transporting, and delivering the services.

(D) Any costs related to stopping and dismantling a project or operation because the District intends to procure a limited quantity of services or to procure the services within a defined or limited period of time.

(E) The miscellaneous costs related to performing the services. These costs exclude the District's indirect overhead costs for existing salaries or wages and benefits for administrators, and costs for rent, equipment, utilities, and materials except to the extent that the costs are attributable solely to performing the services and would not exist unless the District performs the services.

(F) ORS 279B.003 (1)(a) provides that an estimate of the District's costs of performing the services includes the costs described in Sections (A) through (E) of this rule. Therefore, those costs do not constitute an exclusive list of cost information. The District may consider other reliable information that bears on the cost to the District of performing the services. For example, if the District has accounted for its actual costs for performing the services under consideration, or reasonably comparable services in a relatively recent services project, the District may consider those actual costs in making its estimate.

(b) Costs of a Potential Contractor. When estimating a Contractor's costs of performing the services, the District shall consider cost factors that include:

(A) The average or actual salary or wage and benefit costs for Contractors and employees:

(i) Who work in the industry or business most closely involved in performing the services; and

(ii) Who would be necessary and directly involved in performing the services or who would inspect, supervise, or monitor the performance of the services;

(B) The material costs necessary to the performance of the services, including costs for space, energy, transportation, storage, raw and finished materials, equipment, and supplies used or consumed in the provision of the services; and

(C) The miscellaneous costs related to performing the services, including, but not limited to, reasonably foreseeable fluctuations in the costs for the items in Sections (A) through (C) of this rule.

(D) ORS 279B.033 (1)(a) provides that an estimate of the District's costs of performing the services includes the costs described in Sections (A) through (E) of this rule. Therefore, those costs do not constitute an exclusive list of cost information. The District may consider other reliable information that bears on the cost to the District of performing the services. For example, if the District, in the reasonably near past, received Bids or Proposals for the performance of services under consideration, or reasonably comparable services, the District may consider the pricing offered in those Bids or Proposals in making its estimate. Similarly, the District may consider what it actually paid out under a Contract for the same or similar services. For the purposes of these examples, the reasonably near past is limited to Contracts, Bids or Proposals entered into or received within the five years preceding the date of the cost estimate. The District shall take into account, when considering the pricing offered in previous Bids, Proposals or Contracts, adjustments to the pricing in light of measures of market price adjustments like the consumer price indexes that apply to the services.

(1) Decision Based on Cost Comparison. After comparing the difference between the costs estimated for the District to perform the services and the estimated costs a potential Contractor would incur in performing the services under section (5)(c), the District may proceed with the procurement only if the District would

incur more cost in performing the services with the District's own personnel and resources than it would incur in procuring the services from a Contractor.

(2) Exceptions.

(a) Exception Based on Salaries or Wages and Benefits. If the sole reason that the costs estimated for the District to perform the services exceed the estimated a potential Contractor would incur in performing the services is because the average or actual salary or wage and benefit costs for Contractors and their employees estimated under section (2)(b)(A) of this rule are lower than the salary or wage and benefit costs for employees of the District estimated in section (2)(a)(A) of this rule, the District may not proceed with the procurement.

(b) Exception Based on Lack of District Personnel and Resources; Reporting. In cases in which the District determines that it would incur less cost in providing the services with the District's own personnel and resources, the District may nevertheless proceed with the procurement if, at the time the District intends to conduct a procurement, the District determines that it lacks personnel and resources to perform the services within the time the District requires them. When the District conducts a procurement under this section, the District shall:

(A) Make and keep a written determination that it lacks personnel and resources to perform the services within the time the District requires them and the basis for the District's decision to proceed with the procurement.

(B) Provide to the Contract Review Board, each calendar quarter, copies of each written cost analysis and written determination.

(3) Provision of Services by District Not Feasible. The District may proceed with a procurement of a Contract for services without conducting a cost analysis required under Sections (1) and (2) of this rule if the District makes written findings that use of the District's own personnel or resources to perform the services is not feasible. Reasons include, but are not limited to, the following.

(a) The District lacks the specialized capabilities, experience, or technical or other expertise necessary to perform the services. In making the finding, the District shall compare the District's capability, experience, or expertise in the field most closely involved in performing the services with a potential Contractor's capability, experience, or expertise in the same or a similar field.

(b) Special circumstances require the District to procure the services by Contract. Special circumstances may include, but are not limited to, the following:

(A) The terms under which the District receives a Grant or other funds for use in a procurement require the District to obtain services through an independent contractor;

(B) Other state or federal law requires the District to procure services through an independent contractor;

(C) The procurement is for services that are incidental to a Contract for purchasing or leasing real or personal property, including service and maintenance agreements for equipment that is leased or rented;

(D) The District cannot accomplish policy, administrative, or legal goals, including, but not limited to, avoiding conflicts of interest or ensuring independent or unbiased findings in cases when using the District's existing personnel or Persons that the District could hire through a regular or ordinary process would not be suitable;

(E) The procurement is for Emergency services pursuant to PPS 47-0280;

(F) The procurement is for services, the need for which is so urgent, temporary, or occasional that attempting to perform the services with the District's own personnel or resources would cause a delay that would frustrate the purpose for obtaining the services;

(G) The services that the District intends to procure will be completed within six months after the date on which the Contract for the services is executed; or

(H) Any other circumstances, conditions, or occurrences that would make the services, if performed by the District's own employees and resources, incapable of being managed, utilized, or dealt with successfully in terms of the quantity, timeliness of completion, success in obtaining desired results, or other reasonable needs of the District.

PPS 47-0255 Competitive Sealed Bidding; One-Step Solicitations Competitive Sealed Bidding

(1) Generally. The District may procure goods or services by competitive sealed bidding as set forth in ORS 279B.055. An Invitation to Bid is used to initiate a competitive sealed bidding solicitation and shall contain the information required by ORS 279B.055(2) and by section (2) of this rule. The District shall provide public notice of the competitive sealed bidding solicitation as set forth in PPS 47-0300.

(2) Invitation to Bid. In accordance with ORS 279B.055(2), an Invitation to Bid shall include the following:

(a) General Information.

(A) Notice of any pre-Offer conference as follows:

(i) The time, date, and location of any pre-Offer conference;

(ii) Whether attendance at the conference will be mandatory or voluntary; and

(iii) A provision that provides that statements made by the District's representatives at the conference are not binding on the District unless confirmed by written Addendum.

(B) A procurement description;

(C) The form and instructions for submission of Bids, including the time, date, and place that Bids are due, and any other special information, e.g., whether Bids may be submitted by electronic means (see PPS 47-0330 for required provisions of electronic Bids);

(D) The time, date, and place of Opening;

(E) Key contact information as follows:

(i) The office or location where the Solicitation Documents may be reviewed;

(ii) The name of the person designated for receipt of Bids;

(iii) The name and title of the person designated by the District as the contact person for the procurement, if different from the person designated to receive Bids.

(F) A statement that each bidder shall identify whether the bidder is a "resident bidder," as defined in ORS 279A.120(1);

(G) Bidder's certification of nondiscrimination in obtaining required subcontractors in accordance with ORS 279A.110(4). (See PPS-46-0210(2)); and

(H) How the District shall notify bidders of Addenda, and how the District shall make Addenda available (see PPS 47-0430);

(I) A time, date, and place that prequalification applications, if any, shall be filed, and the classes of work, if any, for which bidders shall be prequalified in accordance with ORS 279B.120;

(J) The following statements:

(i) "The District may cancel the procurement or reject any or all Bids in accordance with ORS 279B.100."

(ii) A statement that requires the Contractor or subcontractor to possess an asbestos abatement license if required under ORS 468A.710.

(b) District Need to Purchase. The character of the goods or services that the District is purchasing including, if applicable, a description of the acquisition, specifications, delivery or performance schedule, inspection, and acceptance requirements. As required by ORS 279B.055(2)(c), the District's description of its need to purchase shall:

(A) Identify the scope of the work to be performed under the resulting Contract, if the District awards one;

(B) Outline the anticipated duties of the Contractor under any resulting Contract;

(C) Establish the expectations for the Contractor's performance of any resulting Contract; and

(D) Unless the District for Good Cause specifies otherwise, the scope of work shall require the Contractor to meet the highest standards prevalent in the industry or business most closely involved in providing the goods or services that the District is purchasing.

(c) Bidding and Evaluation Process.

(A) The anticipated solicitation schedule, deadlines, protest process, and evaluation process;

(B) The District shall set forth objective evaluation criteria in the Solicitation Document in accordance with the requirements of ORS 279B.055(6)(a). Evaluation criteria need not be precise predictors of actual future costs, but to the extent possible, the evaluation factors shall be reasonable estimates of actual future costs based on information that the District has available concerning future use; and

(C) If the District intends to award Contracts to more than one bidder pursuant to PPS 47-0600(4)(c), the District shall identify in the Solicitation Document the manner in which it will determine the number of Contracts it will award.

(d) Applicable Preferences Pursuant to ORS 279B.055(6)(b).

(A) Preference for Oregon goods or services pursuant to ORS 279A.120 and PPS 46-0300 and PPS 46-0310; and

(B) Preference for Recycled Materials pursuant to ORS 279A.125 and PPS 46-0320.

(e) Terms and Conditions. All contractual terms and conditions in the form of Contract provisions that the District determines are applicable to the procurement. As required by ORS 279B.055(2)(h), the Contract terms and conditions shall specify the consequences of the Contractor's failure to perform the scope of work or to meet the performance standards established by the resulting Contract. Those consequences may include, but are not limited to:

(A) The District's reduction or withholding of payment under the Contract;

(B) The District's right to require the Contractor to perform, at the Contractor's expense, any additional Work necessary to perform the statement of work or to meet the performance standards established by the resulting Contract; and

(C) The District's rights, which the District may assert individually or in combination, to declare a default of the resulting Contract, to terminate the resulting Contract, and to seek damages and other relief available under the resulting Contract or applicable law.

(f) Whether Bid Security Is Required.

(g) Good Cause. For the purposes of this rule, "Good Cause" means a reasonable explanation for not requiring Contractor to meet the highest standards, and may include an explanation of circumstances that support a finding that the requirement would unreasonably limit competition or is not in the best interest of the District. The District shall document in the Solicitation file the basis for the determination of Good Cause for specification otherwise. The District shall have Good Cause to specify otherwise under the following circumstances:

(A) The use or purpose to which the goods or services will be put does not justify a requirement that the Contractor meet the highest prevalent standards in performing the Contract;

(B) Imposing express technical, standard, dimensional, or mathematical specifications will better ensure that the goods or services will be compatible with or will operate efficiently or effectively with components, equipment, parts, services, or information technology including hardware, services, or software with which the goods or services will be used, integrated, or coordinated;

(C) The circumstances of the industry or business that provides the goods or services are sufficiently volatile in terms of innovation or evolution of products, performance techniques, or scientific developments that a reliable highest prevalent standard does not exist or has not been developed;

(D) Any other circumstances in which the District's interest in achieving economy, efficiency, compatibility, or availability in the procurement of the goods or services reasonably outweighs the District's practical need for the highest prevalent standard in the applicable or closest industry or business that supplies the goods or services to be delivered under the resulting Contract.

PPS 47-0257 Competitive Multistep Sealed Bidding; Multistep Solicitations

(1) Generally. The District may procure goods or services by using multistep sealed bidding under ORS 279B.055(12).

(2) Phased Process. multistep sealed bidding is a phased procurement process that seeks information or unpriced submittals in the first phase combined with regular competitive Sealed Bidding, inviting bidders who submitted technically eligible submittals in the first phase to submit competitive sealed price Bids in the second phase. The Contract shall be awarded to the lowest Responsible bidder.

(3) Public Notice. When The District uses multistep sealed bidding, the District shall give public notice for the first phase in accordance with PPS 47-0300. Public notice is not required for the second phase. However, the District shall give notice of the second phase to all bidders, inform bidders of the right to protest Addenda issued after the initial Closing under PPS 47-0430, and inform bidders excluded from the second phase of the right, if any, to protest their exclusion under PPS 47-0720.

(4) Procedures Generally. In addition to the procedures set forth in PPS 47-0300 through 47-0490, the District shall employ the procedures set forth in this rule for multistep sealed bidding and in the Invitation to Bid.

(5) Procedure for Phase One of Multistep Sealed Bidding.

(a) Form. The District shall initiate multistep sealed bidding by issuing an Invitation to Bid in the form and manner required for competitive sealed Bids except as provided in this rule. In addition to the requirements set forth in PPS 47-0255(2), the multistep Invitation to Bid shall state:

(A) That the Solicitation is a multistep sealed Bid procurement and describe the process that the District shall use to conduct the procurement;

(B) That the District requests unpriced submittals and that the District shall consider price Bids only in the second phase and only from those bidders whose unpriced submittals are found eligible in the first phase;

(C) Whether bidders shall submit price Bids at the same time as unpriced submittals and, if so, that bidders shall submit the price Bids in a separate sealed envelope; and

(D) The criteria to be used in the evaluation of unpriced submittals.

(b) Evaluation. The District shall evaluate unpriced submittals in accordance with the criteria set forth in the Invitation to Bid.

(6) Procedure for Phase Two of Multistep Sealed Bidding.

(a) After the completion of phase one, if the District does not cancel the Solicitation, the District shall invite each eligible bidder to submit a price Bid.

(b) The District shall conduct phase two as any other competitive sealed Bid procurement except:

(A) As specifically set forth in this rule or the Invitation to Bid;

(B) No public notice need be given of the invitation to submit price Bids because such notice was previously given.

PPS 47-0260 Competitive Sealed Proposals

(1) Generally. The District may procure goods or services by competitive sealed Proposals as set forth in ORS 279B.060. The District shall use a Request for proposal to initiate a competitive sealed proposal. The Request for proposal shall contain the information required by ORS 279B.060(2) and by section (2) of this rule. The District shall provide public notice of the Request for proposal as set forth in PPS 47-0300.

(2) Request for Proposal. In accordance with the provisions required by ORS 279B.060(2), the Request for proposal shall include the following:

(a) General Information.

(A) Notice of any pre-Offer conference as follows:

(i) The time, date, and location of any pre-Offer conference;

(ii) Whether attendance at the conference will be mandatory or voluntary; and

(iii) A provision that provides that statements made by the District's representatives at the conference are not binding on the District unless confirmed by written Addendum.

(B) A procurement description.

(C) A time, date, and place that prequalification applications, if any, shall be filed, and the classes of work, if any, for which bidders shall be prequalified in accordance with ORS 279B.120.

(D) The form and instructions for submission of Proposals, and any other special information, e.g., whether Proposals may be submitted by electronic means (see PPS 47-0330 for required provisions of electronic Proposals);

(E) The time, date, and place of Opening;

(F) The office where the Solicitation Document may be reviewed;

(G) Key contact information, as follows;

(i) The name of the Person designated for receipt of Proposals.

(ii) The name and title of the person designated by the District as the contact Person for the procurement, if different from the Person designated to receive Proposals.

(H) Proposers' certification of nondiscrimination in obtaining required subcontractors in accordance with ORS 279A.110(4) (See PPS 46-210(2); and

(I) How the District shall notify Proposers of Addenda and how the District shall make Addenda available. (See PPS 47-0430.)

(J) The following statements:

(i) "The District may cancel the procurement or reject any or all Proposals in accordance with ORS 279B.100."

(ii) A statement that requires the Contractor or subcontractor to possess an asbestos abatement license if required under ORS 468A.710.

(b) District Need to Purchase. The character of the goods or services the District is purchasing including, if applicable, a description of the acquisition, specifications, delivery or performance schedule, inspection, and acceptance requirements. As required by ORS 279B.060(2)(c), the District's description of its need to purchase shall:

(A) Identify the scope of the work to be performed under the resulting Contract, if the District awards one; and

(B) Outline the anticipated duties of the Contractor under any resulting Contract; and

(C) Establish the expectations for the Contractor's performance of any resulting Contract; and

(D) Unless the Contractor under any resulting Contract will provide architectural, engineering, photogrammetric mapping, transportation planning or land surveying services or related services that are subject to ORS 279C.100 through 279C.125 or PPS 46-0500 through 46-0525, or the District for Good Cause specifies otherwise, the scope of work shall require the Contractor to meet the highest standards prevalent in the industry or business most closely involved in providing the goods or services that the District is purchasing.

(c) Proposal and Evaluation Process.

(A) The anticipated solicitation schedule, deadlines, protest process, and evaluation process.

(B) The District shall set forth selection criteria in the Solicitation Document in accordance with the requirements of ORS 279B.060(3)(e), including the relative importance of price and any other evaluation factors used to rate the Proposals in the first tier of competition, and if more than one tier of competitive evaluation may be used, a description of the process under which the Proposals will be evaluated in the subsequent tiers. Evaluation criteria need not be precise predictors of actual future costs and performance, but to the extent possible the criteria shall:

(i) Afford the District the ability to compare the Proposals and Proposers, applying the same standards of comparison to all Proposers;

(ii) Rationally reflect Proposers' abilities to perform the resulting Contract in compliance with the Contract's requirements; and

(iii) Permit the District to determine the relative pricing offered by the Proposers, and to reasonably estimate the costs to the District of entering into a Contract based on each proposal, considering information available to the District and subject to the understanding that the actual Contract costs may vary as a result of the Statement of work ultimately negotiated or the quantity of goods or services for which the District contracts.

(C) If the District's solicitation process calls for the District to establish a competitive Range, the District shall generally describe, in the Solicitation Document, the criteria or parameters that the District shall apply to determine the competitive Range. The District, however, subsequently may determine or adjust the number of Proposers in the competitive Range in accordance with PPS 47-0261(6).

(d) Applicable Preferences, including those described in ORS 279A.120, 279A.125(2), and 282.210.

(A) Preference for Oregon goods or services, pursuant to ORS 279A.120 and PPS 46-0300 and PPS 46-0310;

(B) Preference for Recycled Materials, pursuant to ORS 279A.125 and PPS 46-0320; and

(C) Performance within the state of public printing, binding, and stationery Work, pursuant to ORS 282.210.

(e) Contractual Terms and Conditions. All contractual terms and conditions the District determines are applicable to the procurement. The District's determination of contractual terms and conditions that are applicable to the procurement may take into consideration, as authorized by ORS 279B.060(3), those contractual terms and conditions the District will not include in the Request for proposal because the District either will reserve them for negotiation or will request Proposers to offer or suggest those terms or conditions. (See PPS 47-0260(3).)

(f) Consequences of Failure to Perform. As required by ORS 279B.060(2)(h), the Contract terms and conditions shall specify the consequences of the Contractor's failure to perform the scope of work or to meet the performance standards established by the resulting Contract. Those consequences may include, but are not limited to:

(A) The District's reduction or withholding of payment under the Contract;

(B) The District's right to require the Contractor to perform, at the Contractor's expense, any additional work necessary to perform the scope of work or to meet the performance standards established by the resulting Contract; and

(C) The District's rights, which the District may assert individually or in combination, to declare a default of the resulting Contract, to terminate the resulting Contract, and to seek damages and other relief available under the resulting Contract or applicable law.

(g) Whether proposal security is required.

(3) The District may include the applicable contractual terms and conditions in the form of Contract provisions or legal concepts to be included in the resulting Contract. Further, the District may specify that it will include or use Proposer’s terms and conditions that have been pre-negotiated under PPS 47-550(8), but the District may only include or use a Proposer's pre-negotiated terms and conditions in the resulting Contract to the extent that those terms and conditions do not materially conflict with the applicable Contract terms and conditions. The District shall not agree to any Proposer's terms and conditions that were expressly rejected in a solicitation protest under PPS 47-0730.

(4) For multiple award Contracts, the District may enter into Contracts with different terms and conditions with each Contractor to the extent those terms and conditions do not materially conflict with the applicable contractual terms and conditions. The District shall not agree to any Proposer's terms and conditions that were expressly rejected in a solicitation protest under PPS 47-0730.

(5) Good Cause. For the purposes of this rule, "Good Cause" means a reasonable explanation for not requiring the Contractor to meet the highest standards prevalent in the industry or business most closely involved in providing the goods or services under the Contract, and may include an explanation of circumstances that support a finding that the requirement would unreasonably limit competition or is not in the best interest of the District. The District shall document in the Solicitation file the basis for the determination of Good Cause or for specifying otherwise. The District shall have Good Cause to specify otherwise when the District determines that:

(a) The use or purpose to which the goods or services will be put does not justify a requirement that the Contractor meet the highest prevalent standards in performing the Contract;

(b) Imposing express technical, standard, dimensional, or mathematical specifications will better ensure that the goods or services will be compatible with, or will operate efficiently or effectively with, associated information technology, hardware, software, components, equipment, parts, or on-going services with which the goods or services will be used, integrated, or coordinated;

(c) The circumstances of the industry or business that provides the goods or services are sufficiently volatile in terms of innovation or evolution of products, performance techniques, or scientific developments, that a reliable highest prevalent standard does not exist or has not been developed;

(d) That other circumstances exist in which the District's interest in achieving economy, efficiency, compatibility, or availability in the procurement of the goods or services reasonably outweighs the District's practical need for the highest standard prevalent in the applicable or closest industry or business that supplies the goods or services to be delivered under the resulting Contract.

(6) Optional Proposal Requirements.

(a) As provided in the Request for proposal or in written Addenda issued thereunder, the District may conduct site tours, demonstrations, individual or group discussions, and other informational activities with Proposers before or after the opening of Proposals for the purpose of clarification to ensure full understanding of, and responsiveness to, the Solicitation requirements or to consider and respond to requests for modifications of the proposal requirements. The District shall use procedures designed to accord Proposers fair and equal treatment with respect to any opportunity for discussion and revision of Proposals.

(b) For purposes of evaluation, when provided for in the Request for proposal, the District may employ methods of Contractor selection that include, but are not limited to:

(A) An award or awards based solely on the ranking of Proposals;

(B) Discussions leading to best and final Offers, in which the District may not disclose private discussions leading to best and final Offers;

(C) Discussions leading to best and final Offers, in which the District may not disclose information derived from Proposals submitted by competing Proposers;

(D) Serial negotiations, beginning with the highest ranked Proposer;

(E) Competitive simultaneous negotiations;

(F) multi-tiered competition designed to identify, at each level, a class of Proposers that fall within a competitive Range or to otherwise eliminate from consideration a class of lower-ranked Proposers;

(G) A multistep Request for proposal requesting the submission of unpriced technical submittals, and then later issuing a Request for proposal limited to the Proposers whose technical submittals the District had determined to be qualified under the criteria set forth in the initial Request for proposal; or

(H) Any combination of methods described in this paragraph as authorized or prescribed by these rules.

(c) Revisions of Proposals may be permitted after the submission of Proposals and before award for the purpose of obtaining best Offers or best and final Offers.

(d) After the opening of Proposals, the District may issue or electronically post an Addendum to the Request for proposal that modifies the criteria, rating process, and procedure for any tier of competition before the start of the tier to which the Addendum applies. The District shall send an Addendum that is issued by a method other than electronic posting to all Proposers who are eligible to compete under the Addendum. The District shall issue or post the Addendum at least five days before the start of the subject tier of competition or as otherwise determined by the District to be adequate to allow eligible Proposers to prepare for the competition in accordance with rules adopted under ORS 279A.065.

(7) The cancellation of Requests for Proposals and the rejection of Proposals shall be in accordance with ORS 279B.100.

(8) In the Request for proposal, the District shall describe the methods by which the District shall make the results of each tier of competitive evaluation available to the Proposers who competed in the tier. The District shall include a description of the manner in which the Proposers who are eliminated from further competition may protest or otherwise object to the District's decision.

(9) The District shall issue or electronically post the notice of intent to award described in ORS 279B.135 to each Proposer who was evaluated in the final competitive tier.

(10) If a Contract is awarded, the District shall award the Contract to the responsible Proposer whose proposal the District determines in writing to be the most advantageous to the District based on the evaluation process and evaluation factors described in the Request for proposal, any applicable preferences described in ORS 279A.120 and 279A.125, and, when applicable, the outcome of any negotiations authorized by the Request for proposal. Other factors may not be used in the evaluation. When the Request for proposal specifies or authorizes the award of multiple Public Contracts, the District shall award Public Contracts to the responsible Proposers who qualify for the award of a Contract under the terms of the Request for proposal.

(11) The District may issue a request for information, a request for interest, a Request for Qualifications, or other preliminary documents to obtain information useful in the preparation of a Request for proposal.

PPS 47-0261 Procedures for Competitive Range; Multi-Tiered and Multistep Solicitations Multistep Proposals

(1) Generally. The District may use one or more, or any combination of procure goods or services employing any combination of the methods of Contractor selection set forth in ORS 279B.060(7), 279B.0608 and this rule to procure goods or services. In addition to the procedures set forth in PPS 47-0300 through 47-0490 for methods of Contractor selection, the District may provide for a multi-tiered or multistep selection process that permits award to the highest ranked Proposer at any tier or step, calls for the establishment of a competitive Range, or permits either serial or competitive simultaneous discussions or negotiations with one or more Proposers.

(2) Methods. When conducting a multi-tiered or multistep selection process, the District may use any combination or series of Proposals, discussions, negotiations, demonstrations, offers, or other means of

soliciting information from Proposers that bears on the selection of a Contractor or Contractors. In multi-tiered and multistep competitions, the District may use these means of soliciting information from prospective Proposers and Proposers in any sequence or order, and at any stage of the selection process, as determined in the discretion of the District.

(3) District May Elect to Award Contract Prior to Completion of Stages. When the District's Request for proposal prescribes a multi-tiered or multistep Contractor selection process, the District nevertheless may, at the completion of any stage in the competition and on determining the Most Advantageous Proposer (or, in multiple award situations, on determining the awardees of the Public Contracts), award a Contract (or Contracts) and conclude the procurement without proceeding to subsequent stages. The District also may, at any time, cancel the procurement under ORS 279B.100.

(4) Exclusion Protest. The District may provide, before the notice of an intent to award, an opportunity for a Proposer to protest exclusion from the competitive Range or from subsequent phases of multi-tiered or multistep sealed Proposals as set forth in PPS 47-0720.

(5) Award Protest. The District shall provide an opportunity to protest its intent to award a Contract pursuant to ORS 279B.410 and PPS 47-0740. An Affected Offeror may protest, for any of the bases set forth in PPS 47-0720(2), its exclusion from the competitive Range or from any phase of a multi-tiered or multistep sealed proposal process, or may protest an Addendum issued following initial Closing, if the District did not previously provide Proposers the opportunity to protest the exclusion or Addendum. The failure to protest shall be considered the Proposer's failure to pursue an administrative remedy made available to the Proposer by the District.

(6) Competitive Range. When the District's solicitation process conducted under ORS 279B.060(8) calls for the District to establish a competitive Range at any stage in the procurement process, the District may do so as follows:

(a) Determining Competitive Range.

(A) The District may establish a competitive Range after evaluating all Responsive Proposals in accordance with the evaluation criteria in the Request for proposal. After evaluation of all Proposals in accordance with the criteria in the Request for proposal, the District may determine and rank the Proposers in the competitive Range. Notwithstanding the foregoing, however, in instances in which the District determines that a single Proposer has a reasonable chance of being determined the most Advantageous Proposer, the District need not determine or rank Proposers in the competitive Range. In addition, notwithstanding the foregoing, the District may establish a competitive Range of all Proposers to enter into discussions to correct deficiencies in Proposals.

(B) The District may establish the number of Proposers in the competitive Range in light of whether the District's evaluation of Proposals identifies a number of Proposers who have a reasonable chance of being determined the most advantageous Proposer, or whether the evaluation establishes a natural break in the scores of Proposers that indicates that a particular number of Proposers are closely competitive or have a reasonable chance of being determined the most Advantageous Proposer.

(b) Protesting Competitive Range. The District shall provide written notice to all Proposers identifying Proposers in the competitive Range. The District may provide an opportunity for Proposers excluded from the competitive Range to protest the District's evaluation and determination of the competitive Range in accordance with PPS 47-0720.

(7) Discussions. The District may initiate oral or written discussions with all "eligible Proposers" on subject matter within the general scope of the Request for proposal. In conducting discussions, the District:

(a) Shall treat all eligible Proposers fairly and shall not favor any eligible Proposer over another;

(b) May disclose other eligible Proposers' Proposals or discussions only in accordance with ORS 279B.060(8)(b) or (c);

(c) May adjust the evaluation of a proposal as a result of discussions. The conditions, terms, or price of the proposal may be changed during the course of the discussions provided the changes are within the scope of the Request for proposal.

(d) At any time during the time allowed for discussions, the District may:

(A) Continue discussions with a particular eligible Proposer;

(B) Terminate discussions with a particular eligible Proposer and continue discussions with other eligible Proposers; or

(C) Conclude discussions with all remaining eligible Proposers and provide, to the then-eligible Proposers, notice requesting best and final Offers.

(8) Negotiations.

(a) Serial Negotiations Allowed. The District may commence serial negotiations with the highest ranked eligible Proposer or commence simultaneous negotiations with all eligible Proposers. The District may negotiate:

(A) The statement of work;

(B) The Contract Price as it is affected by negotiating the statement of work and other terms and conditions authorized for negotiation in the Request for proposal or Addenda thereto; and

(C) Any other terms and conditions reasonably related to those authorized for negotiation in the Request for proposal or Addenda thereto. Proposers shall not submit for negotiation, and a District shall not accept, alternative terms and conditions that are not reasonably related to those authorized for negotiation in the Request for proposal or any Addendum.

(b) Terminating Negotiations. At any time during discussions or negotiations the District conducts under this rule, the District may terminate discussions or negotiations with the highest ranked Proposer, or the eligible Proposer with whom it is currently discussing or negotiating, if the District reasonably believes that:

(A) The eligible Proposer is not discussing or negotiating in good faith; or

(B) Further discussions or negotiations with the eligible Proposer will not result in the parties agreeing to the terms and conditions of a Contract in a timely manner.

(c) Continuing Serial Negotiations. If the District is conducting serial negotiations and the District terminates negotiations with an eligible Proposer, the District may then commence negotiations with the next highest-scoring eligible Proposer, and continue the sequential process until the District has either:

(A) Determined to award the Contract to the eligible Proposer with whom it is currently discussing or negotiating; or

(B) Decided to cancel the procurement under ORS 279B.100.

(d) Competitive Simultaneous Negotiations. If the District chooses to conduct competitive negotiations, the District may negotiate simultaneously with competing eligible Proposers. The District:

(A) Shall treat all eligible Proposers fairly and shall not favor any eligible Proposer over another;

(B) May disclose other eligible Proposers' Proposals or the substance of negotiations with other eligible Proposers only if the District notifies all of the eligible Proposers with whom the District shall engage in negotiations of the District's intent to disclose before engaging in negotiations with any eligible Proposer.

(e) Any oral modification of a proposal resulting from negotiations shall be reduced to writing.

(9) Best and Final Offers. If the District requires best and final Offers, the District shall establish a common date and time by which eligible Proposers shall submit best and final Offers. If the District is dissatisfied with the best and final Offers, the District may make a written determination that it is in the District's best interest to conduct additional discussions, negotiations or change the District's requirements and require another submission of best and final Offers. The District shall inform all eligible Proposers that if they do not submit notice of withdrawal or another best and final Offer, their immediately previous Offers will be considered their best and final Offers. The District shall evaluate Offers as modified by the best and final Offers. The District shall conduct the evaluations as described in OAR PPS 47-0600. The District may not modify evaluation factors or their relative importance after the date and time that best and final Offers are due.

(10) Multistep Sealed Proposals. The District may procure goods or services by using multistep competitive sealed Proposals under ORS 279B.060(8)(b)(g). multistep sealed Proposals is a phased procurement process that seeks necessary information or unpriced technical Proposals in the first phase and, in the second phase, invites Proposers who submitted technically qualified Proposals to submit competitive sealed price Proposals on the technical Proposals. The District shall award the Contract to the Responsible Proposer submitting the most advantageous proposal in accordance with the terms of the Solicitation Document applicable to the second phase.

(a) Public Notice. When the District uses multistep sealed Proposals, the District shall give public notice for the first phase in accordance with PPS 47-0300. Public notice is not required for the second phase. However, the District shall give notice of the subsequent phases to all Proposers and inform any Proposers excluded from the second phase of the right, if any, to protest exclusion under PPS 47-0720.

(b) Procedure for Phase One of Multistep Sealed Proposals. The District may initiate a multistep sealed Proposals procurement by issuing a Request for proposal in the form and manner required for competitive sealed Proposals except as provided In this rule. In addition to the requirements required for competitive sealed Proposals, the multistep Request for proposal shall state:

(A) That unpriced technical Proposals are requested;

(B) That the Solicitation is a multistep sealed proposal procurement and that, in the second phase, priced Proposals will be accepted only from those Proposers whose unpriced technical Proposals are found qualified in the first phase;

(C) The criteria for the evaluation of unpriced technical Proposals; and

(D) That the goods or services being procured shall be furnished generally in accordance with the Proposer's technical proposal as found to be finally qualified and shall meet the requirements of the Request for proposal.

(c) Addenda to the Request for Proposal. After receipt of unpriced technical Proposals, Addenda to the Request for proposal shall be distributed only to Proposers who submitted unpriced technical Proposals.

(d) Receipt and Handling of Unpriced Technical Proposals. Unpriced technical Proposals need not be opened publicly.

(e) Evaluation of Unpriced Technical Proposals. Unpriced technical Proposals shall be evaluated solely in accordance with the criteria set forth in the Request for proposal.

(f) Discussion of Unpriced Technical Proposals. The District may seek clarification of a technical proposal of any Proposer who submits a qualified, or potentially qualified, technical proposal. During the course of such discussions, the District shall not disclose any information derived from one unpriced technical proposal to any other Proposer.

(g) Methods of Contractor Selection for Phase One. In conducting phase one, the District may employ any combination of the methods of Contractor selection that call for the establishment of a competitive Range or include discussions, negotiations, or best and final Offers as set forth in this rule.

(h) Procedure for Phase Two. On the completion of phase one, the District shall invite each qualified Proposer to submit price Proposals. The District shall conduct phase two as any other competitive sealed proposal procurement except as set forth in this rule.

(i) No public notice need be given of the request to submit Price Proposals because such notice was previously given.

PPS 47-0265 Small Procurements

(1) Generally. For procurements of goods or services less than or equal to the dollar amount stated in ORS 279B.065, the District may award a Contract as a Small procurement in any manner the District deems practical or convenient, including by direct selection or award.

(2) Amendments. The District may amend a Contract awarded as a Small procurement in accordance with PPS 47-0800.

(3) No Fragmentation. A procurement may not be artificially divided or fragmented so as to constitute a Small procurement. See ORS 279B.065(2).

PPS 47-0270 Intermediate Procurements

(1) Generally. For procurements of goods or services greater than the dollar amount stated in ORS 279B.065 and less than or equal to the higher dollar amount stated in ORS 279B.070, the District may award a Contract as an intermediate procurement pursuant to ORS 279B.070.

(2) Intermediate Solicitation Process. When conducting an intermediate procurement, the District shall seek at least three informally solicited competitive Price quotes or competitive Proposals from prospective Contractors. The District 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 District shall make a written record of the effort made to obtain the quotes or Proposals.

(3) Negotiations. The District may negotiate with a prospective Contractor who offers to provide goods or services in response to an intermediate procurement to clarify its quote or Offer or to effect modifications that will make the quote or Offer more Advantageous to the District.

(4) Award. If a Contract is awarded, the District shall award the Contract to the Offeror whose quote or proposal will best serve the interests of the District, taking into account price as well as considerations including, but not limited to, experience, expertise, product functionality, suitability for a particular purpose, and Contractor responsibility under ORS 279B.110.

(5) Amendments. The District may amend a Contract awarded as an intermediate procurement in accordance with PPS 47-0800.

(6) No Fragmentation. A procurement may not be artificially divided or fragmented so as to constitute an intermediate procurement. See ORS 279B.070(2).

PPS 47-0275 Sole-Source Procurements

(1) Generally. The Superintendent is delegated the authority to determine whether goods and service or a class of goods or services are available from only one source pursuant to ORS 279B.075. The Superintendent's determination shall be based on written findings that may include information that:

(a) The efficient utilization of existing goods or services requires the acquisition of compatible goods or services;

(b) The goods or services required for the exchange of software or data with other public or private agencies are available from only one source;

(c) 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.

(2) Public Notice. If the Contract amount is greater than $150,000, the District shall give public notice of the Superintendent's determination that the goods or services or class of goods or services are available from only one source. The District shall publish such notice in a manner similar to public notice of competitive sealed Bids under ORS 279B.055(4) and PPS 47-0300. The public notice shall describe the goods or services to be acquired by a sole-source procurement, identify the prospective Contractor, and include the date, time, and place that protests are due. The District shall give Affected Persons at least seven (7) days from the date of the notice of the determination that the goods or services are available from only one source to protest the sole-source determination.

(3) Protest. An Affected Person may protest the Superintendent's determination that the goods or services or class of goods or services are available from only one source in accordance with PPS 47-0710.

PPS 47-0280 Emergency Procurements

(1) Generally. The Superintendent may award a Public Contract as an Emergency Procurement. The Superintendent will document the nature of the emergency and describe the method used for selection of the particular Contractor. See ORS 279B.080.

(2) Construction Services. For Emergency Procurement of construction, the District shall ensure competition for a Contract for the Emergency Work that is reasonable and appropriate under the emergency circumstances. In conducting the procurement, the District shall set a solicitation time period that the District determines to be reasonable under the Emergency circumstances, and may issue written or oral requests for Offers or make direct appointments without competition in cases of extreme necessity. See PPS 49-0150.

SPECIAL PROCUREMENTS (CONTRACTING EXEMPTIONS)

PPS 47-0285 **Special Procurements**; Purpose and Application

The District may award a Public Contract as a Special procurement pursuant to the requirements of ORS 279B.085 without using competitive sealed bidding or competitive sealed Proposals or other competitive procedures as otherwise required by these rules. The Contract Review Board shall approve Special procurements. The Contract Review Board may approve the following two types of Special procurements:

(1) A "Class Special Procurement" is a procurement procedure for entering into a series of Contracts over time or for multiple projects based on the classification of the Contract.

(2) A "Contract-Specific Special Procurement" is a procurement procedure for the purpose of entering into a single Contract or a number of related Contracts on a one-time basis or for a single project.

PPS 47-0287 Special Procurements; Request Procedures

(1) To seek approval of an additional Special procurement, the Superintendent shall submit a written request to the Contract Review Board. The request shall describe the contracting procedure, the goods or services or class of goods or services that are the subject of the Special procurement, and the circumstances that justify the use of a Special procurement under the standards set forth in section (2) of this rule.

(2) The Contract Review Board shall review and may approve a request for a Special procurement if the Contract Review Board finds that the use of the Special procurement:

(a) Is unlikely to encourage favoritism in the awarding of Public Contracts or to substantially diminish competition for Public Contracts; and

(b) **(A)** Is reasonably expected to result in substantial cost savings to the District or to the public; or

(B) Otherwise substantially promotes the public interest in a manner that could not practicably be realized by complying with procurement requirements that would otherwise be applicable to the procurement under division 47 of these rules.

(3) The District shall give public notice of approval of a Special procurement in the manner provided in ORS 279B.055(4) and PPS 47-0300. The notice will describe the goods or services or class of goods or services subject to the Special procurement, and shall give Affected Persons at least seven days from the date of notice of the approval of the Special procurement to protest the Special procurement.

(4) An Affected person may protest the approval of a Special procurement in accordance with ORS 279B.400 and PPS 47-0700.

(5) An approved Class Special Procurement shall be added to enumerated Class Special Procurements in PPS 47-0288.

PPS 47-0288 Approved Class Special Procurements

The Contract Review Board declares the following classes of Contracts for goods or services listed in this section as Class Special Procurements for which Contracts may be awarded without compliance with the competitive procurement requirements that would otherwise be applicable to the procurement under division 47 of these rules. Unless an alternative procurement process is particularly specified in these rules, the selection procedures for such Class Special Procurements shall be as the Superintendent determines will result in a Contract that will best serve the interests of the District. Prior to utilizing a Class Special Procurement, the Superintendent will document in writing in the Solicitation file the reasons why the Contract qualifies as a Class Special Procurement under these rules, including any required findings. Except as otherwise provided in this rule, the School Board shall approve any Contracts awarded pursuant to Special procurement if the Contract Price exceeds the Superintendent's delegated authority under PPS 45-0200. The Contract Review Board hereby designates the following classes of Contracts for Special procurement:

(1) **Advertising Contracts**. The District may purchase advertising in any medium, regardless of the dollar value of the Contract. The District may sell advertising for District publications or activities, regardless of the dollar value of the Contract.

(2) **Equipment Repair/Overhaul**. The District may enter into a Public Contract for equipment repair or overhaul without competitive procurement, subject to the following conditions:

(a) Where the extent of the repair or overhaul is unknown or not easily identified; or

(b) Where service or parts requirements are unpredictable; or

(c) Service or parts required are for equipment for which specially trained personnel are required, and such personnel are available from only one source; and

(d) Conducting a competitive process is impractical. The District shall document in the Solicitation file the reasons why a competitive process was deemed to be impractical

(3) Specifications.

(a) "Or Equal" Specification.

(A) A Brand Name or Equal Specification may be used when the use of a Brand Name or Equal Specification is advantageous to the District, because the Brand Name describes the standard of quality, performance, functionality, and other characteristics of the product needed by the District.

(B) The Superintendent is entitled to determine what constitutes a product that is equal or superior to the product specified, and any such determination is final.

(C) Nothing in this section may be construed as prohibiting the Superintendent from specifying one or more comparable products as examples of the quality, performance, functionality, or other characteristics of the product needed by the District.

(b) Specifying a Particular Make or Product. A Brand Name Specification may be prepared and used only if the Superintendent determines for a solicitation or a class of solicitations that only the identified Brand Name Specification will meet the needs of the District based on one or more of the following findings:

(A) That use of a Brand Name Specification is unlikely to encourage favoritism in the awarding of Public Contracts or substantially diminish competition for Public Contracts;

(B) That use of a Brand Name Specification would result in substantial cost savings to the District;

(C) That there is only one manufacturer or seller of the product of the quality, performance, or functionality required;

(D) That the equipment or supplies being procured are used in athletic programs or physical education programs; or

(E) That efficient utilization of existing goods requires the acquisition of compatible goods or services. For the purposes of this finding, "compatibility" includes, without limitation, technical compatibility, technological equity, and equivalent ease of training, durability, and use. "Compatibility" also includes, without limitation, compatibility among equipment in a standardized technology bundle developed to deliver curriculum in a classroom.

(4) Copyrighted Materials and Creative Works. The District may directly purchase copyrighted materials or creative works regardless of dollar value if available from only one source. Examples of copyrighted materials covered by this exemption may include, but are not necessarily limited to, all adopted curriculum materials and tools in any format, including without limitation hard copy, electronic, digital or online. Examples of such curriculum material include textbooks, workbooks, curriculum kits, on-line curriculum, instructional software applications and related digital resources, assessments, assessment materials and reports. This exemption also includes reference materials in any format, including without limitation books, periodicals, audio and visual media, and non-mass-marketed software. Examples of creative works covered by this Class Special Procurement including without limitation, artwork, music, uncopyrighted writings, and similar works.

(5) Insurance and Employee Benefits. The District may purchase liability, property damage, workers' compensation, and other insurance and insurance services Contracts, and employee benefits, without competitive procurement and regardless of dollar amount, by selecting either a vendor directly or by appointing an agent of record. For the purpose of this Special procurement, "employee benefits" includes, but is not limited to, "employee benefit plans" as defined in ORS 243.105(1), plans provided through the Oregon Educators Benefits Board pursuant to ORS 243.860 through 243.886, plans provided through the School District No. 1J Health and Welfare Trust, flexible benefit plans as defined in ORS 243.221, insurance

or other benefit based on life, supplemental medical, supplemental dental, optical, accidental death or disability insurance plans, long-term care insurance, health care coverage to retired officers, employees, spouses, and children, employee assistance plans, and expense reimbursement plans.

(6) Spot Buys. This Special procurement provides a process for the District to procure products that are available for a limited period of time at "lower-than-normal" prices (also referred to as "spot buys").

(a) Regardless of dollar value and without competitive procurement, the District may purchase "spot buys."

(b) Conditions. The District may procure an unlimited dollar value of products when any of the following conditions are present:

(A) A non-exclusive mandatory-use Contract or regularly scheduled bid process already exists for the item being purchased;

(B) The proposed unit price of the item(s) to be purchased is significantly less than a comparable item's price on an existing mandatory-use Contract, recent bid, or based on obtaining at least three quotes, and the amount saved exceeds any additional administrative costs incurred to purchase the item using this Special procurement;

(C) The product being purchased has limited availability (i.e., the product may no longer be available or available at the special price upon completion of normal bid processes); or

(D) Any mandatory-use Contract currently in place for the item being purchased contain clauses allowing for the use of this Special procurement.

(c) Notwithstanding Subsection 6(b) of this section, the District may not purchase a spot buy if doing so would jeopardize fulfillment of a guaranteed minimum volume under an existing mandatory-use Contract;

(d) Documentation. Purchases may only be made under this Special procurement if the Superintendent documents to the Solicitation file that the conditions set forth in section (6)(b) apply to the proposed purchase.

(e) Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on "spot-buy" Contracts in any dollar amount, but will report the nature and amount of the Contract to the School Board as provided in PPS 45-0200(6).

(7) Price Agreements.

(a) Price Agreements may be established for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining District requirements for volume discounts, creating standardization among agencies, and reducing lead time for ordering. The Superintendent may enter into Price Agreements to purchase goods or services for an anticipated need at a predetermined price, but the Contract shall be let by a competitive procurement process pursuant to the requirements of these rules.

(b) The Superintendent may purchase the goods or services from a Contractor awarded a Price Agreement without first undertaking additional competitive solicitation up to the amount set forth in the Price Agreement.

(c) The Superintendent may use the Price Agreement entered into by another Public Agency when the Original Contract was let pursuant to PPS 46-0400 through 46-0480;

(d) The term of the Price Agreement, including renewals, may not exceed the term stated in the original solicitation.

(8) Purchase of Used Personal Property. The District may purchase used property or equipment. "Used personal property or equipment" is property or equipment that has been placed in its intended use by a previous owner or user for a time recognized in the relevant trade or industry as qualifying the personal property or equipment as "used" at the time of the District purchase. "Used personal property or equipment" generally does not include property or equipment if the District was the previous user, whether under a lease, as part of a demonstration, trial, or pilot project, or under a similar arrangement. Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on a Contract for the purchase of used personal property in any dollar amount.

(9) Sale of Used Personal Property.

(a) The Superintendent may sell used personal property without obtaining competitive Bids or quotes if a liquidation sale would bring in greater revenue to the District than would be gained through Bids. As used in this section, "surplus personal property" is property or equipment that has been determined to no longer be useful to the District. It may be property or equipment that the District has used for some time and that is fully used up or obsolete. It may be property or equipment that is the natural excess or leftover from a project, such as cable, wire, carpet, etc., that has been cut or partially used in some manner so that it cannot be returned to the supplier for a refund.

(b) For sales of surplus property valued at more than $25,000 per item or lot, the Superintendent shall attempt to obtain at least three competitive quotes. The Superintendent will keep a written record of the source and number of quotes received. If three quotes are not available, a written record shall be made of the attempt to obtain three quotes.

(c) The Superintendent may sell used personal property regardless of price via an electronic auction or sales service including, without limitation, eBay, Craigslist, or other similar Internet-based auctions or marketplaces. If the service does not otherwise provide for a competitive sales process, the Superintendent will establish a minimum bid, a time period for acceptance of Bids, and will not sell the property unless the Superintendent receives a minimum of three Bids. The sale will be awarded to the highest Responsible bidder submitting a Responsive Bid, except that the Superintendent may accept a lower bid if transportation or other costs associated with collection or delivery of the property would offset the higher bid amount.

(d) The Superintendent may sell, sell at a discount, or donate used personal property to another school district, to another Public Body, or to a nonprofit corporation that provides educational, social, or other important services to the District, District students, or families of District students.

(e) If the Superintendent determines that the used personal property has no market value, or that the market value is so low that the staff time or cost involved in selling the property is likely to exceed the value of the used personal property, the Superintendent may dispose of the property as the Superintendent determines is in the best interest of the District.

(10) Reverse Auctions.

(a) A reverse auction means a process for the purchase of goods or services from the lowest bidder. The District shall conduct reverse auctions by first publishing a solicitation that describes its requirements and Contract terms and conditions. Then the District shall solicit online Bids from all interested bidders through an Internet-based program. The solicitation shall set forth a start and end time for Bids and specify the following type of information to be disclosed to bidders during the reverse auction:

(A) The prices of the other bidders or the price of the most competitive bidder;

(B) The rank of each bidder (e.g., (i) "winning" or "not winning" or (ii) "1st, 2nd, or higher");

(C) The scores of the bidders if the District chooses to use a scoring model that weighs non-price factors in addition to price; or

(D) Any combination of (A), (B), and (C) above. Before the reverse auction commences, bidders shall be required by the District to assent to the Contract terms and conditions, either in writing or by an Internet "click" agreement. The bidders then compete for the award of a Contract by offering successively lower prices, informed by the price(s), ranks, and scores, separately or in any combination thereof, disclosed by the District. The identity of the bidders shall not be revealed during this process. Only the successively lower price(s), ranks, scores, and related details, separately or in any combination thereof, will be revealed to the participants. The District may cancel this solicitation if the District determines that it is in the District's best interest. At the end of this Bidding process, the District shall award any potential Contract to the lowest Responsible bidder, or in the case of multiple awards, lowest Responsible bidders pursuant to ORS 279A.055(10)(b). This process allows the District to test and determine the suitability of the goods or services before making the award.

(11) Software and Hardware Maintenance, Licenses, Subscriptions, Other Digital Resources and Upgrades. The Superintendent may directly enter into a Contract or renew existing Contracts for information technology and telecommunications hardware or software maintenance, software licenses and subscriptions (including for programs, applications, and other digital or electronic resources), and upgrades without competitive solicitation where the maintenance, upgrades, subscriptions, and licenses are either available from only one source or, if available from more than one provider, are obtained from the District's current provider in order to utilize the pre-existing knowledge of the vendor regarding the specifics of the District's hardware or software system. The Superintendent shall document in the Solicitation file the facts that justify either that maintenance, licenses, subscriptions, and upgrades were available from only one source or, if from more than one source, from the current vendor.

(12) Hazardous Material Abatement.

(a) The Superintendent may enter into Public Contracts without competitive procurement, regardless of dollar amount, when ordered to clean up oil or hazardous waste pursuant to the authority granted by 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.

(b) The Superintendent shall, to the extent reasonable under the circumstances, encourage competition by attempting to obtain informal quotes from potential suppliers of goods or services.

(c) The department responsible for managing or coordinating the clean-up shall submit a written description of the circumstances that require the clean-up and a copy of the DEQ order for the clean-up to the District Purchasing Department.

(d) The District Purchasing and Contracting Department shall record the measures taken under section (12)(b) 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.

(e) The District may not contract pursuant to this exemption in the absence of an order from the DEQ to clean up a site that includes a time limit that would not allow the District to hire a Contractor under normal competitive procurement procedures. Goods or services to perform other hazardous material removal or clean-up will be purchased in accordance with normal competitive procurement procedures as described in these rules and policies.

(f) Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on a Contract for hazardous material abatement in any dollar amount.

(13) Purchase of Products for Resale to Students and Staff. The District may purchase personal property for resale to students and staff without competitive procurement and regardless of dollar amount.

(14) Radio and Television Contracts for Student Activities.

(a) Generally. The Superintendent shall use a competitive procurement method (e.g., an Invitation to Bid or Request for proposal) to obtain written Bids or Proposals to provide commercial radio and television services for any student activity or District program, including athletics, if the value of the services totals more than $150,000, regardless of whether the District is paying or receiving revenue under the Contract.

(b) Specific and Ancillary Services. The Solicitation Document used to invite Bids or Proposals to furnish radio or television services to District programs shall include the minimum bidder or qualifications and service specifications and will conform to the other requirements of the "Request for proposal" rule herein. The Solicitation Document may invite interested bidders or Proposers to offer other ancillary services. Each ancillary service, if offered, shall be accompanied by a dollar value that reflects the current purchase price for the service and a description of the service and its use and application.

(c) Term of Contract. A Contract for radio or television services may be awarded for up to five years.

(15) Donated Materials or Services. The District may directly negotiate a Contract with a Person to perform services or provide goods or services regardless of dollar amount, if:

(a) The Person has agreed to donate all or a significant portion of the materials or services necessary to perform the work; and

(b) The Person enters into a license or agreement with the District whereby the Person agrees to comply with the Public Contract requirements applicable to the particular project and any requirements that the District deems necessary or beneficial to protect the District.

(16) Manufacturer Direct Supplies. The District may purchase goods directly from a manufacturer if a large-volume purchase is required and the cost from the manufacturer is the same or less than the cost the manufacturer charges to its distributor(s). procurements of this type are made on a Contract-by-Contract basis and are not Price Agreements.

(17) Benson House Program Contracts. The District may directly negotiate a Contract for goods and/or services without complying with the competitive procurement requirements of these rules where the Contract is for the purpose of supporting the Benson Polytechnic High School Building Construction Class, and all or a portion of the Contract Price is discounted or donated to the District.

(18) Purchases Under Contracts Solicited by Nonprofit Procurement Organizations of Which the District Is a Member. The District may purchase goods and/or services under a Contract or procurement solicited by a Nonprofit Procurement Organization of which it is a member. For the purposes of this Special procurement, such a procurement Organization will be considered to be an "Administering Contracting Agency" and a "Contracting Purchasing Group" under PPS 46-0400 through 46-0480. Such procurement shall otherwise comply with the requirements for permissive, joint, or Interstate Cooperative Procurements, as applicable, pursuant to PPS 46-0400 through 46-0480.

(19) Secure, Specialized Transportation for Special Needs Students. The Superintendent may contract directly for transportation services for special needs students where such transportation need requires a transportation service with skills or equipment tailored to the needs of the particular special needs student or class of special needs students. For the purposes of this Special procurement, a "special needs student" is a student with special physical, mental, developmental, or security needs such that District transportation, public transportation, or other private general transportation providers (taxicabs, town car services, charter

services, etc.) cannot provide safe, beneficial, or timely service. Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on a Contract for secure, specialized transportation, in any dollar amount.

(20) FSCP. The Superintendent may establish an FSCP for goods, services, or construction services that are not Public Improvements for a particular class of services, where the need for such services is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly that it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

(a) Solicitation to Create an FSCP. An FSCP for goods or services shall be solicited based on the total cost of the work estimated to be awarded through the FSCP during its life. If the total amount of the work is estimated to be over $150,000, the Superintendent shall use a competitive sealed Proposals process as provided in PPS 47-0260. If the total amount of the work is $150,000 or less, the FSCP may be solicited pursuant to the intermediate procurement process set forth in PPS 47-0270.

(A) The Superintendent shall document the reasons for establishing an FSCP consistent with this rule in the Solicitation file. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(B) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside the designated class of Contracts to the FSCP.

(C) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(D) The solicitation may request a binding Price quote or rate that will become part of a subsequent Contract or may establish the pool based on qualification alone.

(E) The solicitation may set or limit the value of the work to be performed by the FSCP.

(b) Contracting for Work from an FSCP. Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform certain services or provide certain goods within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual services or goods will be offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the Superintendent has offered a Contract to all of the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer), a new random FSCP list will be generated. The Superintendent may Offer a Contract to Contractors out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for goods or services that is a continuation of, addition to, or connected with goods or services previously performed by a Contractor on the list, and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work or provided the prior goods.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability or capacity is required. In order to make this

determination, the Superintendent shall conduct an intermediate procurement pursuant to PPS 47-0270 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(c) An FSCP established under this rule will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(d) Appointment to an FSCP does not guarantee that a Contractor will receive a particular amount of work or orders, or any Work or orders at all.

(e) The establishment of an FSCP does not preclude the Superintendent from procuring goods or services that would otherwise fall within the FSCP from other Contractors through any other procurement method authorized under these rules.

(f) At any time during the term of an FSCP, the Superintendent may request confirmation from a Contractor or Contractors in the pool that the Contractor continues to maintain the skills, personnel, inventory, or other capability needed to perform the class of work or provide the required goods or services.

(g) If an FSCP for construction services is reasonably estimated to include Public Works projects that will total over $50,000 during the life of the FSCP, Public Works Contracts awarded to Contractors on an FSCP list shall require the payment of prevailing wages pursuant to ORS 279C.800 through 279C.870.

(21) Contracts for Price-Regulated Items. The Superintendent may contract for the direct purchase of goods or services where the rate or price for the goods or services being purchased is established by federal, state, or local regulatory authority without competitive solicitation.

(22) Service Monopoly. The Superintendent may enter into Contracts for Work by a utility or other entity that has been granted a monopoly for services for a specific geographic area or provision of a type of service and by agreement the utility or entity is either entitled to or is required to perform the required Work.

(23) Investment Contracts. The Superintendent may contract for the investment of District funds or the borrowing of funds by the District when such investment or borrowing is contracted pursuant to statute, rule, or constitution. The Superintendent shall use competitive methods where possible to achieve the best value for the District.

(24) Rating Agency Contracts. The District may purchase the services of Moody's Investors service, Standard & Poor's, or similar rating agencies.

(25) Gasoline, Diesel Fuel, Heating Oil, Lubricants, and Asphalt. The Superintendent may purchase gasoline, diesel fuel, heating oil, lubricants, and asphalt using the intermediate procurement Process set forth in PPS 47-0270 regardless of dollar amount.

(26) Hotel, Catering, and Space Rental Contracts.

(a) The Superintendent may rent a room or meeting facility in a hotel, event space, or other venue for District purposes without competitive procurement.

(b) The Superintendent may hire a caterer without competitive procurement where use of a particular caterer or catering service is a condition of rental of a facility.

(27) Specialized Assistive Equipment for Students. The superintendent may directly procure specialized assistive equipment for students, including without limitation positioning equipment for orthopedically impaired students and assistive technology for blind/vision impaired, deaf/hard of hearing, and deaf/blind

students, and augmentative and alternative communication equipment for students who require such assistance.

(28) Service, Repair, or Maintenance Services for Products under Warranty. The superintendent may directly procure service, repair, or maintenance services from a manufacturer, dealer, or authorized service provider for a product or a system subject to a warranty when the terms of the warranty require use of a particular maintenance service provider or providers, or when the manufacturer or approved provider shall diagnose a problem because the system or part is proprietary.

PROCUREMENT PROCESS

PPS 47-0300 Public Notice of Solicitation Documents

(1) Notice of Solicitation Documents; Fee. The District shall provide public notice of every Solicitation Document in accordance with section (2) of this rule. The District may give additional notice using any method it determines appropriate to foster and promote competition, including:

(a) Mailing notice of the availability of the Solicitation Document to Persons that have expressed an interest in the District's procurements;

(b) Placing notice on the District's electronic procurement System; or

(c) Placing notice on the District's Internet World Wide Web site.

(2) Advertising. The District shall advertise every notice of a Solicitation Document as follows:

(a) The District shall publish the advertisement for Offers in accordance with the requirements of ORS 279B.055(4) and 279B.060(5) in at least one newspaper of general circulation in the District and in as many other publications as the District may determine; or

(b) The District may publish the advertisement for Offers on the District's electronic procurement System instead of publishing notice in a newspaper of general circulation required by ORS 279B.055(4) when the District determines that doing so is more cost effective.

(c) Notice shall be given at least seven days prior to the Solicitation Closing day.

(3) Content of Advertisement. All advertisements for Offers shall set forth:

(a) Where, when, how, and for how long the Solicitation Document may be obtained;

(b) A general description of the goods or services to be acquired;

(c) The interval between the first date of notice of the Solicitation Document given in accordance with Sections (2)(a) or (b) above and Closing, which shall not be less than fourteen (14) days for an Invitation to Bid and thirty (30) days for a Request for proposal, unless the District determines that a shorter interval is in the public's interest, and that a shorter interval will not substantially affect competition. However, in no event shall the interval between the first date of notice of the Solicitation Document given in accordance with section (2)(a) or (b) above and Closing be less than seven (7) days as set forth in ORS 279B.055(4)(f). The District shall document the specific reasons for the shorter public notice period in the Solicitation file;

(d) The date that Persons shall file applications for prequalification if prequalification is a requirement, and that the class of goods or services is one for which Persons shall be prequalified;

(e) The office where Contract terms, conditions, and specifications may be reviewed;

(f) The name, title, and address of the individual authorized by the District to receive Offers;

(g) The scheduled Opening; and

(h) Any other information the District deems appropriate.

(4) Posting Advertisement for Offers. The District shall post a copy of each advertisement for Offers at the principal business office of the District. An Offeror may obtain a copy of the advertisement for Offers upon request.

(5) Fees. The District may charge a fee or require a deposit for the Solicitation Document.

(6) Notice of Addenda. The District shall provide potential Offerors notice of any Addenda to a Solicitation Document in accordance with PPS 47-0430.

PPS 47-0310 Bids or Proposals Are Offers

(1) Offer and Acceptance. The Bid or proposal is the bidder's or Proposer's Offer to enter into a Contract.

(a) In competitive bidding and competitive Proposals, the Offer is always a "Firm Offer," i.e., the Offer shall be held open by the Offeror for the District's acceptance for the period specified in PPS 47-0480. The District may elect to accept the Offer at any time during the specified period, and the District's award of the Contract constitutes acceptance of the Offer and binds the Offeror to the Contract.

(b) Notwithstanding the fact that a competitive proposal is a "Firm Offer" for the period specified in PPS 47-0480, the District may elect to discuss or negotiate certain contractual provisions, as identified in these rules or in the Solicitation Document, with the Proposer. Where negotiation is permitted by the rules or the Solicitation Document, Proposers are obligated to negotiate in good faith and only on those terms or conditions that the rules or the Solicitation Document have reserved for negotiation.

(2) Contingent Offers. Except to the extent that the Proposer is authorized to propose certain terms and conditions pursuant to PPS 47-0262, a Proposer shall not make its Offer contingent upon the District's acceptance of any terms or conditions (including specifications) other than those contained in the Solicitation Document.

(3) Offeror's Acknowledgment. By signing and returning the Offer, the Offeror acknowledges it has read and understands the terms and conditions contained in the Solicitation Document and that it accepts and agrees to be bound by the terms and conditions of the Solicitation Document. If the Request for proposal permits Proposers to propose alternative terms or conditions under PPS 47-0261, the Offeror's Offer includes any nonnegotiable terms and conditions, any proposed terms and conditions offered for negotiation upon and to the extent accepted by the District in writing, and Offeror's agreement to perform the scope of work and meet the performance standards set forth in the final negotiated scope of work.

PPS 47-0320 Facsimile Bids and Proposals

(1) District Authorization. The District may authorize Offerors to submit facsimile Offers. If the District determines that bid or proposal security is or will be required, the District should not authorize facsimile Offers unless the District has another method for receipt of such security. Prior to authorizing the submission of facsimile Offers, the District shall determine that the District's equipment and personnel are capable of receiving the size and volume of anticipated Offers within a short period of time. In addition, the District shall establish administrative procedures and controls:

(a) To receive, identify, record, and safeguard facsimile Offers;

(b) To ensure timely delivery of Offers to the location of Opening; and

(c) To preserve the Offers as sealed.

(2) Provisions to Be Included in Solicitation Document. In addition to all other requirements, if the District authorizes a facsimile Offer, the District shall include in the Solicitation Document the following:

(a) A provision substantially in the form of the following: "A 'facsimile Offer,' as used in this Solicitation Document, means an Offer, modification of an Offer, or withdrawal of an Offer that is transmitted to and received by the District via a facsimile machine";

(b) A provision substantially in the form of the following: "Offerors may submit facsimile Offers in response to this Solicitation Document. The entire response shall arrive at the place and by the time specified in this Solicitation Document";

(c) A provision that requires Offerors to sign their facsimile Offers;

(d) A provision substantially in the form of the following: "The District reserves the right to award the Contract solely on the basis of a facsimile Offer." However, upon the District's request the apparent successful Offeror shall promptly submit its complete original signed Offer;

(e) The data and compatibility characteristics of the District's receiving facsimile machine as follows:

(A) Telephone number; and

(B) Compatibility characteristics, e.g., make and model number, receiving speed, communications protocol; and

(f) A provision that the District is not responsible for any failure attributable to the transmission or receipt of the facsimile Offer including, but not limited to, the following:

(A) Receipt of garbled or incomplete documents;

(B) Availability or condition of the receiving facsimile machine;

(C) Incompatibility between the sending and receiving facsimile machine;

(D) Delay in transmission or receipt of documents;

(E) Failure of the Offeror to properly identify the Offer documents;

(F) Illegibility of Offer documents; and

(G) Security and confidentiality of data.

PPS 47-0330 Electronic Procurement

(1) Electronic Procurement Authorized.

(a) The District may conduct all phases of a procurement, including, without limitation, the posting of Electronic Advertisements and the receipt of electronic Offers, by electronic methods if and to the extent the District specifies in a Solicitation Document, a Request for quotes, or any other written instructions on how to participate in the procurement.

(b) The District shall open an Electronic Offer in accordance with electronic security measures in effect at the District at the time of its receipt of the Electronic Offer. Unless the District provides procedures for the secure receipt of Electronic Offers, the Person submitting the Electronic Offer assumes the risk of premature disclosure due to submission in unsealed form.

(c) The District's use of electronic signatures shall be consistent with applicable statutes and rules. The District may limit the use of, electronic methods of conducting a procurement based on the best interests of the District, as determined by the District.

(d) If the District determines that bid or proposal security is or will be required, the District should not authorize Electronic Offers unless the District has another method for receipt of such security.

(2) Rules Governing Electronic Procurements. The District shall conduct all portions of an electronic procurement in accordance with these division 47 rules, unless otherwise set forth in this rule.

(3) Preliminary Matters. As a condition of participation in an electronic procurement, the District may require potential Contractors to register with the District before the date and time on which the District shall first accept Offers, to agree to the terms, conditions, or other requirements of a Solicitation Document, or to agree to terms and conditions governing the procurement, such as procedures that the District may use to attribute, authenticate, or verify the accuracy of an Electronic Offer, or the actions that constitute an electronic signature.

(4) Offer Process. The District may specify that Persons shall submit an Electronic Offer by a particular date and time, or that Persons may submit multiple Electronic Offers during a period of time established in the Electronic Advertisement. When the District specifies that Persons may submit multiple Electronic Offers during a specified period of time, the District shall designate a time and date on which Persons may begin to submit Electronic Offers, and a time and date after which Persons may no longer submit Electronic Offers. The date and time after which Persons may no longer submit Electronic Offers need not be specified by a particular date and time, but may be specified by a description of the conditions that, when they occur, will establish the date and time after which Persons may no longer submit Electronic Offers. When the District shall accept Electronic Offers for a period of time, then at the designated date and time that the District shall first receive Electronic Offers, the District shall begin to accept real time Electronic Offers on an electronic procurement System, and shall continue to accept Electronic Offers in accordance with section (5)(b) of this rule until the date and time specified by the District, after which the District shall no longer accept Electronic Offers.

(5) Receipt of Electronic Offers.

(a) When the District conducts an electronic procurement that provides that all Electronic Offers shall be submitted by a particular date and time, the District shall receive the Electronic Offers in accordance with these division 47 rules.

(b) When the District specifies that Persons may submit multiple Electronic Offers during a period of time, the District shall accept Electronic Offers, and Persons may submit Electronic Offers, in accordance with the following:

(A) Following receipt of the first Electronic Offer after the day and time that the District first receives Electronic Offers, the District shall post on the District's Electronic Procurement System, and updated on a real-time basis, the lowest Electronic Offer price or highest ranking Electronic Officer.

(B) A Person may not increase the price set forth in an Electronic Offer after the date and time that the District first accepts Electronic Offers.

(a) A Person may withdraw an Electronic Offer only in compliance with these division 47 rules. If a Person withdraws an Electronic Offer, it may not later submit an Electronic Offer at a price higher than that set forth in the withdrawn Electronic Offer.

(6) Failure of the E-Procurement System. In the event of a failure of the District's Electronic Procurement System that interferes with the ability of Persons to submit Electronic Offers, protest, or to otherwise participate in the procurement, the District may cancel the procurement in accordance with PPS 47-0660, or may extend the date and time for receipt of Electronic Offers by providing notice of the extension immediately after the Electronic Procurement System becomes available.

BID AND PROPOSAL PREPARATION

PPS 47-0400 Offer Preparation

(1) Instructions. An Offeror shall submit and sign its Offer in accordance with the instructions set forth in the Solicitation Document. An Offeror shall initial and submit any correction or erasure to its Offer prior

to Opening in accordance with the requirements for submitting an Offer set forth in the Solicitation Document.

(2) Forms. An Offeror shall submit its Offer on the form(s) provided in the Solicitation Document, unless an Offeror is otherwise instructed in the Solicitation Document.

(3) Documents. An Offeror shall provide the District with all documents and Descriptive Literature required by the Solicitation Document.

PPS 47-0410 Offer Submission

(1) Product Samples and Descriptive Literature. The District may require Product Samples or Descriptive Literature if the District determines either is necessary or desirable to evaluate the quality, features, or characteristics of an Offer. The District shall dispose of Product Samples, or make them available for the Offeror to retrieve, in accordance with the Solicitation Document.

(2) Identification of Offers.

(a) To ensure proper identification and handling, Offers shall be submitted in a sealed envelope appropriately marked or in the envelope provided by the District, whichever is applicable. If the District permits Electronic Offers or facsimile Offers in the Solicitation Document, the Offeror may submit and identify Electronic Offers or facsimile Offers in accordance with these division 47 rules and the instructions set forth in the Solicitation Document. The District shall not consider facsimile or electronic Offers unless authorized by the Solicitation Document.

(b) The District is not responsible for Offers submitted in any manner, format, or to any delivery point other than as required in the Solicitation Document.

(3) Receipt of Offers. The Offeror is responsible for ensuring that the District receives its Offer at the required delivery point prior to the Closing, regardless of the method used to submit or transmit the Offer.

PPS 47-0420 Pre-Offer Conferences

(1) Purpose. The District may hold pre-Offer conferences with prospective Offerors prior to Closing to explain the procurement requirements, obtain information, or to conduct site inspections.

(2) Required Attendance. The District may require attendance at the pre-Offer conference as a condition for making an Offer.

(3) Scheduled Time. If the District holds a pre-Offer conference, it shall be held within a reasonable time after the Solicitation Document has been issued, but sufficiently before the Closing to allow Offerors to consider information provided at that conference.

(4) Statements Not Binding. Statements made by the District's representative at the pre-Offer conference do not change the Solicitation Document unless the District confirms such statements with a written Addendum to the Solicitation Document.

(5) District Announcement. The District shall set forth notice of any pre-Offer conference in the Solicitation Document in accordance with PPS 47-0255(2) or 47-0260(2).

PPS 47-0430 Addenda to Solicitation Document

(1) Issuance; Receipt. The District may change a Solicitation Document only by written Addenda. An Offeror shall provide written acknowledgment of receipt of all issued Addenda with its Offer, unless the District otherwise specifies in the Addenda.

(2) Notice and Distribution. The District shall notify prospective Offerors of Addenda in a manner intended to foster competition and to make prospective Offerors aware of the Addenda. The Solicitation Document shall specify how the District shall provide notice of Addenda and how the District shall make the

Addenda available before Closing, and at each subsequent step or tier of evaluation if the District shall engage in a multistep competitive sealed bidding process in accordance with PPS 47-0257, or a multi-tiered or multistep competitive sealed proposals process in accordance with PPS 47-0261. The following is an example of how the District may specify how it will provide notice of Addenda: "The District will not mail notice of Addenda, but will publish notice of any Addenda on the District's web site. Offerors should frequently check the District's Web site until Closing, i.e., at least once weekly until the week of Closing and at least once daily the week of the Closing."

(3) Timelines; Extensions.

(a) The District shall issue Addenda within a reasonable time to allow prospective Offerors to consider the Addenda in preparing their Offers. The District may extend the Closing if the District determines that prospective Offerors need additional time to review and respond to Addenda. Except to the extent justified by a countervailing public interest, the District shall not issue Addenda less than 72 hours before the Closing unless the Addendum also extends the Closing.

(b) Notwithstanding subsection (3)(a) of this rule, an Addendum that modifies the evaluation criteria, selection process, or procedure for any step or tier of competition under a multistep sealed bidding or multistep sealed Proposals process issued in accordance with PPS 47-0257 or 47-0261 shall be issued no fewer than five days before the beginning of that tier or step of competition, unless the District determines that a shorter period is sufficient to allow Offerors to prepare for that tier or step of competition. The District shall document the factors it considered in making that determination, which may include, without limitation, the scope of the changes to the Solicitation Document, the location of the remaining eligible Proposers, or whether shortening the period between issuing an Addendum and the beginning of the next tier or step of competition favors or disfavors any particular Proposer or Proposers.

(4) Request for Change or Protest. Unless a different deadline is set forth in the Addendum, an Offeror may submit a written request for change or protest to the Addendum, as provided in PPS 47-0730, by the close of the District's next business day after issuance of the Addendum, or up to the last day allowed to submit a request for change or protest of the Solicitation under PPS 47-0730, whichever date is later. If the date established in the previous sentence falls after the deadline for receiving protests to the Solicitation Document in accordance with PPS 47-0730, then the District may consider an Offeror's request for change or protest to the Addendum only, and the District shall not consider a request for change or protest to matters not added or modified by the Addendum. Notwithstanding any provision of this section (4) of this rule, the District is not required to provide a protest period for Addenda issued after initial Closing during a multi-tiered or multistep procurement process conducted pursuant to ORS 279B.055 or 279B.060.

PPS 47-0440 Pre-Closing Modification or Withdrawal of Offers

(1) Modifications. An Offeror may modify its Offer in writing prior to the Closing. An Offeror shall prepare and submit any modification to its Offer to the District in accordance with PPS 47-0400 and PPS 47-0410, unless otherwise specified in the Solicitation Document. Any modification shall include the Offeror's statement that the modification amends and supersedes the prior Offer. The Offeror shall mark the submitted modification as follows:

(a) Bid (or proposal) Modification; and

(b) Solicitation Document Number (or other identification as specified in the Solicitation Document).

(2) Withdrawals.

(a) An Offeror may withdraw its Offer by written notice submitted on the Offeror's letterhead, signed by an authorized representative of the Offeror, delivered to the individual and location specified in the Solicitation Document (or the place of Closing if no location is specified), and received by

the District prior to the Closing. The Offeror or authorized representative of the Offeror may also withdraw its Offer in person prior to the Closing upon presentation of appropriate identification and evidence of authority satisfactory to the District.

(b) The District may release an unopened Offer withdrawn under section (2)(a) of this rule to the Offeror or its authorized representative, after voiding any date and time stamp mark.

(c) The Offeror shall mark the written request to withdraw an Offer as follows:

(A) Bid (or proposal) Withdrawal; and

(B) Solicitation Document Number (or Other Identification as specified in the Solicitation Document).

(3) Documentation. The District shall include all documents relating to the modification or withdrawal of Offers in the appropriate Solicitation file.

PPS 47-0450 Receipt, Opening, and Recording of Offers; Confidentiality of Offers

(1) Receipt. The District shall electronically or mechanically time-stamp or hand-mark each Offer and any modification upon receipt. The District shall not open the Offer or modification upon receipt, but shall maintain it as confidential and secure until Opening. If the District inadvertently opens an Offer or a modification prior to the Opening, the District shall return the Offer or modification to its secure and confidential state until Opening. The District shall document the resealing for the Solicitation file (e.g., "District inadvertently opened the Offer due to improper identification of the Offer.").

(2) Opening and Recording. The District shall publicly open Offers including any modifications made to the Offer pursuant to PPS 47-0440(1). In the case of Invitations to Bid, to the extent practicable, the District shall read aloud the name of each bidder and such other information as the District considers appropriate. However, the District may withhold from disclosure information marked by the Offeror as "confidential" or a "trade secret" in accordance with ORS 279B.055(5)(c) and 279B.060(6). In the case of Requests for Proposals or voluminous Bids, if the Solicitation Document so provides, the District will not read Offers aloud.

PPS 47-0460 Late Offers, Late Withdrawals, and Late Modifications

Any Offer received after Closing is late. An Offeror's request for withdrawal or modification of an Offer received after Closing is late. The District shall not consider late Offers, withdrawals, or modifications except as permitted in PPS 47-0470 or 47-0261.

PPS 47-0470 Mistakes

(1) Generally. To protect the integrity of the competitive procurement process and to ensure fair treatment of Offerors, the District should carefully consider whether to permit waiver, correction, or withdrawal of Offers for certain mistakes.

(2) District Treatment of Mistakes. The District shall not allow an Offeror to correct or withdraw an Offer for an error in judgment. If the District discovers certain mistakes in an Offer after Opening but before the award of the Contract, the District may take the following action:

(a) The District may waive, or permit an Offeror to correct, a minor informality. A minor informality is a matter of form rather than substance that is evident on the face of the Offer, or an insignificant mistake that can be waived or corrected without prejudice to other Offerors. Examples of minor informalities include an Offeror's failure to:

(A) Return the correct number of signed Offers or the correct number of other documents required by the Solicitation Document;

(B) Sign the Offer in the designated block, provided a signature appears elsewhere in the Offer evidencing an intent to be bound; and

(C) Acknowledge receipt of an Addendum to the Solicitation Document, provided that it is clear on the face of the Offer that the Offeror received the Addendum and intended to be bound by its terms; or the Addendum involved did not affect price, quality, or delivery.

The District may correct a clerical error if the error is evident on the face of the Offer, or other documents submitted with the Offer, and the Offeror confirms the District's correction in writing. A clerical error is an Offeror's error in transcribing its Offer. Examples include typographical mistakes, errors in extending unit prices, transposition errors, arithmetical errors, instances in which the intended correct unit or amount is evident by simple arithmetic calculations (for example, a missing unit price may be established by dividing the total price for the units by the quantity of units for that item, or missing or incorrect total price for an item may be established by multiplying the unit price by the quantity when those figures are available in the Offer). Unit prices shall prevail over extended prices in the event of a discrepancy between extended prices and unit prices.

(a) The District may permit an Offeror to withdraw an Offer based on one or more clerical errors in the Offer only if the Offeror shows with objective proof and by clear and convincing evidence:

(A) The nature of the error;

(B) That the error is not a minor informality under this subsection or an error in judgment;

(C) That the error cannot be corrected or waived under subsection (b) of this section;

(D) That the Offeror acted in good faith in submitting an Offer that contained the claimed error and in claiming that the alleged error in the Offer exists;

(E) That the Offeror acted without gross negligence in submitting an Offer that contained a claimed error;

(F) That the Offeror will suffer substantial detriment if the District does not grant the Offeror permission to withdraw the Offer;

(G) That the District's or the public's status has not changed so significantly that relief from the forfeiture will work a substantial hardship on the District or the public it represents; and

(H) That the Offeror promptly gave notice of the claimed error to the District.

(b) The criteria in subsection (2)(c) of this rule shall determine whether the District will permit an Offeror to withdraw its Offer after Closing. These criteria shall apply to the question of whether the District shall permit an Offeror to withdraw its Offer without forfeiture of its bid bond (or other bid or proposal security), or without liability to the District based on the difference between the amount of the Offeror's Offer and the amount of the Contract actually awarded by the District, whether by award to the next lowest Responsive and Responsible bidder, the most advantageous Responsive and Responsible Proposer, or by resort to a new solicitation.

(3) Rejection for Mistakes. The District shall reject any Offer in which a mistake is evident on the face of the Offer and the intended correct Offer is not evident or cannot be substantiated from documents accompanying the Offer.

(4) Identification of Mistakes After Award. The procedures and criteria set forth above are Offeror's only opportunity to correct mistakes or withdraw Offers because of a mistake. Following award, an Offeror is bound by its Offer, and may withdraw its Offer or rescind a Contract entered into pursuant to this division 47 only to the extent permitted by applicable law.

PPS 47-0480 Time for District Acceptance

An Offeror's Offer is a Firm Offer, irrevocable, valid, and binding on the Offeror for not less than thirty (30) days following Closing unless otherwise specified in the Solicitation Document.

PPS 47-0490 Extension of Time for Acceptance of Offer

The District may request, orally or in writing, that Offerors extend, in writing, the time during which the District may consider their Offer(s). If an Offeror agrees to such extension, the Offer shall continue as a Firm Offer, irrevocable, valid, and binding on the Offeror for the agreed-upon extension period.

QUALIFICATIONS AND DUTIES

PPS 47-0500 Responsibility of Bidders and Proposers

(1) Determination. Before awarding a Contract, the District shall determine that the bidder submitting the lowest bid or Proposer submitting the most advantageous proposal is Responsible. The District shall use the standards set forth in ORS 279B.110 and PPS 47-0640(1)(c)(F) to determine if an Offeror is Responsible. In the event the District determines a bidder or Proposer is not Responsible, it shall prepare a written determination of non-Responsibility as required by ORS 279B.110 and shall reject the Offer.

PPS 47-0525 Qualified Products Lists

(1) Authority. The District may develop and maintain a qualified products list pursuant to ORS 279B.115 in instances in which the testing or examination of goods before initiating a procurement is necessary or desirable in order to best satisfy the requirements of the District. For purposes of this section, "goods" includes products that have associated or incidental service components, such as supplier warranty obligations or maintenance service programs.

(2) Notice. In the initial development of any qualified products list, the District shall give public notice, in accordance with PPS 47-0300, of the opportunity for potential Contractors, sellers, or suppliers to submit goods for testing and examination to determine their acceptability for inclusion on the list, and may solicit in writing representative groups of potential Contractors, sellers, or suppliers to submit goods for the testing and examination. Any potential Contractor, seller, or supplier, even though not solicited, may offer its goods for consideration.

(3) Inclusion to Be Based on Tests or Examinations. The District's inclusion of goods on a qualified products list shall be based on the results of tests or examinations. Notwithstanding any provision of ORS 192.410 through 192.505, the District may make the test or examination results public in a manner that protects the identity of the potential Contractor, seller, or supplier that offered the goods for testing or examination, including by using only numerical designations. Notwithstanding any provision of ORS 192.410 through 192.505, the District may keep confidential trade secrets, test data, and similar information provided by a potential Contractor, seller, or supplier if so requested in writing by the potential Contractor, seller, or supplier.

(4) List Does Not Constitute Prequalification. The inclusion of goods on a qualified products list does not constitute and may not be construed as a prequalification under ORS 279B.120 and 279B.125 of any prospective Contractor, seller, or supplier of goods on the qualified products list.

PPS 47-0550 Prequalification of Prospective Offerors; Pre-Negotiation of Contract Terms and Conditions

(1) Prequalification of Prospective Offerors. Pursuant to ORS 279B.120 and 279B.125, the District may prequalify prospective bidders or Proposers to submit Bids or Proposals for Public Contracts to provide particular types of goods or services.

(2) Notice of Prequalification. The District shall, in response to the receipt of a prequalification application submitted under section (1) of this rule, notify the prospective bidder or Proposer whether the prospective bidder or Proposer is qualified based on the standards of responsibility listed in section (7), the

type and nature of Contracts that the prospective bidder or Proposer is qualified to compete for and the time period for which the prequalification is valid. If the District does not prequalify a prospective bidder or Proposer as to any Contracts covered by the prequalification process, the notice shall specify which of the standards of responsibility listed in section (7) the prospective bidder or Proposer failed to meet. Unless the reasons are specified, the prospective bidder or Proposer shall be deemed to have been prequalified in accordance with the application.

(3) Revocation of Prequalification. If the District subsequently discovers that a prospective bidder or Proposer that prequalified under sections (1) and (2) of this rule is no longer qualified, the District may revoke the prequalification upon reasonable notice to the prospective bidder or Proposer, except that a revocation is invalid as to any Contract for which an advertisement for Bids or Proposals has already been issued. Notwithstanding this prohibition against revocation of prequalification, the District may determine that a prequalified Offeror is not Responsible prior to Contract award.

(4) Application. When the District permits or requires prequalification of bidders or Proposers, a prospective bidder or Proposer who wishes to prequalify shall submit a prequalification application to the District on a form prescribed by the District. Upon receipt of a prequalification application, the District shall investigate the prospective bidder or Proposer as necessary to determine whether the prospective bidder or Proposer is qualified. The determination shall be made in less than 30 days, if practicable, if the prospective bidder or Proposer requests an early decision to allow the prospective bidder or Proposer as much time as possible to prepare a bid or proposal for a Contract that has been advertised. In making its determination, the District shall consider only the applicable standards of responsibility listed in section (7). The District shall promptly notify the prospective bidder or Proposer whether the prospective bidder or Proposer is qualified.

(5) Contents of Notice. If the District finds that a prospective bidder or Proposer is qualified, the notice shall state the type and nature of Contracts that the prospective bidder or Proposer is qualified to compete for and the period of time for which the prequalification is valid. If the District finds that the prospective bidder or Proposer is not qualified as to any Contracts covered by the rule, resolution, ordinance, or other regulation, the notice shall specify the reasons given under section (7) below. To be entitled to a hearing under PPS 47-0760, a prospective bidder or Proposer shall, within three business days after receipt of the notice, notify the District that the prospective bidder or Proposer demands a hearing under PPS 47-0760.

(6) Revocation or Reissuance Process. If the District has reasonable cause to believe that there has been a substantial change in the conditions of a prequalified prospective bidder or Proposer and that the prospective bidder or Proposer is no longer qualified or is less qualified, the District may revoke or may revise and reissue the prequalification after reasonable notice to the prequalified prospective bidder or Proposer. The notice shall specify the reasons given under section (2) for revocation or revision of the prequalification of the prospective bidder or Proposer and inform the prospective bidder or Proposer of the right to a hearing under PPS 47-0760. To be entitled to a hearing under PPS 47-0760, a prospective bidder or Proposer shall, within three business days after receipt of the notice, notify the District that the prospective bidder or Proposer demands a hearing under PPS 47-0760. A revocation or revision does not apply to any Contract for which an advertisement for Bids or Proposals was issued before the date the notice of revocation or revision was received by the prequalified prospective bidder or Proposer.

(7) Standards of Responsibility. In determining whether a bidder or Proposer has met the standards of responsibility pursuant to ORS 279B.110(2), the District shall consider whether a bidder or Proposer has:

(a) Available the appropriate financial, material, equipment, facility, and personnel resources and expertise, or ability to obtain the resources and expertise, necessary to indicate the capability of the bidder or Proposer to meet all contractual responsibilities;

(b) A satisfactory record of performance. The District shall document the record of performance of a bidder or Proposer if the District finds the bidder or Proposer non-responsible under this section;

(c) A satisfactory record of integrity. The District shall document the record of integrity of a bidder or Proposer if the District finds the bidder or Proposer non-responsible under this section;

(d) Qualified legally to contract with the District;

(e) Supplied all necessary information in connection with the inquiry concerning responsibility. If a bidder or Proposer fails to promptly supply information requested by the District concerning responsibility, the District shall base the determination of responsibility on any available information or may find the bidder or Proposer non-responsible; and

(f) Not been Debarred by the District under PPS 47-0575.

(8) Pre-Negotiation. The District may pre-negotiate some or all Contract terms and conditions including prospective Proposer Contract forms such as license agreements, maintenance and support agreements, or similar documents for use in future procurements. Such pre-negotiation of Contract terms and conditions (including prospective Proposer forms) may be part of the prequalification process of a Proposer in section 1 or the pre-negotiation may be a separate process and not part of the prequalification process. Unless required as part of the prequalification process, the failure of the District and the prospective Proposer to reach agreement on pre-negotiated Contract terms and conditions does not prohibit the prospective Proposer from responding to procurements. The District may agree to different pre-negotiated Contract terms and conditions with different prospective Proposers. When the District has pre-negotiated different terms and conditions with Proposers or, when permitted, Proposers offer different terms and conditions, the District may consider the terms and conditions in the proposal evaluation process.

PPS 47-0560 Request for Qualifications ("RFQ")

For purposes of this section, an RFQ may be used without the RFQ constituting a prequalification pursuant to PPS 47-0550, if the District establishes the RFQ to determine whether competition exists to perform the needed services or to establish a nonbinding, open list of qualified Contractors in addition to the general public and in order to expand the pool of qualified Contractors, prior to issuing an RFP. If the District establishes a closed, exclusive, or binding list of qualified Contractors, then the District shall comply with section (1) of this rule. The District is not required to issue an RFQ and may elect to forego using an RFQ before issuing an RFP.

(1) Content of RFQ. At a minimum, the RFQ shall describe the particular specialty desired, the qualifications the Contractor(s) shall have in order to be considered, and the evaluation factors and their relative importance. The RFQ may require information including, but not limited to: the Contractor's particular capability to perform the required services; the number of experienced staff available to perform the required services, including specific qualifications and experience of personnel; a list of similar services the Contractor has completed, with references concerning past performance; and any other information deemed necessary by the District to evaluate Contractor qualifications. All RFQs shall:

(a) Be in writing;

(b) Provide that the District may, at any time during the Solicitation process, reject any or all Proposals or cancel the Solicitation without liability if it is in the public interest to do so; and

(c) Provide that the District is not responsible for any costs of any Proposers incurred while submitting Proposals, and that all Proposers who respond to solicitations do so solely at their own expense, unless compensation is expressly provided for in the Solicitation Document.

(2) Pre-Submission Meeting. A qualifications pre-submission meeting, voluntary or mandatory, may be held for all interested Contractors to discuss the proposed services. The RFQ shall include the date, time, and place of the meeting(s).

(3) Notice and Opportunity to Submit RFQ. Unless the RFQ establishes that competition does not exist or unless the Solicitation process is canceled or all qualification statements are rejected, all respondents

who met the published qualifications shall receive a notice, or other materials as appropriate, in addition to the general public, of any required services and have an opportunity to submit a proposal in response to the District's subsequent RFP.

PPS 47-0575 Debarment of Prospective Offerors

(1) Generally. The District may Debar prospective Offerors for the reasons of discriminating against a subcontractor in the awarding of a Contract because the subcontractor is a minority, women or emerging small business enterprise, a disadvantage business enterprise or a veteran-owned business as set forth in ORS 279A.110, or after providing notice and the opportunity for hearing as set forth in Sections (5)-(8).

(2) Responsibility. Notwithstanding the limitation on the term for Debarment in ORS 279B.130(1)(b), the District may determine that a previously Debarred Offeror is not Responsible prior to Contract award.

(3) Imputed Knowledge. The District may attribute improper conduct of a Person or their affiliate or affiliates having a contract with a prospective Offeror to the prospective Offeror for purposes of Debarment where the impropriety occurred in connection with the Person's duty for or on behalf of, or with the knowledge, approval, or acquiescence of, the prospective Offeror.

(4) Limited Participation. The District may allow a Debarred Person to participate in solicitations and Contracts on a limited basis during the Debarment period upon written determination that participation is advantageous to the District. The determination shall specify the factors on which it is based and define the extent of the limits imposed.

(5) Debarment Process. The District may Debar a prospective bidder or Proposer from consideration for award of the District's Contracts for the reasons listed in section (6) of this rule after providing the prospective bidder or Proposer with notice and a reasonable opportunity to be heard.

- **(a)** The District may not Debar a prospective bidder or Proposer under this section for more than three years.

(6) Reasons for Debarment. A prospective bidder or Proposer may be Debarred from consideration for award of the District's Contracts if:

- **(a)** The prospective bidder or Proposer has been convicted of a criminal offense as an incident in obtaining or attempting to obtain a public or private contract or subcontract or in the performance of a public or private contract or subcontract.
- **(b)** The prospective bidder or Proposer has been convicted under state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty that currently, seriously, and directly affects the prospective bidder's or Proposer's responsibility as a Contractor.
- **(c)** The prospective bidder or Proposer has been convicted under state or federal antitrust statutes.
- **(d)** The prospective bidder or Proposer has committed a violation of a Contract provision that is regarded by the District or the Construction Contractors Board to be so serious as to justify disqualification. A violation may include, but is not limited to, a failure to perform the terms of a Contract or an unsatisfactory performance in accordance with the terms of the Contract. However, a failure to perform or an unsatisfactory performance caused by acts beyond the control of the Contractor may not be considered to be a basis for Debarment.
- **(e)** The prospective bidder or Proposer does not carry workers' compensation or unemployment insurance as required by statute.

(7) Written Debarment Decision Required. The District shall issue a written decision to Debar a prospective bidder or Proposer under this section. The decision shall:

(a) State the reasons for the action taken;

(b) Inform the Debarred prospective bidder or Proposer of the appeal rights of the prospective bidder or Proposer under PPS 47-0760; and

(c) Be mailed or otherwise furnished immediately to the Debarred prospective bidder or Proposer.

(8) A prospective bidder or Proposer that wishes to appeal Debarment shall, within three business days after receipt of notice of Debarment, notify the District that the prospective bidder or Proposer appeals the Debarment as provided in PPS 47-0760.

OFFER EVALUATION AND AWARD

PPS 47-0600 Offer Evaluation and Award

(1) District Evaluation. The District shall evaluate Offers only as set forth in the Solicitation Document pursuant to ORS 279B.055(6)(a) and 279B.060(6)(b) based on the requirements set forth in the ITB or RFP, and in accordance with applicable law. The District shall not evaluate Offers using any other requirement or criterion.

(a) Evaluation of Bids.

(A) Nonresident bidders: In determining the lowest Responsive Bid, the District shall apply the reciprocal preference set forth in ORS 279A.120(2)(b) and PPS 46-0310 for nonresident bidders.

(B) Public Printing: The District shall, for the purpose of evaluating Bids, apply the public printing preference set forth in ORS 282.210 (printing shall be performed within the state).

(C) Award When Bids are Identical: If the District determines that one or more Bids are identical under PPS 46-0300, the District shall award a Contract in accordance with the procedures set forth in PPS 46-0300.

(b) Evaluation of Proposals.

(A) Award When Proposals are Identical: If the District determines that one or more Proposals are identical under PPS 46-0300, the District shall award a Contract in accordance with the procedures set forth in PPS 46-0300.

(B) Public Printing: The District shall, for the purpose of evaluating Proposals, apply the public printing preference set forth in ORS 282.210 (printing shall be performed within the state).

(c) Recycled Materials. When procuring goods, the District shall give preference for Recycled Materials as set forth in ORS 279A.125 if:

(A) The Recycled Product is available;

(B) The Recycled Product meets applicable standards:

(C) The Recycled Product can be substituted for a comparable non-recycled product; and

(D) The Recycled Product's costs do not exceed the costs of non-recycled products by more than 5 percent, or a higher percentage if the District makes a written determination.

(2) Clarification of Bids or Proposals. After Opening, the District may conduct discussions with apparent Responsive Offerors for the purpose of clarification to assure full understanding of the Bids or Proposals. All Bids or Proposals, in the District's sole discretion, needing clarification shall be accorded such an opportunity. The District shall document clarification of any Offeror's bid or proposal in the Solicitation file.

(3) Negotiations.

(a) Bids. The District shall not negotiate with any bidder. After award of the Contract, the District and Contractor may only modify the Contract in accordance with PPS 47-0800.

(b) Requests for Proposals. The District may only conduct discussions or negotiate with Proposers in accordance with ORS 279B.060(6)(b) and PPS 47-0261. After award of the Contract, the District and Contractor may only modify the Contract in accordance with PPS 47-0800.

(4) Award.

(a) General. If awarded, the District shall award the Contract to the Responsible bidder submitting the lowest Responsive Bid or the Responsible Proposer submitting the most Advantageous Responsive proposal. The District may award by item, groups of items, or the entire Offer, provided such award is consistent with the Solicitation Document and in the public interest.

(b) Multiple Items. An Invitation to Bid or Request for proposal may call for pricing of multiple items of similar or related type with award based on individual line item, group total of certain items, a "market basket" of items representative of the District's expected purchases, or grand total of all items.

(A) Multiple Awards—Bids. Notwithstanding subsection (4)(a) of this rule, the District may award multiple Contracts under an Invitation to Bid in accordance with the criteria set forth in the Invitation to Bid. Multiple awards shall not be made if a single award will meet the District's needs, including but not limited to adequate availability, delivery, service, or product compatibility and skills. A multiple award may be made if award to two or more bidders of similar goods or services is necessary for adequate availability, delivery, service or product compatibility and skills. Multiple awards may not be made for purpose of dividing the procurement into multiple solicitations, or to allow for user preference unrelated to utility or economy. A notice to prospective bidders that multiple Contracts may be awarded for any Invitation to Bid shall not preclude the District from awarding a single Contract for such Invitation to Bid.

(B) If an Invitation to Bid permits the award of multiple Contracts, the District shall specify in the Invitation to Bid the criteria it will use to choose from the multiple Contracts when purchasing goods or services.

(c) Multiple awards—Proposals.

(A) Notwithstanding subsection (4)(a) of this rule, the District may award multiple Contracts under a Request for proposal in accordance with the criteria set forth in the Request for proposal. Multiple awards shall not be made if a single award will meet the District's needs, including but not limited to adequate availability, delivery, service, or product compatibility. A multiple award may be made if award to two or more Proposers of similar goods or services is necessary for adequate availability, delivery, service or product compatibility and skills. Multiple awards may not be made for purpose of dividing the procurement into multiple solicitations, or to allow for user preference unrelated to obtaining the most Advantageous Contract. A notice to prospective Proposers that multiple Contracts may be awarded for any Request for proposal shall not preclude the District from awarding a single Contract for such Request for proposal.

(B) If a Request for proposal permits the award of multiple Contracts, the District shall specify in the Request for proposal the criteria it will use to choose from the multiple Contracts when purchasing goods or services, which may include consideration and evaluation of the Contract terms and conditions agreed to by the Contractors.

(d) Partial Awards. If after evaluation of Offers the District determines that an acceptable Offer has been received for only parts of the requirements of the Solicitation Document:

(A) The District may award a Contract for the parts of the Solicitation Document for which acceptable Offers have been received; or

(B) The District may reject all Offers and may issue a new Solicitation Document on the same or revised terms, conditions, and specifications.

(e) All or None Offers. The District may award all or none Offers if the evaluation shows an all-or-none award to be the lowest cost for Bids or the most Advantageous for Proposals of those submitted.

PPS 47-0610 Notice of Intent to Award

(1) Notice of Intent to Award. The District shall provide written notice of its intent to award to all bidders and Proposers pursuant to ORS 279B.135 at least seven (7) days before the award of a Contract, unless the District determines that circumstances justify prompt execution of the Contract, in which case the District may provide a shorter notice period. The District shall document the specific reasons for the shorter notice period in the Solicitation file.

(2) Finality. The District's award shall not be final until the later of the following:

(a) The expiration of the protest period provided pursuant to PPS 47-0740; or

(b) The District provides written responses to all timely-filed protests denying the protests and affirming the award.

PPS 47-0620 Documentation of Award

(1) Basis of Award. After award, the District shall make a record showing the basis for determining the successful Offeror as part of the District's Solicitation file.

(2) Contents of Award Record. The District's record shall include:

(a) For Bids.

(A) Bids;

(B) Completed bid tabulation sheet; and

(C) Written justification for any rejection of lower Bids.

(b) For Proposals.

(A) Proposals;

(B) The completed evaluation of the Proposals;

(C) Written justification for any rejection of higher-scoring Proposals; and

(D) If the District engaged in any of the methods of Contractor selection described in ORS 279B.060(6)(b) and PPS 47-0261, written documentation of the content of any discussions, negotiations, best and final Offers, or any other procedures the District used to select a Proposer to which the District awarded a Contract.

PPS 47-0630 Availability of Award Decisions

(1) Contract Documents. To the extent required by the Solicitation Document, the District shall deliver to the successful Offeror a Contract, a signed purchase order, Price Agreement, or other Contract documents as applicable.

(2) Availability of Award Decisions. A Person may obtain tabulations of awarded Bids or evaluation summaries of Proposals for a minimal charge in person or by submitting to the District a written request

accompanied by payment. The requesting Person shall provide the Solicitation Document number and enclose a self-addressed, stamped envelope.

(3) Availability of Solicitation Files. After notice of intent to award, the District shall make Solicitation files available in accordance with applicable law.

PPS 47-0640 Rejection of an Offer

(1) Rejection.

(a) Any solicitation or procurement described in a solicitation may be canceled, or any or all Bids or Proposals may be rejected in whole or in part, when the cancellation or rejection is in the best interest of the District as determined by the District. The reasons for the cancellation or rejection shall be made part of the Solicitation file. The District is not liable to any bidder or Proposer for any loss or expense caused by or resulting from the cancellation or rejection of a solicitation, bid, proposal, or award. ORS 279B.100.

(b) The District shall reject an Offer upon the District's finding that the Offer:

(A) Is contingent on the District's acceptance of terms and conditions (including specifications) that differ from the Solicitation Document;

(B) Takes exception to terms and conditions (including specifications) set forth in the Solicitation Document;

(C) Attempts to prevent public disclosure of matters in contravention of the terms and conditions of the Solicitation Document or in contravention of applicable law;

(D) Offers goods or services that fail to meet the specifications of the Solicitation Document;

(E) Is late;

(F) Is not in substantial compliance with the Solicitation Document; or

(G) Is not in substantial compliance with all prescribed public procurement procedures.

(c) The District shall reject an Offer upon the District's finding that the Offeror:

(A) Has not been prequalified under ORS 279B.120 and the District required mandatory prequalification;

(B) Has been Debarred or has been disqualified under PPS 46-0210(4) (Disqualification);

(C) Has not met the requirements of ORS 279A.105 (emerging small business), if required by the Solicitation Document;

(D) Has not submitted properly executed Bid or proposal security as required by the Solicitation Document;

(E) Has failed to provide the certification of non-discrimination required under ORS 279A.110(4); or

(F) Is non-Responsible. Offerors are required to demonstrate their ability to perform satisfactorily under a Contract. Before awarding a Contract, the District shall have information that indicates that the Offeror meets the applicable standards of Responsibility. To be a Responsible Offeror, the District shall determine under ORS 279B.110 that the Offeror:

(i) Has available the appropriate financial, material, equipment, facility and personnel resources, and expertise, or ability to obtain the resources and expertise, necessary to meet all contractual responsibilities;

(ii) Has completed previous contracts of a similar nature with a satisfactory record of performance. A satisfactory record of performance means that to the extent the costs associated with and time available to perform a previous contract were within the Offeror's control, the Offeror stayed within the time and budget allotted for the procurement, and otherwise performed the contract in a satisfactory manner. The District should carefully scrutinize an Offeror's record of contract performance if the Offeror is or recently has been materially deficient in contract performance. In reviewing the Offeror's performance, the District should determine whether the Offeror's deficient performance was expressly excused under the terms of the contract, or whether the Offeror took appropriate corrective action. The District may review the Offeror's performance on both private and public contracts in determining the Offeror's record of contract performance. The District shall make its basis for determining an Offeror non-Responsible under this section part of the Solicitation file as required by ORS 279B.110(2)(b).

(iii) Has a satisfactory record of integrity. An Offeror may lack integrity if the District determines the Offeror demonstrates a lack of business ethics, such as violation of state environmental laws or false certifications made to the District. The District may find an Offeror non-Responsible based on the lack of integrity of any person having influence or control over the Offeror (such as a key employee of the Offeror that has the authority to significantly influence the Offeror's performance of the Contract or a parent company, predecessor, or successor person). The standards for Debarment under ORS 279B.130 may be used to determine an Offeror's integrity. The District may find an Offeror non-responsible based on previous convictions of offenses related to obtaining or attempting to obtain a contract or subcontract, or in connection with the Offeror's performance of a contract or subcontract. The District shall make its basis for determining that an Offeror is non-Responsible under this section part of the Solicitation file as required by ORS 279B.110(2)(c);

(iv) Is legally qualified to contract with the District;

(v) Has attested in writing that the Offeror complied with the tax laws of this state and of political subdivisions of this state; and

(vi) Has supplied all necessary information in connection with the inquiry concerning Responsibility. If the Offeror fails to promptly supply information requested by the District concerning Responsibility, the District shall base the determination of responsibility on any available information, or may find the Offeror non-Responsible.

(2) Required Tax Certification. For the purposes of subparagraph (1)(c)(F)(v) of this rule:

(A) The period for which the Offeror shall attest that it complied with the applicable tax laws shall extend no fewer than six years into the past from the date of the Closing.

(B) Tax laws include, but are not limited to, ORS 305.620, ORS chapters 316, 317 and 318, any tax provisions imposed by a political subdivision that apply to the Offeror or to the performance of the Contract, and any rules and regulations that implement or enforce those tax laws.

(C) The District may exercise discretion in determining whether a particular form of attesting to compliance with the tax laws is "credible and convenient" under ORS 279B.110(2)(e), taking into consideration the circumstances in which the attestation is made and the consequences of making a false attestation. Therefore, a Contracting Agency may accept forms of attestation that range from a notarized statement to a less formal document that records the Offeror's attestation. However, State Contracting Agencies may not accept the

certificate of compliance with tax laws required by ORS 305.385 unless that certificate embraces, in addition to the tax laws described in ORS 305.380, the tax laws of political subdivisions.

(3) Form of Business Entity. For purposes of this rule, the District may investigate any Person submitting an Offer. The investigation may include that Person's officers, directors, owners, affiliates, or any other Person acquiring ownership of the Person to determine application of this rule or to apply the Debarment provisions of this rule.

PPS 47-0650 Rejection of All Offers

(1) Rejection. The District may reject all Offers when the rejection is in the best interest of the District as determined by the District. The reasons for the rejection shall be made part of the Solicitation file. The District is not liable to any bidder or Proposer for any loss or expense caused by or resulting from the cancellation or rejection of a solicitation, bid, proposal, or award. ORS 279B.100. The District shall notify all Offerors of the rejection of all Offers, along with the reasons for rejection of all Offers.

(2) Criteria. The District may reject all Offers based on the following criteria:

(a) The content of or an error in the Solicitation Document or the procurement process unnecessarily restricted competition for the Contract;

(b) The price, quality or performance presented by the Offerors are too costly or of insufficient quality to justify acceptance of any Offer;

(c) Misconduct, error, or ambiguous or misleading provisions in the Solicitation Document threaten the fairness and integrity of the competitive process;

(d) Causes other than legitimate market forces threaten the integrity of the competitive process. These causes may include, without limitation, those that tend to limit competition, such as restrictions on competition, collusion, corruption, unlawful anti-competitive conduct, and inadvertent or intentional errors in the Solicitation Document;

(e) The District cancels the procurement or solicitation in accordance with PPS 47-0660; or

(f) Any other circumstance indicating that awarding the Contract would not be in the public interest.

PPS 47-0660 Cancellation of Procurement or Solicitation

(1) Cancellation in the District Interest. The District may cancel a procurement or solicitation when the cancelation is in the best interest of the District as determined by the District. The reasons for the cancellation shall be made part of the Solicitation file. The District is not liable to any bidder or Proposer for any loss or expense caused by or resulting from the cancellation or rejection of a solicitation, bid, proposal, or award.

(2) Notice of Cancellation Before Opening. If the District cancels a procurement or solicitation prior to Opening, the District shall provide written notice of cancellation in the same manner that the District initially provided notice of the Solicitation. Such notice of cancellation shall:

(a) Identify the Solicitation Document;

(b) Briefly explain the reason for cancellation; and

(c) If appropriate, explain that an opportunity will be given to compete on any re-solicitation.

(3) Notice of Cancellation After Opening. If the District cancels a procurement or solicitation after Opening, the District shall provide written notice of cancellation to all Offerors who submitted Offers.

PPS 47-0670 Disposition of Offers if Procurement or Solicitation Canceled

(1) Prior to Opening. If the District cancels a procurement or solicitation prior to Opening, the District shall return all Offers it received to Offerors unopened, provided the Offeror submitted its Offer in a hard copy format with a clearly visible return address. If there is no return address on the envelope, the District shall open the Offer to determine the source and then return it to the Offeror. For Electronic Offers, the District shall delete the Offers from the Contracting Agency's Electronic Procurement System or information technology system.

(2) After Opening. If the District cancels a procurement or solicitation after Opening, the District:

(a) May return Proposals in accordance with ORS 279B.060(6)(c); and

(b) Shall keep bids in the Solicitation file.

(3) Rejection of All Offers. If the District rejects all Offers, the District shall keep all Proposals and Bids in the Solicitation file.

LEGAL REMEDIES

PPS 47-0700 Protests and Judicial Review of Special Procurements

(1) Purpose. An Affected Person may protest the approval of a Special procurement. Pursuant to ORS 279B.400(1), before seeking judicial review of the approval of a Special procurement, an Affected Person shall file a written protest with the Superintendent and exhaust all administrative remedies.

(2) Delivery. Notwithstanding the requirements for filing a writ of review under ORS chapter 34 pursuant to ORS 279B.400(4)(a), an Affected Person shall deliver a written protest to the District within seven (7) days after the first date of public notice of the approval of a Special procurement by the District, unless a different protest period is provided in the public notice of the approval of a Special procurement.

(3) Content of Protest. The written protest shall include:

(a) A detailed statement of the legal and factual grounds for the protest;

(b) A description of the resulting harm to the Affected Person; and

(c) The relief requested.

(4) Contract Review Board Response. The Contract Review Board shall not consider an Affected Person's protest of the approval of a Special procurement submitted after the timeline established for submitting such protest under this rule or such different time period as may be provided in the public notice of the approval of a Special procurement. The Contract Review Board shall issue a written disposition of the protest in a timely manner. If the Contract Review Board upholds the protest, in whole or in part, it may in its sole discretion implement the sustained protest in the approval of the Special procurement, or revoke the approval of the Special procurement.

(5) Judicial Review. An Affected Person may seek judicial review of the Superintendent's decision relating to a protest of the approval of a Special procurement in accordance with ORS 279B.400.

PPS 47-0710 Protests and Judicial Review of Sole-Source procurements

(1) Purpose. For sole-source procurements requiring public notice under PPS 47-0275, an Affected Person may protest the determination of the Superintendent or designee that the goods or services or class of goods or services are available from only one source. Pursuant to ORS 279B.420(3)(f), before seeking judicial review, an Affected Person shall file a written protest with the Superintendent or designee and exhaust all administrative remedies.

(2) Delivery. Unless otherwise specified in the public notice of the sole-source procurement, an Affected Person shall deliver a written protest to the Superintendent or designee within seven days after the first date

of public notice of the sole-source procurement, unless a different protest period is provided in the public notice of a sole-source procurement.

(3) Content of Protest. The written protest shall include:

(a) A detailed statement of the legal and factual grounds for the protest;

(b) A description of the resulting harm to the Affected Person; and

(c) The relief requested.

(4) Response. The Superintendent or designee shall not consider an Affected Person's sole-source procurement protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the public notice of the sole-source procurement. The Superintendent or designee shall issue a written disposition of the protest in a timely manner. If the Superintendent or designee upholds the protest, in whole or in part, the Superintendent shall not enter into a sole-source Contract.

(5) Judicial Review. Judicial review of the Superintendent's or designee's disposition of a sole-source procurement protest shall be in accordance with ORS 279B.420.

PPS 47-0720 Protests and Judicial Review of Multi-Tiered and Multistep Solicitations

(1) Purpose. An Affected Offeror may protest exclusion from the competitive Range or from subsequent tiers or steps of a solicitation in accordance with the applicable Solicitation Document. When such a protest is permitted by the Solicitation Document, then pursuant to ORS 279B.420(3)(f), before seeking judicial review, an Affected Offeror shall file a written protest with the District and exhaust all administrative remedies.

(2) Basis for Protest. An Affected Offeror may only protest its exclusion from a tier or step of competition only if the Offeror is Responsible and submitted a Responsive Offer and, but for the District's mistake in evaluating the Offerors or other Offerors' Offers, the protesting Offeror would have been eligible to participate in the next tier or step of competition. For example, the protesting Offeror shall claim it is eligible for inclusion in the competitive Range if all ineligible higher-scoring Offerors are removed from consideration, and that those ineligible Offerors are ineligible for inclusion in the competitive Range because their Proposals were not Responsive, or the District committed a substantial violation of a provision in the Solicitation Document or of an applicable procurement statute or administrative rule, and the protesting Offeror was unfairly evaluated and would have, but for such substantial violation, been included in the competitive Range.

(3) Delivery. Unless otherwise specified in the Solicitation Document, an Affected Offeror shall deliver a written protest to the District within seven (7) days after issuance of the notice of the competitive Range or notice of subsequent tiers or steps.

(4) Content of Protest. The Affected Offeror's protest shall be in writing and shall specify the grounds upon which the protest is based.

(5) District Response. The District shall not consider an Affected Offeror's multi-tiered or multistep solicitation protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the Solicitation Document. The District shall issue a written disposition of the protest in a timely manner. If the District upholds the protest, in whole or in part, the District may in its sole discretion either issue an Addendum under PPS 47-0430 reflecting its disposition or cancel the procurement or solicitation under PPS 47-0660.

(6) Judicial Review. Judicial review of the District's decision relating to a multi-tiered or multistep solicitation protest shall be in accordance with ORS 279B.420.

PPS 47-0730 Protests and Judicial Review of Solicitations

(1) Purpose. A prospective Offeror may protest the procurement process or the Solicitation Document for a Contract solicited under ORS 279B.055, 279B.060, and 279B.085 as set forth in ORS 279B.405(2). Pursuant to ORS 279B.405(3), before seeking judicial review, a prospective Offeror shall file a written protest with the District and exhaust all administrative remedies.

(2) Delivery. Unless otherwise specified in the Solicitation Document, a prospective Offeror shall deliver a written protest to the District not less than ten (10) days prior to Closing.

(3) Content of Protest. The prospective Offeror's written protest shall include:

(a) Sufficient information to identify the Solicitation that is the subject of the protest;

(b) The grounds that demonstrate how the procurement process is contrary to law or how the Solicitation Document is unnecessarily restrictive, is legally flawed, or improperly specifies a Brand Name;

(c) Evidence or supporting documentation that supports the grounds on which the protest is based; and

(d) A statement of the desired changes to the procurement process or the Solicitation Document that the prospective Offeror believes will remedy the conditions upon which the prospective Offeror based its protest.

(4) District Response. The District shall not consider a Prospective Offeror's solicitation protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the Solicitation Document. The District shall consider the protest if it is timely filed and meets the conditions set forth in section (3) of this rule. The District shall issue a written disposition of the protest no fewer than three business days before Offers are due. If the District upholds the protest, in whole or in part, the District may in its sole discretion either issue an Addendum reflecting its disposition under PPS 47-0430 or cancel the procurement or solicitation under PPS 47-0660.

(5) Extension of Closing. If the District receives a protest from a prospective Offeror in accordance with this rule, the District may extend Closing if the District determines an extension is necessary to consider and respond to the protest.

(6) Clarification. Prior to the deadline for submitting a protest, a prospective Offeror may request that the District clarify any provision of the Solicitation Document. The District's clarification to an Offeror, whether orally or in writing, does not change the Solicitation Document and is not binding on the District unless the District amends the Solicitation Document by Addendum.

(7) Judicial Review. Judicial review of the District's decision relating to a solicitation protest shall be in accordance with ORS 279B.405.

(8) F**ailure to Protest or Request a Clarification Precludes Protest of Award on Such Issue**. An Offeror cannot protest an award based on any issue that could have, but was not, raised as a Request for Clarification or Protest of solicitation pursuant to this section.

PPS 47-0740 Protests and Judicial Review of Contract Award

(1) Purpose. An Offeror may protest the award of a Contract, or the intent to award a Contract, whichever occurs first, if:

(a) The bidder or Proposer is adversely affected because the bidder or Proposer would be eligible to be awarded the Public Contract in the event that the protest were successful; and

(b) The reason for the protest is that:

(A) All lower Bids or higher ranked Proposals are non-Responsive;

(B) The District has failed to conduct the evaluation of Proposals in accordance with the criteria or processes described in the Solicitation materials;

(C) The District has abused its discretion in rejecting the protestor's bid or proposal as non-Responsive; or

(D) The District's evaluation of Bids or Proposals or the District's subsequent determination of award is otherwise in violation of these rules or the Public Contracting Code.

(2) Delivery. An Offeror shall file a written protest with the District and exhaust all administrative remedies before seeking judicial review of the District's Contract award decision. Unless otherwise specified in the Solicitation Document, an Offeror shall deliver a written protest to the District within seven (7) days after the award of a Contract, or issuance of the notice of intent to award the Contract, whichever occurs first.

(3) Content of Protest. An Offeror's written protest shall specify the grounds for the protest to be considered by the District pursuant to section (1) of this rule.

(4) District Response. The District shall not consider an Offeror's Contract award protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the Solicitation Document. The District shall issue a written disposition of the protest in a timely manner. If the District upholds the protest, in whole or in part, the District may in its sole discretion either award the Contract to the successful protestor or cancel the procurement or solicitation.

(5) Judicial Review. Judicial review of the District's decision relating to a Contract award protest shall be in accordance with ORS 279B.415.

PPS 47-0745 Protests and Judicial Review of Qualified Products List Decisions

(1) Purpose. A prospective Offeror may protest the District's decision to exclude the prospective Offeror's goods from the District's qualified products list under ORS 279B.115. A prospective Offeror shall file a written protest and exhaust all administrative remedies before seeking judicial review of the District's qualified products list decision.

(2) Delivery. Unless otherwise stated in the District's notice to prospective Offerors of the opportunity to submit goods for inclusion on the qualified products list, a prospective Offeror shall deliver a written protest to the District within seven (7) days after issuance of the District's decision to exclude the prospective Offeror's goods from the qualified products list.

(3) Content of Protest. The prospective Offeror's protest shall be in writing and shall specify the grounds upon which the protest is based.

(4) District Response. The District shall not consider a prospective Offeror's qualified products list protest submitted after the timeline established for submitting such protest under this rule, or such different time period as may be provided in the District's notice to prospective Offerors of the opportunity to submit goods for inclusion on the qualified products list. The District shall issue a written disposition of the protest in a timely manner. If the District upholds the protest, it shall include the successful protestor's goods on the qualified products list.

(5) Judicial Review. Judicial review of the District's decision relating to a qualified products list protest shall be in accordance with ORS 279B.420.

PPS 47-0750 Judicial Review of Other Violations

Any violation of ORS 279A or 279B by the District, for which no judicial remedy is otherwise provided in the Public Contracting Code, is subject to judicial review as set forth in ORS 279B.420.

PPS 47-0760 Review of Prequalification and Debarment Decisions

(1) Upon receipt of a notice from the District of a prequalification decision under ORS 279B.125 or of a decision to Debar under ORS 279B.130, a prospective bidder or Proposer that wishes to appeal the decision shall, within three days after receipt of the notice, notify the District that the prospective bidder or Proposer appeals the decision as provided in this section.

(2) Immediately upon receipt of the prospective bidder's or Proposer's notice of appeal, the District shall notify the appropriate Local Contract Review Board.

(3) Upon the receipt of notice from the District under section (2) of this rule, the Contract Review Board shall promptly notify the Person appealing and the District of the time and place of the hearing. The Contract Review Board shall conduct the hearing and decide the appeal within 30 days after receiving the notice from the District. The Contract Review Board shall set forth in writing the reasons for the hearing decision.

(4) At the hearing, the Contract Review Board shall consider de novo the notice of denial, revocation, or revision of a prequalification or the notice of Debarment, the standards of responsibility listed in ORS 279B.110(2) on which the District based the denial, revocation or revision of the prequalification or the reasons listed in ORS 279B.130(2) on which the District based the Debarment, and any evidence provided by the parties. Hearings before the Contract Review Board shall be conducted under rules of procedure adopted by the Contract Review Board.

(5) The Contract Review Board may allocate the Contract Review Board's costs for the hearing between the Person appealing and the District. The allocation shall be based on facts found by the Contract Review Board and stated in the final order that, in the Contract Review Board's opinion, warrant such allocation of costs. If the final order does not allocate the costs for the hearing, the costs shall be paid as follows:

- **(a)** If the decision to deny, revoke, or revise a prequalification of a Person as a bidder or the decision to Debar a Person is upheld, the costs shall be paid by the Person appealing the decision.
- **(b)** If the decision to deny, revoke, or revise a prequalification of a Person as a bidder or the decision to Debar a Person is reversed, the costs shall be paid by the District.

(6) Judicial review of the District's prequalification and Debarment decisions shall be as set forth in ORS 279B.425.

PPS 47-0800 Amendments to Goods or Services Contracts and Price Agreements

(1) **Generally**. The District may amend a Contract for goods or services without additional competition in any of the following circumstances:

- **(a)** The amendment is within the scope of the procurement as described in the Solicitation Documents, if any, or if no Solicitation Documents, as described in the sole source notice or the approved Special procurement, if any. An amendment is not within the scope of the procurement if the District determines that if it had described in the procurement the changes to be made by the amendment, it would likely have increased competition or affected award of the Contract.
- **(b)** These rules otherwise permit the District to award a Contract without competition for the goods or services to be procured under the amendment.
- **(c)** The amendment is necessary to comply with a change in law that affects performance of the Contract.
- **(d)** The amendment results from renegotiation of the terms and conditions, including the Contract Price, of a Contract and the amendment is Advantageous to the District, subject to all of the following conditions:
  - **(A)** The goods or services to be provided under the amended Contract are the same as the goods or services to be provided under the unamended Contract.

(B) The District determines that, with all things considered, the amended Contract is at least as favorable to the District as the unamended Contract.

(C) The amended Contract does not have a total term greater than allowed in the Solicitation Documents, if any, or if no Solicitation Documents, as described in the sole source notice or the approved Special procurement, if any, after combining the initial and extended terms. For example, a one-year Contract described as renewable each year for up to four additional years, may be renegotiated as a two to five-year Contract, but not beyond a total of five years.

(1) Small or Intermediate Contract. A Contracting Agency may amend a Contract awarded as a small or intermediate procurement pursuant to section (1) of this rule, provided that the total increase in Contract price does not exceed 125 percent of the maximum threshold for small procurements or for intermediate procurements.

(2) Price Agreements. The District may amend a Price Agreement as follows:

(a) As permitted by the Price Agreement;

(b) If the circumstances set forth in ORS 279B.140(2) exist, as follows:

(A) The District fails to receive funding or appropriations to sustain purchases at the levels contemplated at the time of contracting; or

(B) The applicable program is terminated or the law changes so that purchases under the Price Agreement are no longer authorized or appropriate for the District's use; or

(c) As permitted by applicable law.

(3) Amendments That Would Cause a Contract to Exceed the Superintendent's Authority. An amendment to a contract approved by the Superintendent that would cause the total Contract Price to exceed the Superintendent's delegated authority to approve contracts under PPS 45-0200 shall be approved by the School Board except as provided in PPS 45-0200.

~~**(4) Reporting Requirement for Amendments/Change Orders That Exceed 125 Percent of Original Contract Price**.~~

~~**(a)** A Contract Amendment or Change Order or cumulative Contract Amendments or Change Orders that increase the total Contract Price to greater than 125 percent of the original Contract Price shall be reported to the School Board, except in any of the following circumstances:~~

~~**(A)** The Original Contract Price does not exceed $500,000.~~

~~**(B)** The Superintendent determines that the Amendment, additional scope, or alternative work was contemplated in the original procurement and provided for in the original Contract, and the School Board previously approved the entire scope and/or maximum renewal terms. (Examples include a solicitation and contract that provides for renewal or extension for subsequent terms or a contract that specifically allows for alternates or additional work.)~~

~~**(b)** Contracts subject to the reporting requirement under this Rule shall be reported to the School Board a second time if subsequent Amendments or Change Orders increase the total Contract Price to greater than 150 percent of the original Contract Price.~~

~~**(c)** Contracts subject to the reporting requirement under this Rule shall be reported to the Board at the next regular business meeting of the Board following approval of the amendment or change triggering the reporting requirement. The report shall include an explanation of the basis for the amendment or change order.~~

END OF DIVISION 47

DIVISION 48

CONSULTANT SELECTION: ARCHITECTURAL, ENGINEERING, PHOTOGRAMMETRIC MAPPING, TRANSPORTATION PLANNING OR LAND SURVEYING SERVICES AND RELATED SERVICES CONTRACTS

PPS 48-0100 Application

These division 48 rules apply to the screening and selection of Architects, Engineers, Photogrammetrists, Transportation Planners, Land Surveyors, and providers of Related services under Contracts, and set forth the following procedures:

(1) Procedures through which the District selects Consultants to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, Land Surveying services, or Related services; and

(2) Two-tiered procedures for selection of Photogrammetrists, Transportation Planners, Land Surveyors, and providers of Related services for certain public improvements owned and maintained by the District.

PPS 48-0110 Definitions

In addition to the definitions set forth in PPS 46-0110, the following definitions apply to these division 48 rules:

(1) "Architect" is defined in ORS 279C.100 and means a Person who is registered and holds a valid certificate in the practice of architecture in the State of Oregon, as provided under ORS 671.010 through 671.220, and includes, without limitation, the terms "Architect," "licensed Architect," and "registered Architect."

(2) "Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services" is defined in ORS 279C.100 and means professional services that are required to be performed by an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor.

(3) "Consultant" means an Architect, Engineer, Photogrammetrist, Transportation Planner, Land Surveyor, or provider of Related services. A Consultant includes a business entity that employs Architects, Engineers, Photogrammetrists, Transportation Planners, Land Surveyors, or providers of Related services, or any combination of the foregoing. Provided, however, when the District is entering into a direct Contract under PPS 48-0200(1)(c) or (d), the "Consultant" shall be an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor, as required by ORS 279C.115(1).

(4) "Engineer" means an individual who is registered and holds a valid certificate in the practice of land engineering in the State of Oregon, as provided under ORS 672.002 to 672.325, and includes all terms listed in ORS 672.002(2).

(5) "Estimated Fee" means The District's reasonably projected fee to be paid for a Consultant's services under the anticipated Contract, excluding all anticipated reimbursable or other non-professional fee expenses. The Estimated Fee is used solely to determine the applicable Contract solicitation method and is distinct from the total amount payable under the Contract.

(6) "Land Surveyor" means a Person who is registered and holds a valid certificate in the practice of land surveying in the State of Oregon, as provided under ORS 672.002 to 672.325, and includes all terms listed in ORS 672.002(5).

(7) "Photogrammetric Mapping" means an evaluating and measuring of land that is limited to the determination of the topography, area, contours, and location of planimetric features, by using photogrammetric methods or similar remote sensing technology, including but not limited to using existing ground control points incidental to the photogrammetric or remote sensing mapping process.

(8) "Photogrammetrist" means an individual who is registered and holds a valid certificate to practice photogrammetric mapping in the State of Oregon, as provided under ORS 672.002 to 672.325, and includes all terms listed in ORS 672.002(5).

(9) "Price Agreement" for purposes of this division 48 is limited to mean an agreement related to the procurement of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, under agreed-upon terms and conditions, including, but not limited to terms and conditions of later work orders or task orders for project-specific services, and which may include Consultant compensation information, with:

(a) No guarantee of a minimum or maximum purchase; or

(b) An initial work order, task order, or minimum purchase, combined with a continuing Consultant obligation to provide Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services in which the District does not guarantee a minimum or maximum additional purchase.

(10) "Project" means all components of the District's planned undertaking that gives rise to the need for a Consultant's Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, under a Contract.

(11) "Related Services" means Personal services, other than Architectural, Engineering, Photogrammetric Mapping, Transportation Planning, or Land Surveying services that are related to planning, designing, engineering, or overseeing public improvement projects or components of public improvement projects, including but not limited to landscape architectural services, facilities planning services, energy planning services, space planning services, hazardous substances or hazardous waste or toxic substances testing services, cost-estimating services, appraising services, material testing services, mechanical system balancing services, commissioning services, project management services, construction management services, and owner's representation services, or land-use planning services.

(12) "Transportation Planning Services" means Transportation Planning services for projects that require compliance with the National Environmental Policy Act, 42 U.S.C. 4321 et seq. Transportation Planning services include only project-specific transportation planning involved in the preparation of categorical exclusions, environmental assessments, environmental impact statements, and other documents required for compliance with the National Environmental Policy Act, 42 USC 4321 et. seq. Transportation Planning services do not include transportation planning for corridor plans, transportation system plans, interchange area management plans, refinement plans, and other transportation plans not directly associated with an individual project that will require compliance with the National Environmental Policy Act, 42 USC 4321 et. seq. Transportation Planning services also do not include transportation planning for projects not subject to the National Environmental Policy Act, 42 USC 4321 et. seq.

PPS 48-0120 List of Interested Consultants; Performance Record

(1) Consultants who are engaged in the lawful practice of their profession and who are interested in providing Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services may annually submit a statement describing their qualifications and related performance information to the District's office addresses. The District shall use this information to create a list of prospective Consultants and shall update this list at least once every two years.

(2) The District may compile and maintain a record of each Consultant's performance under Contracts with the particular Contracting Agency, including information obtained from Consultants during an exit interview. Upon request and in accordance with the Oregon Public Records Law (ORS 192.311 through 192.478), the District may make available copies of the records.

PPS 48-0130 Applicable Selection Procedures; Pricing Information; Disclosure of Proposals; Conflicts of Interest

(1) Selection of Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors. When selecting the most qualified Consultant to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, the District shall follow the applicable selection procedure under either PPS 48-0200 (Direct Appointment Procedure), PPS 48-0210 (Informal Selection Procedure), or PPS 488-0220 (Formal Selection Procedure). The District may solicit or use pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates and overhead, in any of the District's selection procedures to select Consultants to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, pursuant to the requirements of ORS 279C.110(5)

(2) Selection of Consultants to Perform Related Services. The District shall select a Consultant to perform Related services using one of the following selection procedures:

(a) When selecting a Consultant on the basis of qualifications alone, the District shall follow the applicable selection procedure under either PPS 48-0200 (Direct Appointment Procedure), PPS 48-0210 (Informal Selection Procedure), or PPS 48-0220 (Formal Selection Procedure);

(b) When selecting a Consultant on the basis of price competition alone, the District shall follow the applicable provisions under PPS 48-0200 (Direct Appointment Procedure), the applicable provisions of PPS 48-0210 (Informal Selection Procedure) pertaining to obtaining and evaluating price proposals and other pricing information, or the applicable provisions of PPS 48-0220 (Formal Selection Procedure) pertaining to obtaining and evaluating price Proposals and other pricing information; and

(c) When selecting a Consultant on the basis of price and qualifications, the District shall follow the applicable provisions under PPS 48-0200 (Direct Appointment Procedure), the applicable provisions of PPS 48-0210 (Informal Selection Procedure) pertaining to obtaining and evaluating price and qualifications Proposals, or the applicable provisions of PPS 48-0220 (Formal Selection Procedure) pertaining to obtaining and evaluating price and qualifications proposals. For selections under the informal selection procedure of PPS 48-0210, the District may use abbreviated requests for proposals that nevertheless meet the requirements of PPS 48-0210, when the District determines, in its sole discretion, that the characteristics of the project and the Related services required by the District would be adequately addressed by a more abbreviated Request for proposal document generally comparable to the intermediate procurement procedures and related documentation under ORS 279B.070 and PPS 47-0270. The District may request and consider a Proposer's pricing policies and pricing Proposals or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead, submitted with a proposal.

Sections (1) and (2) Do Not Apply to Price Agreements. The District is not required to follow the procedures in section (1) or section (2) of this rule when the District has established Price Agreements pursuant to PPS 48-0270 with more than one Consultant and is selecting a single Consultant to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under an individual work order or task order. Provided, however, the criteria and procedures the District uses to select a single Consultant, when the District has established Price Agreements with more than one Consultant, shall meet the requirements of OAR PPS 48-0270 (Price Agreements).

(1) Electronic Selection. The District may use electronic methods to screen and select a Consultant in accordance with the procedures described in sections (1) and (2) of this rule. If The District uses electronic methods to screen and select a Consultant, the District shall first promulgate rules for conducting the screening and selection procedure by electronic means, substantially in conformance with PPS 47-0330 (Electronic procurement).

(2) Contracts for "Mixed" Services. For purposes of these division 48 rules, a "mixed" Contract is one requiring the Consultant to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, and also provide Related services, other services or other related goods under the Contract. The District's classification of a procurement that will involve a "mixed" Contract will be determined by the predominant purpose of the Contract. The District shall determine the predominant purpose of the Contract by determining which of the services involves the majority of the total Estimated Fee to be paid under the Contract. If the majority of the total Estimated Fee to be paid under the Contract is for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, the District shall comply with the requirements of section (1) of this rule. If the majority of the total Estimated Fee to be paid under the Contract is for Related services, the District shall comply with the requirements of section (2) of this rule. If the majority of the total Estimated Fee to be paid under the Contract is for some other services or goods under the Public Contracting Code, the District shall comply with the applicable provisions of PPS divisions 46, 47 and 49 of these rules that match the predominant purpose of the Contract.

(3) Compliance With Board Policy. In applying these rules, the District shall support Board Policies relating to District Contracts.

(4) Disclosure Requirements for Proposals Under Division 48. The following provisions apply to proposals received by the District for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services:

(a) "Competitive Proposals" Means all Proposals Solicited under Division 48. The term "competitive proposal" includes Proposals under PPS 48-0200 (Direct Appointment Procedure), PPS 48-0210 (Informal Selection Procedure), PPS 48-0220 (Formal Selection Procedure) or PPS 48-0130(2)(c) (Selection Based on Price and Qualifications), and any proposals submitted in response to a selection process for a work order or task order under PPS 48-0270 (Price Agreements) or PPS 48-0280 (FSCP).

(b) Direct Appointments. For purposes of Proposals received by the District under PPS 48-0200 (Direct Appointment Procedure), a formal notice of intent to award is not required. As a result, while the District may make Proposals under PPS 48-0200 (Direct Appointment Procedure) open for public inspection following the District's decision to begin Contract negotiations with the selected Consultant, Proposals are not required to be open for public inspection until after the District has executed a Contract with the selected Consultant.

(c) Closely Competitive Proposals. In the limited circumstances permitted by ORS 279C.110, 279C.115, and 279C.120, here the District is conducting discussions or negotiations with Proposers who submit Proposals that the District has determined to be closely competitive or to have a reasonable chance of being selected for award, the District may open Proposals so as to avoid disclosure of proposal contents to competing Proposers, consistent with the requirements of ORS 279C.107. Otherwise, the District may open Proposals in such a way as to avoid disclosure of the contents until after the District executes a Contract with the selected Consultant. If the District determines that it is in the best interest of the District to do so, the District may make Proposals available for public inspection following the District's issuance of a notice of intent to award a Contract to a Consultant; and

(d) ORS 297C.107 Requirements. Disclosure of Proposals and proposal information is otherwise governed by ORS 279C.107 as follows:

(A) The District may open Proposals so as to avoid disclosing contents to competing Proposers during, where applicable, the process of negotiation.

(B) The District need not open Proposals for public inspection until after the District executes a Contract.

(C) Regardless of when Proposals are opened for public inspection, the District shall withhold from disclosure trade secrets as defined in ORS 192.501, and information submitted to the District in confidence as described in ORS 192.502.

(D) Opening a proposal at a public meeting of the Board or other body subject to the Public Meetings Law does not make the contents of the proposal subject to disclosure regardless of whether an executive session has been called.

(E) If a request for Proposals is cancelled after Proposals are received, the District shall, subject to ORS 192.501 and 192.502, return a proposal and all copies of the proposal to the Proposer. The District shall keep a list of returned Proposals in the Solicitation file.

(5) Independent and Objective Oversight Required. Pursuant to ORS 279C.307(1), when procuring Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Contract subject to PPS divisions 48 or 49 ("ORS 279C.307 Services"), the District may not:

(a) Procure the Personal services identified in ORS 279C.307 from a Contractor or Consultant or an affiliate of a Contractor or Consultant who is a party to the Public Contract that is subject to administration, management, monitoring, inspection, evaluation, or oversight by means of the Personal services; or

(b) Procure the Personal services identified in ORS 279C.307 through the Public Contract that is subject to administration, management, monitoring, inspection, evaluation, or oversight by means of Personal services.

(6) Application of Section 8. The requirements of ORS 279C.307(1) and section 8 of this rule apply in the following circumstances, except as provided in section (9) and (10) of this rule:

(a) The District requires the procurement of Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Public Contract or performance under a Public Contract that is subject to ORS chapter 279C. A Public Contract that is "subject to ORS chapter 279C" includes a Public Contract for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, a Public Contract for Related services, or a Public Contract for construction services under ORS chapter 279C.

(b) The procurement of Personal services subject to the restrictions of ORS 279C.307 include, but are not limited to, the following:

(A) Procurements for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services that involve overseeing or monitoring the performance of a construction Contractor under a Public Contract for construction services subject to ORS chapter 279C;

(B) Procurements for commissioning services, which involve monitoring, inspecting, evaluating or otherwise overseeing the performance of a Contractor providing Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or the performance of a construction Contractor under a Public Contract for construction services subject to ORS chapter 279C;

(C) Procurements for project management services, which involve administration, management, monitoring, inspecting, evaluating compliance with, or otherwise overseeing the performance of a Contractor providing Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, construction services subject to ORS chapter 279C, commissioning services, or other Related services for a project;

(D) Procurements for special inspections and testing services, which involve inspecting, testing, or otherwise overseeing the performance of a construction Contractor under a Public Contract for construction services subject to ORS chapter 279C; and

(E) Procurements for other Related services or Personal services, which involve administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing the Public Contracts described in section (10)(a) of this rule.

(7) Design-Build and CM/GC Contract Solicitations. The requirements of ORS 279C.307 do not apply in the following circumstances, except as further specified below:

(a) To the District's procurement of both design services and construction services through a single "Design-Build" procurement, as that term is defined in PPS 49-0610. Such a Design-Build procurement includes a procurement under an Energy Savings Performance Contract, as defined in ORS 279A.010. Provided, however, the restrictions of ORS 279C.307 do apply to the District's procurement of Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Design-Build Contract or performance under such a Contract resulting from a Design-Build procurement; and

(b) To the District's procurement of both pre-construction services and construction services through a single procurement of Construction Manager/General Contractor services, as that term is defined in ORS 279C.332(3). Provided, however, the restrictions of ORS 279C.307 do apply to the District's procurement of Personal services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with, or otherwise overseeing a Construction Manager/General Contractor services Contract or performance under such a Contract resulting from a procurement of Construction Manager/General Contractor services.

(8) Application for Exception. As permitted by ORS 279C.307(3), the District may apply for an exception to the requirements of ORS 279C.307(1) in the situation when the District anticipates that it must procure Personal Services for the purpose of administering, managing, monitoring, inspecting, evaluating compliance with or otherwise overseeing a Public Contract or performance under a Public Contract that is subject to ORS chapter 279C, and the District desires to accept a Bid or other Proposal from a Contractor or Consultant that would otherwise be prohibited from bidding or proposing to provide the required Personal Services. In order for the District to obtain such an exception to the requirements of ORS 279C.307(1), the District must apply for and obtain an approved exception from the Appropriate Authority for the District before awarding a contract to the Contractor or Consultant under a Procurement for the required Personal Services, or before entering into an amendment of an existing Public Contract with the Contractor or Consultant to obtain the Personal Services.

(a) Application Requirements. The District's application to the Appropriate Authority for an exception under ORS 279C.307(3) must include the following Findings and Justifications:

(A) The District requires Personal Services described in ORS 279C.307(1);

(B) Accepting a Bid or from a Contractor or Consultant that would be subject to the prohibition described in ORS 279C.307(1) is in the best interest of the District;

(C) Approving the is unlikely to encourage favoritism in awarding Public Contracts or to substantially diminish competition for Public Contracts; and

(D) Approving the exception:

(i) Is reasonably expected to result in substantial cost savings to the District or the public; or

(ii) Otherwise will substantially promote the public interest in a manner that could not be practicably realized by complying with the prohibition described in ORS 279C.307(1).

(b) Consultation with Legal Counsel. The District shall consult with the District's legal counsel during the exception process provided for in ORS 279C.307(3) as follows:

(A) During the process of preparing an application for the exception to ensure compliance with the requirements of ORS 279C.307 and with the other applicable provisions of ORS chapter 279C;

(B) Pursuant to the requirements of an ORS 279C.307(3) exception approved by the District's Appropriate Authority; and

(C) The District's consultation with its legal counsel should include discussion and evaluation of mitigation measures that the District can include in the Procurement and in any resulting Public Contract for the Personal Services, in order to reduce any competitive advantage that the Contractor or Consultant may have or may be perceived to have, and to increase the objectivity and independence of the Contractor or Consultant during its performance of the Personal Services.

(c) Definitions. The following definitions apply to section (11) of this rule:

(i) "Appropriate Authority" means the District's local contract review board; and

(ii) "Findings and Justifications" means the determinations, findings and justifications for a conclusion that the District, in seeking an exception from the objectivity and independence requirements of ORS 279C.307(1), reaches based on the considerations set forth in ORS 279C.307(3)(d) and based on sufficient supporting facts.

SELECTION PROCEDURES

PPS 48-0200 Direct Appointment Procedure

(1) The District may enter into a Contract directly with a Consultant without following the selection procedures set forth elsewhere in these rules if:

(a) Emergency. The District finds that an Emergency exists; or

(b) Small Estimated Fee. The Estimated Fee to be paid under the Contract does not exceed $100,000; or

(c) FSCP. The Consultant is a member of an FSCP that has been established for the class of work for which a Contract is required; or

(d) Continuation of Project with an Intermediate Estimated Fee. Where a District project is being continued, as more particularly described below, and where the Estimated Fee will not exceed $250,000, the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be performed under the following requirements:

(A) The services consist of or are related to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that have been substantially described, planned, or otherwise previously studied in an earlier Contract with the same Consultant and are rendered for the same project as the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services rendered under the earlier Contract;

(B) The Estimated Fee to be made under the Contract does not exceed $250,000; and

(C) The District used either the formal selection procedure under PPS 48-0220 (Formal Selection Procedure) or the formal selection procedure applicable to selection of the Consultant at the time of original selection to select the Consultant for the earlier Contract; or

(e) Continuation of Project With an Extensive Estimated Fee. When a District project is being continued, as more particularly described below, and where the Estimated Fee is expected to exceed $250,000, the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be performed under the Contract shall meet the following requirements:

(A) The services consist of or are related to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that have been substantially described, planned, or otherwise previously studied under an earlier Contract with the same Consultant and are rendered for the same project as the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services rendered under the earlier Contract;

(B) The District used either the formal selection procedure under PPS 48-0220 (Formal Selection Procedure) or the formal selection procedure applicable to selection of the Consultant at the time of original selection to select the Consultant for the earlier Contract; and

(C) The District makes written findings that entering into a Contract with the Consultant, whether in the form of an amendment to an existing Contract or a separate Contract for the additional scope of services, will:

(iii) Promote efficient use of public funds and resources and result in substantial cost savings to the District; and

(iv) Protect the integrity of the Public Contracting process and the competitive nature of the procurement by not encouraging favoritism or substantially diminishing competition in the award of the Contract; or

(f) The Contract Review Board Grants Approval for a Direct Appointment or Alternative Procurement Process.

(A) The Superintendent may seek approval from the Local Contract Review Board for direct appointment or an alternative procurement process for Consultant services.

(B) The Superintendent shall submit a written request to the Board demonstrating that:

(i) Approval by the Board is unlikely to encourage favoritism in the award of public contracts or substantially diminish competition for public contracts; and

(ii) Is reasonably expected to result in substantial cost savings to the District or to the public; or

(iii) Otherwise substantially promotes the public interest in a manner that could not practicably be realized by complying with the selection procedures otherwise required by these rules.

(2) The District may select a Consultant for a Contract under this rule from the following sources:

(a) District's list of Consultants that is created under PPS 48-0120 (List of Interested Consultants; Performance Record);

(b) Another Contracting Agency's list of Consultants that the Contracting Agency has created under PPS 48-0120 0120 (List of Interested Consultants; Performance Record), with written consent of that Contracting Agency; or

(c) All Consultants offering the required Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that the District reasonably can identify under the circumstances.

(3) The District shall direct negotiations with a Consultant selected under this rule toward discussing, refining, and finalizing the following:

(a) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant

(b) The Consultant's performance obligations and performance schedule;

(c) Payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services; and

(d) Any other provisions that the District believes to be in the District's best interest to negotiate.

PPS 48-0210 Informal Selection Procedure

(1) The District may use the informal selection procedure described in this rule to obtain a Contract if the Estimated Fee is expected not to exceed $250,000.

(2) When using the informal selection procedure on the basis of qualifications alone or, for Related services, on the basis of price and qualifications, the District shall:

(a) Create a request for Proposals ("RFP") that includes at a minimum the following:

(A) A description of the project for which a Consultant's Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services are needed and a description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that will be required under the resulting Contract;

(B) The anticipated Contract performance schedule;

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including construction services;

(D) The date and time Proposals are due and other directions for submitting Proposals;

(E) Criteria upon which the most qualified Consultant will be selected. Selection criteria may include, but are not limited to, the following:

(i) The amount and type of resources and number of experienced staff the Consultant has committed to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP within the applicable time limits, including the current and projected workloads of such staff and the proportion of time such staff would have available for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services;

(ii) Proposed management techniques for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(iii) A Consultant's capability, experience and past performance history and record in providing similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, including but not limited to quality of work, ability to meet schedules, cost control methods and Contract administration practices;

(iv) A Consultant's approach to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP and design philosophy, if applicable;

(v) A Consultant's geographic proximity to and familiarity with the physical location of the project;

(vi) Volume of work, if any, previously awarded to a Consultant, with the objective of effecting equitable distribution of Contracts among qualified Consultants, provided such distribution does not violate the principle of selecting the most qualified Consultant for the type of professional services required;

(vii) A Consultant's ownership status and employment practices regarding women, minorities and emerging small businesses or historically underutilized businesses;

(viii) Whether the Consultant owes a liquidated and delinquent debt to the State of Oregon; and

(ix) If the District is selecting a Consultant to provide Related service, pricing policies and pricing proposals or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates and overhead.

(F) A Statement that Proposers responding to the RFP do so solely at their expense, and District is not responsible for any Proposer expenses associated with the RFP;

(G) A statement directing Proposers to the protest procedures set forth in these division 48 rules; and

(H) A sample form of the Contract.

(b) Provide an RFP to a minimum of five (5) prospective Consultants. If fewer than five (5) prospective Consultants are available, Contracting Agencies shall provide the RFP to all available prospective Consultants and shall maintain a written record of the Contracting Agencies' efforts to locate available prospective Consultants for the RFP. Contracting Agencies shall draw prospective Consultants from:

(A) The District's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record);

(B) Another Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record); or

(C) All Consultants that the District reasonably can locate that offer the desired Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, or any combination of the foregoing.

(c) Review and rank all Proposals received according to the criteria set forth in the RFP, and select the three highest ranked Proposers.

(3) Contracting Agencies using the informal selection procedure for Related services on the basis of price Proposals and other pricing information alone shall:

(a) Create an RFP that includes at a minimum the following:

(A) A description of the project for which a Consultant's Related services are needed and a description of the Related services that will be required under the resulting Contract;

(B) The anticipated Contract performance schedule;

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including construction services;

(D) The date and time Proposals are due and other directions for submitting Proposals;

(E) Any minimum or pass-fail qualifications that the Proposers shall meet, including but not limited to any such qualifications in the subject matter areas described in section (2)(a)(E)(i) through section (2)(a)(E)(viii) of this rule that are related to the Related services described in the RFP;

(F) Pricing criteria upon which the highest ranked Consultant will be selected. Pricing criteria may include, but are not limited to, the total price for the Related services described in the RFP, Consultant pricing policies and other pricing information such as the Consultant's estimated number of staff hours needed to perform the Related services described in the RFP, expenses, hourly rates and overhead;

(G) A statement directing Proposers to the protest procedures set forth in these division 48 rules; and

(H) A sample form of the Contract.

(b) Provide the RFP to a minimum of five (5) prospective Consultants. If fewer than five (5) prospective Consultants are available, Contracting Agencies shall provide the RFP to all available prospective Consultants and shall maintain a written record of the Contracting Agencies' efforts to locate available prospective Consultants for the RFP. Contracting Agencies shall draw prospective Consultants from:

(A) The District's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record);

(B) Another Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record); or

(C) All Consultants that the District reasonably can locate that offer the desired Related services; and.

(c) Review and rank all responsive Proposals received, according to the total price for the Related services described in the RFP, Consultant pricing policies and other pricing information requested in the RFP, including but not limited to the number of hours proposed for the Related services required, expenses, hourly rates and overhead, and select the three highest ranked Proposers.

(4) If the District does not cancel the RFP after it reviews the Proposals and ranks each Proposer, the District will begin negotiating a Contract with the highest ranked Proposer. The District shall direct Contract negotiations toward discussing, refining and finalizing the following:

(a) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(b) The Consultant's performance obligations and performance schedule;

(c) Payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services; and

(d) Any other conditions or provisions that the District believes to be in the District's best interest to negotiate.

(5) The District shall, either orally or in writing, formally terminate negotiations with the highest ranked Proposer, if the District and the Proposer are unable for any reason to reach agreement on a Contract within a reasonable amount of time. The District may thereafter negotiate with the second ranked Proposer, and if necessary, with the third ranked Proposer, in accordance with section (4) of this rule, until negotiations result in a Contract. If negotiations with any of the top three Proposers do not result in a Contract within a reasonable amount of time, the District may end the particular informal solicitation and thereafter may proceed with a new informal solicitation under this rule or proceed with a formal solicitation under OAR 137-048-0220 (Formal Selection Procedure).

(6) If the District uses the informal selection procedure for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, when the District will be using pricing policies, proposals or other pricing information as part of the District' screening and selection of prospective Consultants, pursuant to ORS 279C.110(5) [HB 2769 (Oregon Laws 2019, Chapter 55)], shall:

(a) Create an RFP that meets the requirements of ORS 279C.110(5)(a) In providing an estimate of the cost of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, the District may provide a specific estimate of that cost, or a range of estimated costs;

(b) Provide the RFP to a minimum of five (5) prospective Consultants. If fewer than five (5) prospective Consultants are available, the District shall provide the RFP to all available prospective Consultants and shall maintain a written record of the District's efforts to locate available prospective Consultants for the RFP. The District shall draw prospective Consultants from:

(A) The District's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record);

(B) Another Contracting Agency's list of Consultants that is created and maintained under OAR 137-048-0120 (List of Interested Consultants; Performance Record); or

(C) All Consultants that the District reasonably can locate that offer the desired Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, or any combination of the foregoing.

(c) In the initial phase of the RFP, evaluate each prospective Consultant on the basis of each Consultant's qualifications to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, with those qualifications including the criteria set forth in subsections (2)(a)(E)(i) through (2)(a)(E)(viii) of this rule;

(d) At the end of the initial phase of the RFP, announce the evaluation scores of each Consultant and rank each Consultant according to the evaluation scores. The District shall identify up to three (3) of the highest ranked prospective Consultants as being qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, and as being eligible to participate in the second phase of the RFP process;

(e) In the second phase of the RFP, request a pricing proposal from the highest ranked prospective Consultants identified in the initial phase of the RFP, with that pricing proposal to meet the requirements of ORS 279C.110(5)(c)(A) and (B);

(f) Complete the evaluation of the highest ranked prospective Consultants that have decided to provide price proposals. In the District's final evaluation of the prospective Consultants who have provided price proposals, the District cannot assign more than fifteen (15) percent of the overall weight of the evaluation criteria in the second phase of the RFP to each Consultant's price proposal;

(g) If the District does not cancel the RFP after it reviews the qualifications of all prospective Consultants and the price proposals received from the highest ranked Consultants and ranks the highest ranked Consultants from the second phase of the RFP, begin negotiating a Contract with the highest ranked prospective Consultant. The District shall direct Contract negotiations toward discussing, refining and finalizing the following:

(A) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(B) The Consultant's performance obligations and performance schedule;

(C) The Consultant's payment methodology, rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services; and

(D) Any other conditions or provisions the District believes to be in the District's best interest to negotiate; and

(h) The District shall, either orally or in writing, formally terminate negotiations with the highest ranked Consultant, if the District and the Consultant are unable for any reason to reach agreement on a Contract within a reasonable amount of time. The District may thereafter negotiate with the second ranked Consultant, and if necessary, with the third ranked Consultant, in accordance with section (6)(g) of this rule, until negotiations result in a Contract. If negotiations with any of the top three prospective Consultants do not result in a Contract within a reasonable amount of time, the District may end the particular informal solicitation and thereafter may proceed with a new informal solicitation under this rule or proceed with a formal solicitation under OAR 137-048-0220 (Formal Selection Procedure).

(7) When the Estimated Fee in an informal selection procedure under this rule is expected not to exceed $150,000, the Contracting Agency is only required to provide the RFP under sections (2), (3) and (6) of this rule to three (3) prospective Consultants. If fewer than three (3) prospective Consultants are available, the Contracting Agency shall provide the RFP to all available prospective Consultants and shall maintain a written record of the Contracting Agency's efforts to locate available prospective Consultants for the RFP.

(8) The Contracting Agency shall terminate the informal selection procedure and proceed with the formal selection procedure under PPS 48-0220 if the scope of the anticipated Contract is revised during negotiations so that the Estimated Fee will exceed $250,000.

PPS 48-0220 Formal Selection Procedure

(1) Subject to OAR PPS 48-0130 (Applicable Selection Procedures; Pricing Information; Disclosure of Proposals), the District shall use the formal selection procedure described in this rule to select a Consultant if the Consultant cannot be selected under either PPS 48-0200 (Direct Appointment Procedure) or under PPS

48-0210 (Informal Selection Procedure). The formal selection procedure described in this rule may otherwise be used at the District's discretion.

(2) When using the formal selection procedure, the District shall obtain Contracts through public advertisement of RFPs, or Requests for Qualifications followed by RFPs.

(a) Except as provided in subsection (2)(b) of this section, the District shall advertise each RFP and RFQ at least once in at least one newspaper of general circulation in the area where the project is located, and in as many other issues and publications as may be necessary or desirable to achieve adequate competition. Other issues and publications may include, but are not limited to, local newspapers, trade journals, and publications targeted to reach disadvantaged business enterprise (DBE), veteran-owned business (VB), minority business enterprise (MBE), women business enterprise (WBE), and emerging small business enterprise (ESB) audiences.

(A) The District shall publish the advertisement within a reasonable time before the deadline for the proposal submission or response to the RFQ or RFP, but in any event no fewer than fourteen (14) calendar days before the closing date set forth in the RFQ or RFP.

(B) The District shall include a brief description of the following items in the advertisement:

(i) The project;

(ii) A description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services the District seeks;

(iii) How and where Consultants may obtain a copy of the RFQ or RFP; and

(iv) The deadline for submitting a proposal or response to the RFQ or RFP.

(b) In the alternative to advertising in a newspaper as described in subsection (2)(a) of this rule, the District shall publish each RFP and RFQ by one or more of the electronic methods identified in PPS 46-0110(14). The District shall comply with Sections (2)(a)(A) and (2)(a)(B) of this rule when publishing advertisements by electronic methods.

(c) The District may send notice of the RFP or RFQ directly to all Consultants on the District's list of Consultants that is created and maintained under PPS 48-0120 (List of Interested Consultants; Performance Record).

(3) Request for Qualifications Procedure. The District may use the RFQ procedure to evaluate potential Consultants and establish a short list of qualified Consultants to whom the District may issue an RFP for some or all of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ.

(a) Mandatory RFQ Requirements. The District shall include the following, at a minimum, in each RFQ:

(A) A brief description of the project for which the District is seeking a Consultant;

(B) A description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services the District seeks for the project;

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including, but not limited to, construction services;

(D) The deadline for submitting a response to the RFQ;

(E) A description of required Consultant qualifications for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services that the District seeks;

(F) The RFQ evaluation criteria, including weights, points, or other classifications applicable to each criterion;

(G) A statement whether or not the District shall hold a pre-qualification meeting for all interested Consultants to discuss the project and the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ, and if a pre-qualification meeting will be held, the location of the meeting and whether or not attendance is mandatory; and

(H) A Statement that Consultants responding to the RFQ do so solely at their expense, and that the District is not responsible for any Consultant expenses associated with the RFQ.

(b) Optional RFQ Requirements. The District may include a request for any or all of the following in each RFQ:

(A) A statement describing Consultants' general qualifications and related performance information;

(B) A description of Consultants' specific qualifications to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ, including Consultants committed resources and recent, current, and projected workloads;

(C) A list of similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services and references concerning past performance, including but not limited to price and cost data from previous projects, quality of work, ability to meet schedules, cost control, and contract administration;

(D) A copy of all records, if any, of Consultants' performance under Contracts with any other Contracting Agency;

(E) The number of Consultants' experienced staff committed to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ, including such personnel's specific qualifications and experience and an estimate of the proportion of time that such personnel would spend on those services;

(F) Consultants' approaches to Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFQ and design philosophy, if applicable;

(G) Consultants' geographic proximity to and familiarity with the physical location of the project;

(H) Consultants' Ownership status and employment practices regarding women, minorities and emerging small businesses or historically underutilized businesses;

(I) If the District is selecting a Consultant to provide Related services, Consultants' pricing policies and pricing Proposals, or other pricing information, including the number of hours estimated for the services required, expenses, hourly rates, and overhead;

(J) Consultants' ability to assist the District in complying with any art acquisition requirements imposed by the District;

(K) Consultants' ability to assist the District in complying with State of Oregon energy efficient design requirements established by the District;

(L) Consultants' ability to assist the District in complying with the solar energy technology requirements pursuant to ORS 276.900 through 279.915; and

(M) Any other information the District deems reasonably necessary to evaluate Consultants' qualifications.

(a) Pricing Proposal Requests Not Allowed During the RFQ Process When RFQ Is Followed by RFP. If the District will use a Request for Qualifications followed by an RFP to procure Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services under this rule and District intends to use pricing policies, proposals or other pricing information as part of the District's screening and selection of prospective Consultants, pursuant to ORS 279C.110(5), the District cannot request cost proposals or otherwise use pricing policies, proposals or other pricing information as part of the Request for Qualifications. The District may only request cost proposals or otherwise use pricing policies, proposals or other pricing information during the RFP process, following the establishment of a short list of qualified Consultants through the Request for Qualifications process.

(b) RFQ Evaluation Committee. The District shall establish an RFQ evaluation committee of at least two individuals to review, score, and rank the responding Consultants according to the evaluation criteria. The District may appoint to the evaluation committee District employees or employees of other public agencies with experience in Architecture, Engineering, or Land Surveying services, Related services, construction services, or Public Contracting. If the District procedure permits, the District may include on the evaluation committee private practitioners of architecture, engineering, photogrammetry, transportation planning, land surveying, or related professions. The District shall designate one member of the evaluation committee as the evaluation committee chairperson.

(c) The District may use any reasonable screening or evaluation method to establish a short list of qualified Consultants, including, but not limited to, the following:

(A) Requiring Consultants responding to an RFQ to achieve a threshold score before qualifying for placement on the short list;

(B) Placing a pre-determined number of the highest scoring Consultants on a short list;

(C) Placing on a short list only those Consultants with certain essential qualifications or experience, whose practice is limited to a particular subject area, or who practice in a particular geographic locale or region, provided that such factors are material, would not unduly restrict competition, and were announced as dispositive in the RFQ.

(d) After the evaluation committee reviews, scores, and ranks the responding Consultants, the District shall establish a short list of at least three qualified Consultants, if feasible, provided however, if four or fewer Consultants responded to the RFQ or if fewer than three Consultants fail to meet the District's minimum requirements, then:

(A) The District may establish a short list of fewer than three qualified Consultants; or

(B) The District may cancel the RFQ and issue an RFP.

(e) No Consultant will be eligible for placement on the District's short list established under subsection (3)(d) of this rule if the Consultant or any of Consultant's principals, partners, or associates are members of the District's RFQ evaluation committee.

(f) Except when the RFQ is cancelled, the District shall provide a copy of the subsequent RFP to each Consultant on the short list.

(4) Formal Selection of Consultants Through Request for Proposal. The District shall use the procedure described in section (4) of this rule when issuing an RFP for a Contract described in section (1) of this rule.

(a) Required Contents. Except as otherwise provided in Sections (4)(b) and (4)(c) of this rule, when the District uses the formal selection procedure, the District shall include at least the following in each RFP, whether or not the RFP is preceded by an RFQ:

(A) General background information, including a description of the project and the specific Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services sought for the project, the estimated project cost, the estimated time period during which the project is to be completed, and the estimated time period in which the specific Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services sought will be performed.

(B) The RFP evaluation process and the criteria which will be used to select the most qualified Proposer, including the weights, points, or other classifications applicable to each criterion. If the District does not indicate the applicable number of points, weights, or other classifications, then each criterion is of equal value. Evaluation criteria may include, but are not limited to, the following:

(i) Proposers' availability and capability to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(ii) Experience of Proposers' key staff persons in providing similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services on comparable projects;

(iii) The amount and type of resources and number of experienced staff persons Proposers have committed to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(iv) The recent, current, and projected workloads of the staff and resources referenced in section (4)(a)(B)(iii), above;

(v) The proportion of time Proposers estimate that the staff referenced in section (4)(a)(B)(iii) above would spend on the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(vi) Proposers' demonstrated ability to complete successfully similar Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services on time and within budget, including whether or not there is a record of satisfactory performance under PPS 48-0120 (List of Interest Consultants; Performance Record);

(vii) References and recommendations from past clients;

(viii) Proposers' performance history in meeting deadlines, submitting accurate estimates, producing high quality work, meeting financial obligations, price and cost data from previous projects, cost controls, and contract administration;

(ix) Status and quality of any required license or certification;

(x) Proposers' knowledge and understanding of the project and Architectural, Engineering, and Land Surveying services or Related services described in the RFP as shown in Proposers' approaches to staffing and scheduling needs for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services, and proposed solutions to any perceived design and constructability issues;

(xi) Results from interviews, if conducted;

(xii) Design philosophy, if applicable, and approach to the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP;

(xiii) If the District is selecting a Consultant to provide Related services, pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead; and

(xiv) Any other criteria that the District deems relevant to the project and the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP, including, where the nature and budget of the project so warrant, a design competition between competing Proposers. Provided, however, these additional criteria cannot include pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead, when the sole purpose or predominant purpose of the RFP is to obtain Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services.

(C) Conditions or limitations, if any, that may constrain or prohibit the selected Consultant's ability to provide additional services related to the project, including, but not limited to, construction services;

(D) Whether interviews are possible and if so, the weight, points, or other classifications applicable to the potential interview;

(E) The date and time Proposals are due, and the delivery location for Proposals;

(F) Reservation of the right to seek clarifications of each proposal;

(G) Reservation of the right to negotiate a final Contract that is in the best interest of the District;

(H) Reservation of the right to reject any or all Proposals and reservation of the right to cancel the RFP at any time if doing either would be in the public interest as determined by the District;

(I) A Statement that Proposers responding to the RFP do so solely at their expense, and the District is not responsible for any Proposer expenses associated with the RFP;

(J) A statement directing Proposers to the protest procedures set forth in these division 48 rules;

(K) Special Contract requirements, including but not limited to DBE, MBE, WBE, ESB, and VB participation goals or good faith efforts with respect to DBE, MBE, WBE, ESB, and VB participation, and federal requirements when federal funds are involved;

(A) A statement whether or not the District shall hold a pre-proposal meeting for all interested Consultants to discuss the project and the Architectural, Engineering, Photogrammetric

Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP, and if a pre-proposal meeting will be held, the location of the meeting and whether or not attendance is mandatory;

(B) A request for any information the District deems reasonably necessary to permit the District to evaluate, rank, and select the most qualified Proposer to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP; and

(C) A sample form of the Contract.

(b) RFP Contents for Related Services Selections Based on Price Only. When using the formal selection procedure, the District shall include at least the following in each RFP, whether or not the RFP is preceded by an RFQ, when the formal selection procedure is for Related services selected on the basis of price Proposals and other pricing information only:

(A) General background information, including a description of the project and the specific Related services sought for the project, the estimated project cost, the estimated time period during which the project is to be completed, and the estimated time period in which the specific Related services sought will be performed;

(B) The RFP evaluation process and the price criteria which will be used to select the highest ranked Proposer, including the weights, points or other classifications applicable to each criterion. If the District does not indicate the applicable number of points, weights or other classifications, then each criterion is of equal value. Evaluation price criteria may include, but are not limited to, the total price for the Related services described in the RFP, Consultant pricing policies, and other pricing information such as the Consultant's estimated number of staff hours needed to perform the Related services described in the RFP, expenses, hourly rates and overhead;

(C) Any minimum or pass-fail qualifications that the Proposers shall meet, including but not limited to any such qualifications in the subject matter areas described in section (4)(a)(B)(i) through section (4)(a)(B)(xii) of this rule; and

(D) The information listed in section (4)(a)(C) through section(4)(a)(N) of this rule pertaining to the Related services described in the RFP.

(a) RFP Contents for District Selection of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services with Pricing Policies, Proposals or Other Pricing Information. If the District will be including pricing policies, proposals or other pricing information in the District's formal selection procedure criteria for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services pursuant to ORS 279C.110(5), the District shall meet the following minimum requirements for each RFP:

(A) If the District has used the Request for Qualifications procedure in section (3) of this rule to evaluate potential Consultants and establish a short list of qualified Consultants pursuant to ORS 279C.110(5), the RFP shall meet the requirements of ORS 279C.110(5) that address the second phase of the selection process applicable to the short list of no more than three of the highest ranked prospective consultants that were identified in the initial phase of the selection process described in ORS 279C.110(5)(a) and (b).

(B) If the District has elected to not use the Request for Qualifications procedure in section (3) of this rule, and will use only an RFP in the District's use of the formal selection procedure, the District shall include at least the following in the RFP:

(i) The information set forth in ORS 279C.110(5)(a). In providing an estimate of the cost of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, the District may provide a specific estimate of that cost, or a range of estimated costs;

(ii) (In the initial phase of the RFP, provisions describing the District's evaluation of each prospective Consultant on the basis of each Consultant's qualifications to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, with those qualifications including the criteria set forth in subsections (4)(a)(B)(i) through (4)(a)(B)(xiii) and (4)(a)(B)(xv) of this rule;

(iii) At the end of the initial phase of the RFP, provisions describing the District's evaluation scores of each Consultant and rank of each Consultant according to the evaluation scores. The District shall identify up to three (3) of the highest ranked prospective Consultants as being qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services described in the RFP, and as being eligible to participate in the second phase of the RFP process;

(iv) In the second phase of the RFP, provisions describing the District's request of a pricing proposal from each of the highest ranked prospective Consultants identified in the initial phase of the RFP, pursuant to the requirements of ORS 279C.110(5)(c)(A) and (B);

(v) Provisions describing the District's evaluation of the highest ranked prospective Consultants that have decided to provide price proposals. In the District's final evaluation of the prospective Consultants who have provided price proposals, the District cannot assign more than fifteen (15) percent of the overall weight of the evaluation criteria in the second phase of the RFP to each Consultant's price proposal;

(b) RFP Evaluation Committee. The District shall establish a committee of at least three individuals to review, score, and rank Proposals according to the evaluation criteria set forth in the RFP. If the RFP has followed an RFQ, the District may include the same members who served on the RFQ evaluation committee. The District may appoint to the evaluation committee the District employees or employees of other public agencies with experience in Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying or Related services, construction services, or Public Contracting. At least one member of the evaluation committee shall be a District employee. If the District procedure permits, the District may include on the evaluation committee private practitioners of architecture, engineering, land surveying, or related professions. The District shall designate one of its employees who also is a member of the evaluation committee as the evaluation committee chairperson.

(A) No Proposer will be eligible for award of the Contract under the RFP if Proposer or any of Proposer's principals, partners, or associates are members of the District's RFP evaluation committee for the Contract;

(B) If the RFP provides for the possibility of Proposer interviews, the evaluation committee may elect to interview Proposers if the evaluation committee considers it necessary or desirable. If the evaluation committee conducts interviews, it shall award weights, points, or other classifications indicated in the RFP for the anticipated interview; and

(C) The evaluation committee shall provide to the District the results of the scoring and ranking for each Proposer.

(c) If the District does not cancel the RFP after it receives the results of the scoring and ranking for each Proposer, the District shall begin negotiating a Contract with the highest ranked Proposer. The District shall direct Contract negotiations toward discussing, refining and finalizing the following:

(A) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(B) The Consultant's performance obligations and performance schedule;

(C) Payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services; and

(D) Any other conditions or provisions the District believes to be in the District's best interest to negotiate.

(d) The District shall, either orally or in writing, formally terminate negotiations with the highest ranked Proposer if the District and Proposer are unable for any reason to reach agreement on a Contract within a reasonable amount of time. The District may thereafter negotiate with the second ranked Proposer, and if necessary, with the third ranked Proposer, and so on if applicable, in accordance with section (4)(c) of this rule, until negotiations result in a Contract. If negotiations with any Proposer do not result in a Contract within a reasonable amount of time, the District may end the particular formal solicitation. Nothing in this rule precludes the District from proceeding with a new formal solicitation for the same Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP that failed to result in a Contract.

PPS 48-0230 Ties Among Proposers

(1) If the District is selecting a Consultant on the basis of qualifications alone and determines after the ranking of Proposers that two or more Proposers are equally qualified, the District may select a candidate through any process that the District believes will result in the best value for the District, taking into account the scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services. Provided, however, that the tie-breaking process established by the District under this section (1) cannot be based on pricing policies and pricing Proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead. The process shall be designed to instill public confidence through ethical and fair dealing, honesty, and good faith on the part of the District and Proposers and shall protect the integrity of the Public Contracting process. Once a tie is broken, the District and the selected Proposer shall proceed with negotiations under PPS 48-0210(3) or 48-0220(4)(c), as applicable.

(2) If the District is selecting a Consultant on the basis of price alone, or on the basis of price and qualifications, and determines after the ranking of Proposers that two or more Proposers are identical in terms of price or are identical in terms of price and qualifications, then the District shall follow the procedure set forth in PPS 46-0300 (Preferences for Oregon goods and services) to select the Consultant.

PPS 48-0240 Protest Procedures

(1) **RFP Protest and Request for Change**. Pursuant to ORS 279C.110(8), Consultants may submit a written protest of anything contained in an RFP and may request a change to any provision, specification, or Contract term contained in an RFP, no later than seven (7) calendar days prior to the date Proposals are due,

unless a different deadline is indicated in the RFP. Each protest and request for change shall include the reasons for the protest or request, and any proposed changes to the RFP provisions, specifications, or Contract terms. The District may not consider any protest or request for change that is submitted after the submission deadline.

(2) Protest of Consultant Selection. Pursuant to ORS 279C.110(8), Consultants may submit a written protest of the District's selection of a Consultant for award of a Contract as follows:

(a) Single Award. In the event of an award to a single Proposer, the District shall provide to all Proposers a copy of the selection notice that the District sent to the highest ranked Proposer. A Proposer who claims to have been adversely affected or aggrieved by the selection of the highest ranked Proposer may submit a written protest of the selection to the District no later than seven days after the date of the selection notice, unless a different deadline is indicated in the RFP. A Proposer submitting a protest shall claim that the protesting Proposer is the highest ranked Proposer because the Proposals of all higher ranked Proposers failed to meet the requirements of the RFP, or because the higher ranked Proposers otherwise are not qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP.

(b) Multiple Award. In the event of an award to more than one Proposer, the District shall provide to all Proposers copies of the selection notices that the District sent to the highest ranked Proposers. A Proposer who claims to have been adversely affected or aggrieved by the selection of the highest ranked Proposers may submit a written protest of the selection to the District no later than seven days after the date of the selection notices, unless a different deadline is indicated in the RFP. A Proposer submitting a protest shall claim that the protesting Proposer is one of the highest ranked Proposers because the Proposals of all higher ranked Proposers failed to meet the requirements of the RFP, or because a sufficient number of Proposals of higher ranked Proposers to failed to meet the requirements of the RFP. In the alternative, a Proposer submitting a protest shall claim that the Proposals of all higher ranked Proposers, or a sufficient number of higher ranked Proposers, are not qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the RFP.

(c) Effect of Protest Submission Deadline. The District may not consider any protest that is submitted after the submission deadline.

(3) Resolution of Protests. A duly authorized representative of the District shall resolve all timely submitted protests within a reasonable time following the District's receipt of the protest, and once resolved, shall promptly issue a written decision on the protest to the Proposer who submitted the protest. If the protest results in a change to the RFP, the District shall revise the RFP accordingly and shall re-advertise the RFP in accordance with these rules.

PPS 48-0250 Solicitation Cancellation, Delay, or Suspension; Rejection of All Proposals or Responses; Consultant Responsibility for Costs

The District may cancel, delay, or suspend a solicitation, RFQ, or other preliminary procurement document, whether related to a Direct Appointment Procedure (PPS 48-0200), Informal Selection Procedure (PPS 48-0210), or a Formal Selection Procedure (PPS 48-0200), or reject all Proposals, responses to RFQs, responses to other preliminary procurement documents, or any combination of the foregoing, if the District believes it is in the public interest to do so. In the event of any such cancellation, delay, suspension, or rejection, the District is not liable to any Proposer for any loss or expense caused by or resulting from any such cancellation, delay, suspension, or rejection. Consultants responding to either solicitations, RFQs, or other preliminary procurement documents are responsible for all costs they may incur in connection with submitting Proposals, responses to RFQs, or responses to other preliminary procurement documents.

PPS 48-0260 Two-Tiered Selection Procedure for District Public Improvement Projects

(1) If the District requires an Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for a public improvement that is owned and maintained by the District and a State Agency will serve as the lead, the District shall enter into Contracts with Architects, Photogrammetrists, Transportation Planners, Engineers, or Land Surveyors for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for that public improvement, and the State Contracting Agency shall utilize the two-tiered selection process described below to obtain these Contracts with Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors.

(2) **Tier One**. State that the District shall, when feasible, identify no fewer than the three (3) most qualified Proposers responding to an RFP that was issued under the applicable selection procedures described in PPS 48-0210 (Informal Selection Procedures) and 48-0220 (Formal Selection Procedures), or from among Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors identified under PPS 48-0200 (Direct Appointment Procedure), and shall notify the District of the Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors selected.

(3) **Tier Two**. In accordance with the qualifications-based selection requirements of ORS 279C.110, the District shall either:

(a) Select an Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor from the State Contracting Agency's list of Proposers to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for the District's public improvement; or

(b) Select an Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for the District's Public Improvement through an alternative process adopted by the District consistent with the provisions of the applicable RFP, if any, and these division 48 rules. The District's alternative process shall be described in the applicable RFP, may be structured to take into account the unique circumstances of the District, and may include provisions to allow the District to perform its tier-two responsibilities efficiently and economically, alone or in cooperation with other Local Contracting Agencies. The District's alternative process may include, but is not limited to, one or more of the following methods:

(A) A general written direction from the District to the State Contracting Agency, prior to the advertisement of a procurement or series of procurements, or during the course of the procurement or series of procurements, that the District's tier two selection shall be the highest ranked firm identified by the State Contracting Agency during the tier one process, and that no further coordination or consultation with the District is required. However, the District may provide written notice to the State Contracting Agency that the District's general written direction is not to be applied for a particular procurement and describe the process that the District shall utilize for the particular procurement. In order for a written direction from the District consistent with this section to be effective for a particular procurement, it shall be received by the Contracting Agency with adequate time for the State Contracting Agency to revise the RFP in order for Proposers to be notified of the tier two process to be utilized in the procurement. In the event of a multiple award under the terms of the applicable procurement, the written direction from the District may apply to the highest ranked Proposers that are selected under the terms of the procurement document.

(B) An intergovernmental agreement between the District and the Contracting Agency outlining the alternative process that the District has adopted for a procurement or series of procurements.

(C) Where multiple Local Government Contracting Agencies are involved in a two-tiered selection procedure, the Local Government Contracting Agencies may name one or more authorized representative(s) to act on behalf of all the Local Government Contracting Agencies, whether the Local Government Contracting Agencies are acting collectively or individually, to select the Architect, Engineer, Photogrammetrist, Transportation Planner, or Land Surveyor to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under the tier two selection process. In the event of a multiple award under the terms of the applicable procurement, the authorized representative(s) of the Local Contracting Agencies may act on behalf of the District to select the highest ranked firms that are required under the terms of the procurement document, as part of the tier two selection process.

(4) In the event the State Contracting Agency has made a multiple award of Price Agreements pursuant to OAR 137-048-0270, with that multiple award of Price Agreements meeting the tier-one requirements of ORS 279C.125 and this rule, the District shall make its tier-two selection of an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor for a project-specific work order or task order from the Consultants who have executed Price Agreements with the State Contracting Agency, in accordance with the work order or task order assignment procedures established by the State Contracting Agency in the Price Agreements. If the District elects to select an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services for District's public improvement through an alternative process adopted by the District, the requirements of that alternative process shall be specified in the RFP, if any, in the executed Price Agreements, or in the project-specific work order or task order assignment procedures provided to the Consultants who have executed Price Agreements, at the time the selection of a Consultant is made for the project-specific work order or task order.

(5) The State Contracting Agency shall thereafter begin Contract negotiations with the selected Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor in accordance with the negotiation provisions in PPS 48-0200 (Direct Appointment Procedure), 48-0210 (Informal Selection Procedure, or 48-0220 (Formal Selection Procedure) as applicable.

(6) Nothing in these division 48 rules should be construed to deny or limit the District's ability to contract directly with Architects, Engineers, Photogrammetrists, Transportation Planners, or Land Surveyors pursuant to ORS 279C.125(4) through a selection process established by the District.

PPS 48-0270 Price Agreements

(1) The District may establish Price Agreements for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services when the District cannot determine the precise quantities of those services which the District shall require over a specified time period.

(2) When establishing Price Agreements under this rule, the District shall select no fewer than three Consultants, when feasible. The selection procedures for establishing Price Agreements shall be in accordance with PPS 48-0130(1) or 48-0130(2), as applicable. The District may select a single Consultant when a Price Agreement is awarded to obtain services for a specific project or a closely-related group of projects.

(3) In addition to any other applicable solicitation requirements set forth in these division 48 rules, solicitation materials and the terms and conditions for a Price Agreement for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services shall:

(a) Include a scope of services, menu of services, a specification for services or a similar description of the nature, general scope, complexity, and purpose of the procurement that will reasonably enable a prospective bidder or Proposer to decide whether to submit a bid or proposal;

(b) Specify whether the District intends to award a Price Agreement to one Consultant or to multiple Consultants. If the District shall award a Price Agreement to more than one Consultant, the Solicitation Document and Price Agreement shall describe the criteria and procedures the District shall use to select a Consultant for each individual work order or task order. Subject to the requirements of ORS 279C.110, the criteria and procedures to assign work orders or task orders that only involve or predominantly involve Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services are at the District's sole discretion; provided, however, in circumstances where a direct contract is not permitted under PPS 48-0200 and a state agency is conducting the solicitation, the selection criteria cannot be based on pricing policies, pricing proposals, or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates, and overhead. In accordance with PPS 48-0130(2) applicable to Related services procurements, the selection criteria and procedures may be based solely on the qualifications of the Consultants, solely on pricing information, or a combination of both qualifications and pricing information. Pricing information for the District's solicitation of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services, or any Contracting Agency's solicitation of Related services, may include the number of hours proposed for the Related services required, expenses, hourly rates, the number of hours, overhead, and other price factors. Work order or task order assignment procedures under Price Agreements may include direct appointments, subject to the requirements of PPS 48-0200; and

(c) Specify the maximum term for assigning Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under the Price Agreement.

(4) When the Solicitation materials and terms and conditions for a Price Agreement involve a two-tiered selection process pursuant to ORS 279C.125 and OAR 137-048-0260(1), the Solicitation materials and terms and conditions for a Price Agreement shall meet the requirements of subsection (3) of this rule, except as provided in this subsection (4). In the event of a planned multiple award of Price Agreements under a procurement, the Solicitation materials and terms and conditions for the Price Agreements shall include assignment procedures for project-specific work orders or task orders that will allow the District to select an Architect, Engineer, Photogrammetrist, Transportation Planner or Land Surveyor for a work order or task order from the Consultants who have executed Price Agreements with the State Contracting Agency. If the District decides to use an alternative process adopted by the District for its tier-two selection process, however, the District's alternative process shall be described in the Solicitation materials and terms and conditions supporting the initial award of Price Agreements, in the executed Price Agreements, or in the project-specific assignment procedures for a work order or task order that are provided to the firms who have executed Price Agreements, at the time of selection for the project-specific work order or task order. The District's alternative process may be structured to take into account the unique circumstances of the District and may include provisions to allow the District to perform its tier two responsibilities efficiently and economically, alone or in cooperation with other Local Contracting Agencies, including, but not limited to, the methods specified in PPS 48-0260(3)(b).

(5) All Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services assigned under a Price Agreement require a written work order or task order issued by the District. Any work orders or task orders assigned under a Price Agreement shall include, at a minimum, the following:

(a) The specific scope of Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services to be provided by the Consultant;

(b) The Consultant's performance obligations and performance schedule;

(c) The payment methodology, Consultant's rates and number of hours, and a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the work order or task order that is fair and reasonable to the District, as determined solely by the District, taking into account the value, scope, complexity, and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services;

(d) Language that incorporates all applicable terms and conditions of the Price Agreement into the work order or task order; and

(e) Any other provisions the District believes to be in the District's best interest.

PPS 48-0280 FSCP

The Superintendent may establish an FSCP for a particular class of Architectural, Engineering, Land Surveying or Related services where the need for such services is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

(1) Solicitation to Create an FSCP. An FSCP can be established pursuant to an RFQ, an RFP, competitive quotes, or such other method of competitive procurement as the Superintendent deems to be appropriate given the services to be procured.

(a) The Superintendent shall document the reasons for establishing an FSCP consistent with this rule in the Solicitation file. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(b) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside of the designated class of Contracts to the FSCP.

(c) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(d) The solicitation may request a binding Price quote or rate that will become part of a subsequent Contract or may establish the pool based on qualifications alone.

(e) The solicitation may set or limit the value of the work to be performed by the FSCP.

(2) Contracting for Work From an FSCP.

(a) Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform individual projects within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual projects will be offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the Superintendent has Offered Work to all the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer), a new random FSCP list will be generated. The Superintendent may Offer Work out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for Work that is a continuation of, addition to, or is connected with Work previously performed by a Contractor on the list, and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability is required. In order to make this determination, the Superintendent shall conduct an informal procurement pursuant to PPS 46-0510 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(b) An FSCP established under this section will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(c) Appointment to an FSCP does not guarantee that a Contractor will receive a particular amount of work or any Work at all.

(d) The establishment of an FSCP does not preclude the Superintendent from procuring Work that would otherwise fall within the FSCP class of work from other Contractors through any other procurement method authorized under these rules.

(e) At any time during the term of an FSCP, the Superintendent may request confirmation from a Contractor or Contractors in the pool that the Contractor continues to maintain the skills, personnel, or other capability needed to perform the class of work.

POST-SELECTION CONSIDERATIONS

PPS 48-0300 Prohibited Payment Methodology; Purchase Restrictions

(1) Except as otherwise allowed by law, a Contracting Agency shall not enter into any Contract which includes compensation provisions that expressly provide for payment of:

(a) Consultant's costs under the Contract plus a percentage of those costs; or

(b) A percentage of the project construction costs or total project costs.

(2) Except as otherwise allowed by law, the District shall not enter into any Contract in which:

(a) The compensation paid under the Contract is solely based on or limited to the Consultant's hourly rates for the Consultant's personnel working on the project, and reimbursable expenses incurred during the performance of work on the project (sometimes referred to as a "time and materials" Contract); and

(b) The Contract does not include a maximum amount payable to the Consultant for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract.

(3) Except in cases of Emergency or in the particular instances noted in the subsections below, the District shall not purchase any building materials, supplies, or equipment for any building, structure, or facility constructed by or for the District from any Consultant under a Contract with the District to perform Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services

or Related services for the building, structure, or facility. This prohibition does not apply if either of the following circumstances exists:

(a) Consultant is providing Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services under a Contract with the District to perform Design-Build services or Energy Savings Performance Contract services (see PPS 49-0670 and 49-0680); or

(b) That portion of the Contract relating to the acquisition of building materials, supplies, or equipment was awarded to Consultant pursuant to applicable law governing the award of such a Contract.

PPS 48-0310 Expired or Terminated Contracts; Reinstatement

(1) If the District enters into a Contract for Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services and that Contract subsequently expires or is terminated, the District may proceed as follows, subject to the requirements of section (2) of this rule:

(a) Expired Contracts. If the Contract has expired as the result of project delay caused by the District or caused by any other occurrence outside the reasonable control of the District or the Consultant, and if no more than one year has passed since the Contract expiration date, the District may amend the Contract to extend the Contract expiration date, revise the description of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services required under the Contract to reflect any material alteration of the project made as a result of the delay, and revise the applicable performance schedule. Beginning on the effective date of the amendment, the District and the Consultant shall continue performance under the Contract as amended; or

(b) Terminated Contracts. If the District or both parties to the Contract have terminated the Contract for any reason and if no more than one year has passed since the Contract termination date, then the District may enter into a new Contract with the same Consultant to perform the remaining Architectural, Engineering and Land Surveying services or Related services not completed under the original Contract, or to perform any remaining Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services not completed under the Contract as adjusted to reflect a material alteration of the project.

(2) The District may proceed under either subsection (1)(a) or subsection (1)(b) of this rule only after making written findings that amending the existing Contract or entering into a new Contract with the Consultant will:

(a) Promote efficient use of public funds and resources and result in substantial cost savings to the District;

(b) Protect the integrity of the Public Contracting process and the competitive nature of the procurement process by not encouraging favoritism or substantially diminishing competition in the award of Contracts; and

(c) Result in a Contract that is still within the scope of the final form of the original procurement document.

PPS 48-0320 Contract Amendments

(1) The District may amend any Contract if the District, in its sole discretion, determines that the amendment is within the scope of the Solicitation Document and that the amendment would not materially impact the field of competition for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying services or Related services described in the final form of the

original procurement document. In making this determination, the District shall consider potential alternative methods of procuring the services contemplated under the proposed amendment. An amendment would not materially impact the field of competition for the services described in the Solicitation Document if the District reasonably believes that the number of Proposers would not significantly increase if the procurement document were re-issued to include the additional services.

(2) The District may amend any Contract if the additional services are required by reason of existing or new laws, rules, regulations, or ordinances of federal, state, or local agencies which affect performance of the Original Contract.

(3) All amendments to Contracts shall be in writing, shall be signed by an authorized representative of the Consultant and the District, and shall receive all required approvals before the amendments will be binding on the District.

(4) Amendments That Would Cause a Contract to Exceed the Superintendent's Authority. An amendment to a contract approved by the Superintendent that would cause the total Contract Price to exceed the Superintendent's delegated authority to approve contracts under PPS 45-0200 shall be approved by the School Board except as provided in PPS 45-0200.

~~**(5) Reporting Requirement for Amendments/Change Orders That Exceed 125 Percent of Original Contract Price**.~~

(a) ~~A Contract Amendment or Change Order or cumulative Contract Amendments or Change Orders that increase the total Contract Price to greater than 125 percent of the original Contract Price shall be reported to the School Board, except in any of the following circumstances:~~

~~**(A)** The Original Contract Price does not exceed $500,000.~~

~~**(B)** The Superintendent determines that the Amendment, additional scope, or alternative work was contemplated in the original procurement and provided for in the original Contract, and the School Board previously approved the entire scope and/or maximum renewal terms. (Examples include a solicitation and contract that provides for renewal or extension for subsequent terms or a contract that specifically allows for alternates or additional work.)~~

(b) ~~Contracts subject to the reporting requirement under this Rule shall be reported to the School Board a second time if subsequent Amendments or Change Orders increase the total Contract Price to greater than 150 percent of the original Contract Price.~~

(c) ~~Contracts subject to the reporting requirement under this Rule shall be reported to the Board at the next regular business meeting of the Board following approval of the amendment or change triggering the reporting requirement. The report shall include an explanation of the basis for the amendment or change order.~~

END OF DIVISION 48

PPS DIVISION 49

DISTRICT PUBLIC CONTRACTING RULES FOR CONTRACTS FOR PUBLIC IMPROVEMENTS AND/OR PUBLIC WORKS

PPS 49-0100 Application

(1) These division 49 rules apply to Public Improvement Contracts as well as Public Contracts for ordinary construction services that are not Public Improvements. The rules that apply specifically to Public Improvement Contracts are so identified. These division 49 rules apply to Contracts for Construction Manager/General Contractor services, whether the initial Contract between the parties includes both pre-construction services and construction services, or only contains pre-construction services, since the underlying procurement for Construction Manager/General Contractor services authorizes the District to enter into Contracts for both pre-construction and construction services.

(2) These division 49 rules address matters covered in ORS Chapter 279C (with the exception of Architectural, Engineering, Land Surveying and Related services, all of which are addressed in division 48 of the rules).

PPS 49-0110 Policies

In addition to the general Code policies set forth in ORS 279A.015, the 279C.300 policy on competition and the 279C.305 policy on least-cost for Public Improvements apply to these division 49 rules.

PPS 49-0120 Definitions

(3) **Conduct Disqualification** means a Disqualification under ORS 279C.440 in accordance with PPS 49-0370.

(4) **Disqualification** means the preclusion of a Person from contracting with the District for a period of time in accordance with PPS 49-0370.

(5) **Foreign Contractor** means a Contractor that is not domiciled in or registered to do business in the State of Oregon. See PPS 49-0490.

(6) **Notice** means any of the alternative forms of Public announcement of procurements, as described in PPS 49-0210.

(7) **Work** means the furnishing of all services, materials, equipment, labor and incidentals necessary to successfully complete any individual item or the entire Contract and the carrying out and completion of all duties and obligations imposed by the Contract.

PPS 49-0130 Competitive Bidding Requirement

The District shall solicit Bids for Public Improvement Contracts by Invitation to Bid ("ITB"), except as otherwise allowed or required pursuant to ORS 279C.335 on competitive bidding exceptions and exemptions, ORS 279A.030 on federal law overrides, or ORS 279A.100 on affirmative action. Also see PPS 49-0600 through 49-0690 regarding the use of Alternative Contracting Methods, use of Alternative Contracting Methods for projects which are excepted or exempt from the competitive bidding process, use of Alternative Contracting Methods within the competitive bidding process and the process for obtaining an exemption from competitive bidding requirements.

PPS 49-0140 Contracts for Construction Other Than Public Improvements

(1) **Procurement Under ORS Chapter 279B**. Pursuant to ORS 279C.320, Public Contracts for construction services that are not Public Improvement Contracts may be procured and amended as general trade services under the provisions of ORS 279B rather than under the provisions of ORS 279C and these division 49 rules.

(2) Emergency Construction Contracts. Emergency Contracts for construction services are not Public Improvement Contracts and are regulated under ORS 279B.080. See PPS 49-0150.

(3) Application of ORS Chapter 279C. Non-procurement provisions of ORS Chapter 279C and these division 49 rules may still be applicable to the resulting Contracts. See, for example, particular statutes on Disqualification (279C.440, 445, 450); Legal Actions (279C.460 and 465); Required Contract Conditions 279C.505, 515, 520, and 530); Hours of Labor (279C.540 and 545); Retainage (279C.550, 560, 565 and 570); Subcontracts (279C.580); Action on Payment Bonds (279C.600, 605, 610, 615, 620, 625); Termination (ORS 279C.650, 655, 660, 670); and all of the Prevailing Wage Rates requirements (279C.800 through .870) for Public Works Contracts.

PPS 49-0146 Class Exemptions; Public Improvement Contracts

The Local Contract Review Board declares the following Contracts listed in this section as classes of Public Improvement Contracts exempt from competitive bidding.

(1) Donated Public Improvements. The Superintendent may authorize a Person to construct a Public Improvement without competitive Bidding or other competitive process and regardless of dollar amount, if:

- **(a)** The Person has agreed to donate all or a significant portion of the materials or services necessary to construct the Public Improvement or perform the service; and
- **(b)** The Person enters into a license or agreement with the District whereby the Person agrees to comply with the Public Contract requirements applicable to the particular project and any requirements that the District deems necessary or beneficial to protect the District.

(2) Benson House Program Contracts. The Superintendent may directly negotiate a Public Improvement Contract without complying with the competitive procurement requirements of these rules where the Contract is for the purpose of supporting the Benson Polytechnic High School Building Construction Class, and all or a portion of the Contract Price is discounted or donated to the District.

(3) Purchases Under Contracts Solicited by Nonprofit Procurement Organizations of Which the District Is a Member. The Superintendent may purchase Public Improvements under a Contract or procurement solicited by a Nonprofit Procurement Organization of which it is a member. For the purposes of this Special procurement, such a Nonprofit Procurement Organization will be considered a "Contracting Purchasing Group" under PPS 46-0400 through 46-0480, and a procurement shall comply with the requirements for Joint Cooperative Procurements pursuant to PPS 46-0420.

(4) FSCP. The Superintendent may establish an FSCP for a particular class of Public Improvements where the need for such Work is ongoing in nature, where it is difficult to anticipate the service need, time, amount, or availability of Contractors, or where service needs arise so quickly that it is not practical or cost-effective to conduct individual solicitations under these rules. An FSCP shall comply with the following requirements:

- **(a)** Solicitation to Create an FSCP. An FSCP for Public Improvements shall be solicited based on the total cost of the work estimated to be awarded through the FSCP during its life. If the total amount of the work is estimated to be over $100,000, the Superintendent shall use a formal RFQ process pursuant to PPS 49-0645 or an RFP process pursuant to PPS 49-0650. If the total amount of the work is $100,000 or less, the FSCP may be solicited pursuant to the intermediate procurement process set forth in PPS 49-0160.
  - **(A)** The Superintendent shall document the reasons for establishing an FSCP consistent with this rule in the Solicitation file. This documentation shall be reviewed and approved by the Director of procurement as demonstrating that the procurement qualifies for use of an FSCP under these rules.

(B) The solicitation shall describe the class of Contracts that can be awarded to Contractors in the FSCP. The District may not award Contracts outside of the designated class of Contracts to the FSCP.

(C) The solicitation shall set forth the number of Contractors that will be appointed to the FSCP, the selection criteria, and the methodology for ranking the requests and selecting the Contractors to be appointed to the pool.

(D) The solicitation may request a binding Price quote or time and materials rate that will become part of a subsequent Contract or may establish the pool based on qualification alone.

(E) The solicitation may set or limit the value of the work performed by the FSCP.

(b) Contracting for Work from an FSCP. Once an FSCP has been established, the Superintendent may negotiate Contracts directly with Contractors in the pool to perform specific Work within the established scope of the work. Upon creation of the FSCP, the Superintendent will generate a random list of names of the Contractors appointed to the FSCP. Contracts for individual Work will be Offered, negotiated, and awarded sequentially to Contractors on the FSCP list. Once the Superintendent has Offered a Contract to all the Contractors in the FSCP (whether or not some or all of the Contractors have accepted the Offer), a new random FSCP list will be generated. The Superintendent may offer a Contract to Contractors out of sequence in the following circumstances:

(A) The Contractor that is next on the list declines or is unavailable during the time period needed.

(B) Contract negotiations with the next-listed Contractor are not successful.

(C) The project is for a Public Improvement that is a continuation of, an addition to, or connected with a Public Improvement previously constructed by a Contractor on the list, and such prior experience means that it is in the best interest of the District to award the Contract to the Contractor that performed the prior Work or provided the prior goods.

(D) The nature of the project is such that the Superintendent determines that an additional analysis of Contractor capability or capacity is required. In order to make this determination, the Superintendent shall conduct an intermediate procurement pursuant to PPS 49-0160 limited to Contractors in the FSCP.

If a Contractor is selected outside of the sequence, the reason shall be documented in writing in the Solicitation file.

(c) An FSCP established under this section will expire after three years from the date of Closing of the Solicitation, unless reestablished as provided in this rule.

(d) Appointment to an FSCP does not guarantee that a contractor will receive a particular amount of work or orders or any work or orders at all.

(e) The establishment of an FSCP does not preclude the Superintendent from procuring public improvements that would otherwise fall within the FSCP from other contractors through any other procurement method authorized under these rules.

(f) At any time during the term of an FSCP, the Superintendent may request confirmation from a contractor or contractors in the pool that the Contractor continues to maintain the skills, personnel, inventory or other capability needed to perform the class of work or provide the required goods.

(g) If an FSCP for public improvements is reasonably estimated to include projects that will total over $50,000 during the life of the FSCP, public improvement contracts awarded to Contractors

on an FSCP list shall require the payment of prevailing wages pursuant to ORS 279C.800 through 279C.870.

(5) Price Agreements.

(a) Price Agreements may be established for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining District requirements for volume discounts, creating standardization among agencies, and reducing lead time for ordering. The Superintendent may enter into Price Agreements to purchase Public Improvements for an anticipated need at a predetermined price, but the Contract shall be solicited by a competitive procurement process pursuant to the requirements of these rules based on the total Contract Price.

(b) The Superintendent may purchase Public Improvements from a Contractor awarded a Price Agreement without first undertaking additional competitive solicitation up to the amount set forth in the Price Agreement.

(c) The Superintendent may use the Price Agreement entered into by another Oregon Public Agency when the Original Contract was let pursuant to PPS 46-0420.

(d) The term of the Price Agreement, including renewals, may not exceed the term stated in the original solicitation.

(e) If a Price Agreement for Public Improvements will exceed $50,000 over the term of the Agreement, the Contract shall require the payment of prevailing wages pursuant to ORS 279C.800 through 279C.870.

(6) Expedited Contracting Process in Order to Access State, Federal, or Grant Funding. The Superintendent may waive any or all of the Solicitation procedures under this division 49 in the following circumstances:

(a) The state or federal government or granting entity has adopted a funding program or made funding available to assist the District in constructing Public Improvements and has attached a time deadline to have a Contract in place, a project underway, or a project completed in order for the District to access or be eligible for those funds. Such programs include, without limitation, the American Recovery and Reinvestment Act of 2009 ("ARRA") and similar programs.

(b) The Superintendent determines that compliance with the Solicitation procedures in this division 49 could jeopardize the District's ability to access or be eligible for such funding under the timeline established by the state or federal government or granting entity.

(c) The Superintendent provides for an alternative contracting process.

(d) The reasons for and extent of the waiver are documented in the Solicitation file.

(e) Notwithstanding PPS 45-0200, the School Board hereby authorizes the Superintendent to enter into and approve payment on Contracts subject to this exemption in any dollar amount, but will report the nature and amount of the Contract to the School Board if the Contract is over the Superintendent's delegated authority as set forth in PPS 45-0200(4)(b)(A).

PPS 49-0150 Emergency Contracts; Bidding and Bonding Exemptions

(1) Emergency Declaration. The Superintendent may declare that Emergency circumstances exist that require prompt execution of a Public Contract for Emergency construction or repair Work. The declaration shall be by a written declaration that describes the circumstances creating the Emergency and the anticipated harm from failure to enter into an Emergency Contract. The Emergency declaration shall be kept on file as a public record.

(2) Competition for Emergency Contracts. Pursuant to ORS 279C.320(1), Emergency Contracts are regulated under ORS 279B.080, which provides that, for an Emergency Procurement of construction services, the District shall ensure competition that is reasonable and appropriate under the Emergency circumstances, and may include written requests for Offers, oral requests for Offers, or direct appointments without competition in cases of extreme necessity, in whatever solicitation time periods the Superintendent considers reasonable in responding to the Emergency.

(3) Emergency Contract Scope. Although no dollar limitation applies to Emergency Contracts, the scope of the Contract shall be limited to Work that is necessary and appropriate to remedy the conditions creating the Emergency as described in the declaration.

(4) Emergency Contract Modification. Emergency Contracts may be modified by change order or amendment to address the conditions described in the original declaration or an amended declaration that further describes additional Work necessary and appropriate for related Emergency circumstances. Emergency contract modifications are not subject to the requirements or limitations of PPS 47-0800 or PPS 49-0910.

(5) Excusing Bonds. Pursuant to ORS 279C.380(4) and this rule, the Emergency declaration may also state that the District waives the requirement of furnishing a performance bond and payment bond for the Emergency Contract. After making such an Emergency declaration, those bonding requirements are excused for the procurement, but this Emergency declaration does not affect the separate Public Works bond requirement for the benefit of BOLI in enforcing prevailing wage rate and overtime payment requirements. See PPS 49-0815 and BOLI rules at OAR 839-025-0015.

PPS 49-155 Small Procurements. A public improvement contract with a value less than $25,000 may be solicited by any method that the Superintendent deems in the best interests of the District, including direct negotiation.

PPS 49-0160 Intermediate Procurements; Competitive Quotes and Amendments

(1) General. Public Improvement Contracts estimated by the District not to exceed $100,000 may be awarded in accordance with intermediate level procurement procedures for competitive quotes established by this rule.

(2) Selection Criteria. The selection criteria may be limited to price or some combination of price, experience, specific expertise, availability, project understanding, contractor capacity, responsibility, and similar factors.

(3) Request for Quotes. The District shall utilize written requests for quotes whenever reasonably practicable. Written requests for quotes shall include the selection criteria to be utilized in selecting a Contractor and, if the criteria are not of equal value, their relative value or ranking. When requesting quotations orally, prior to requesting the price quote the District shall state any additional selection criteria and, if the criteria are not of equal value, their relative value. For Public Works Contracts, oral quotations may be utilized only in the event that written copies the prevailing wage rates are not required by BOLI (e.g., if the total project cost is $50,000 or less or is not otherwise subject to payment of prevailing wages).

(4) Number of Quotes; Record Required. The District shall seek at least three competitive quotes and keep a written record of the sources and amounts of the quotes received. If three quotes are not reasonably available, the District shall make a written record of the effort made to obtain those quotes.

(5) Award. If awarded, the District shall award the Contract to the prospective Contractor whose quote will best serve the interests of the District, taking into account the announced selection criteria. If award is not made to the Offeror offering the lowest price, the District shall make a written record of the basis for award.

(6) Amendments. Amendments of Intermediate-level Public Improvement Contracts that exceed the thresholds stated in section (1) of this rule are specifically authorized by the Code when made in accordance with PPS 49-0910. Accordingly, such amendments are not considered new procurements and do not require an exemption from competitive bidding.

FORMAL PROCUREMENT RULES

PPS 49-0200 Solicitation Documents; Required Provisions; Assignment or Transfer

(1) Solicitation Document. Pursuant to ORS 279C.365 and this rule, the Solicitation Document shall include the following:

(a) General Information.

(A) Identification of the Public Improvement project, including the character of the work, and applicable plans, specifications, and other Contract documents;

(B) Notice of any pre-Offer conference as follows:

(i) The time, date, and location of any pre-Offer conference;

(ii) Whether attendance at the conference will be mandatory or voluntary; and

(iii) That statements made by the District's representatives at the conference are not binding on the District unless confirmed by written Addendum.

(C) The deadline for submitting mandatory prequalification applications and the class or classes of work for which Offerors shall be prequalified if prequalification is a requirement;

(D) The name and title of the District official designated for receipt of Offers and contact Person (if different);

(E) Instructions and information concerning the form and submission of Offers, including the address of the office to which Offers shall be delivered, any bid or proposal security requirements, and any other required information or special information, e.g., whether Offers may be submitted by facsimile or electronic means (See PPS 49-0300 regarding facsimile Bids or Proposals and PPS 49-0310 regarding electronic procurement);

(F) The time, date, and place of Opening;

(G) The time and date of Closing after which the District shall not accept Offers, which time shall be not less than five days after the date of the last publication of the advertisement. Although a minimum of five days is prescribed, the District is encouraged to use at least a 14-day solicitation period when feasible. If the District is issuing an ITB that may result in a Public Improvement Contract with a value in excess of $100,000, the District shall designate a time of Closing consistent with the first-tier subcontractor disclosure requirements of ORS 279C.370(1)(b) and PPS 49-0360. For timing issues relating to Addenda, see PPS 49-0250;

(H) The office where the specifications for the work may be reviewed;

(I) A statement that each bidder to an ITB shall identify whether the bidder is a "resident bidder," as defined in ORS 279A.120;

(J) If the Contract resulting from a solicitation will be a Contract for a Public Work subject to ORS 279C.800 to 279C.870 or the Davis-Bacon Act (40 U.S.C. 3141 to 3148), a statement that no Offer will be received or considered by the District unless the Offer contains a statement by the Offeror as a part of its Offer that "Contractor agrees to be bound by and will comply with the provisions of ORS 279C.838, 279C.840, or 40 U.S.C. 3141 to 3148";

(K) A statement that the District shall not receive or consider an Offer for a Public Improvement Contract unless the Offeror is registered with the Construction Contractors Board or is licensed by the State Landscape Contractors Board as specified in PPS 49-0230;

(L) Whether a Contractor or a subcontractor under the Contract shall be licensed under ORS 468A.720 regarding asbestos abatement projects;

(M) Contractor's certification of nondiscrimination in obtaining required subcontractors in accordance with ORS 279A.110(4) (see PPS 49-0440(3));

(N) How the District shall notify Offerors of Addenda and how the District shall make Addenda available (see PPS 49-0250); and

(O) When applicable, instructions and forms regarding First-Tier Subcontractor Disclosure requirements, as set forth in PPS 49-0360.

(b) Evaluation Process.

(A) A statement that the District may reject any Offer not in compliance with all prescribed Public Contracting procedures and requirements, including the requirement to demonstrate the bidder's responsibility under ORS 279C.375(3)(b), and may reject for Good Cause all Offers after finding that doing so is in the public interest.

(B) The anticipated solicitation schedule, deadlines, protest process, and evaluation process, if any;

(C) Evaluation criteria, including the relative value applicable to each criterion, that the District shall use to determine the Responsible bidder with the lowest Responsive Bid (where award is based solely on price) or the Responsible Proposer or Proposers with the best Responsive proposal or Proposals (where use of competitive Proposals is authorized under ORS 279C.335 and PPS 49-0620), along with the process the District shall use to determine acceptability of the work;

(D) If the Solicitation Document is an Invitation to Bid, the District shall set forth any special price evaluation factors in the Solicitation Document. Examples of such factors include, but are not limited to, conversion costs, transportation cost, volume weighing, trade-in allowances, cash discounts, depreciation allowances, cartage penalties, and ownership or life cycle Cost formulas. Price evaluation factors need not be precise predictors of actual future costs; but to the extent possible, such evaluation factors shall be objective, reasonable estimates based on information the District has available concerning future use; and

(E) If the Solicitation Document is a Request for proposal, the District shall refer to the additional requirements of PPS 49-0650; and

(c) Contract Provisions. The District shall include all Contract terms and conditions, including warranties, insurance, and bonding requirements, that the District considers appropriate for the Public Improvement project. The District shall also include all applicable Contract provisions required by Oregon law as follows:

(A) Prompt payment to all Persons supplying labor or material, contributions to Industrial Accident Fund, and liens and withholding taxes (ORS 279C.505(1));

(B) Demonstrate that an employee drug testing program is in place (ORS 279C.505(2));

(C) If the Contract calls for demolition Work described in ORS 279C.510(1), a condition requiring the Contractor to salvage or recycle construction and demolition debris, if feasible and cost-effective;

(D) If the Contract calls for lawn or landscape maintenance, a condition requiring the Contractor to compost or mulch yard waste material at an approved site, if feasible and cost-effective (ORS 279C.510(2);

(E) Payment of claims by public officers (ORS 279C.515(1));

(F) Contractor and first-tier subcontractor liability for late payment on Public Improvement Contracts pursuant to ORS 279C.515(2), including the rate of interest;

(G) Person's right to file a complaint with the Construction Contractors Board for all Contracts related to a Public Improvement Contract (ORS 279C.515(3));

(H) Hours of labor in compliance with ORS 279C.520;

(I) Environmental and natural resources regulations (ORS 279C.525);

(J) Payment for medical care and attention to employees (ORS 279C.530(1);

(K) A Contract provision substantially as follows: "All employers, including Contractor, that employ subject workers who work under this Contract in the State of Oregon shall comply with ORS 656.017 and provide the required workers' compensation coverage, unless such employers are exempt under ORS 656.126. Contractor shall ensure that each of its subcontractors complies with these requirements." (ORS 279C.530(2));

(L) Maximum hours, holidays, and overtime (ORS 279C.540);

(M) Time limitation on claims for overtime (ORS 279C.545);

(N) Prevailing wage rates (ORS 279C.800 through 279C.870);

(O) BOLI Public Works bond (ORS 279C.830(2)

(P) Retainage (ORS 279C.550 through 279C.570);

(Q) Prompt payment policy, progress payments, rate of interest (ORS 279C.570);

(R) Contractor's relations with subcontractors (ORS 279C.580);

(S) Notice of claim (ORS 279C.605);

(T) Contractor's certification of compliance with the Oregon tax laws in accordance with ORS 305.385; and

(U) Contractor's certification that all subcontractors performing Work described in ORS 701.005(2) (i.e., construction Work) will be registered with the Construction Contractors Board or licensed by the State Landscape Contractors Board in accordance with ORS 701.035 through 701.055 before the subcontractors commence Work under the Contract.

(2) Assignment or Transfer Restricted. Unless otherwise provided in the Contract, the Contractor shall not assign, sell, dispose of or transfer rights, or delegate duties under the Contract, either in whole or in part, without the District's prior written consent. Unless otherwise agreed by the District in writing, such consent shall not relieve the Contractor of any obligations under the Contract. Any assignee or transferee shall be considered the agent of the Contractor and be bound to abide by all provisions of the Contract. If the District consents in writing to an assignment, sale, disposal, or transfer of the Contractor's rights or delegation of Contractor's duties, the Contractor and its surety, if any, shall remain liable to the District for complete performance of the Contract as if no such assignment, sale, disposal, transfer, or delegation had occurred unless the District otherwise agrees in writing.

PPS 49-0210 Notice and Advertising Requirements; Posting

(1) Notice and Distribution Fee. The District shall furnish notice as set forth below in subsections (a) through(c) to a number of Persons sufficient for the purpose of fostering and promoting competition. The notice shall indicate where, when, how, and for how long the Solicitation Document may be obtained and generally describe the Public Improvement project or Work. The notice may contain any other appropriate information. The District may charge a fee or require a deposit for the Solicitation Document. The District may furnish notice using any method determined to foster and promote competition, including:

(a) Mailing notice of the availability of Solicitation Documents to Persons that have expressed an interest in the District's procurements;

(b) Placing notice on the District's electronic procurement System; or

(c) Placing notice on the District's Internet Web site.

(2) Advertising. Pursuant to ORS 279C.360 and this rule, the District shall advertise every solicitation for competitive Bids or competitive Proposals for a Public Improvement Contract, unless the Contract Review Board has exempted the Solicitation from the advertisement requirement as part of a competitive bidding exemption under ORS 279C.335.

(a) Unless the District publishes by Electronic Advertisement as permitted under subsection 2(b) of this rule, the District shall publish the advertisement for Offers at least once in at least one newspaper of general circulation in the area where the Contract is to be performed and in as many additional issues and publications as the District may determine to be necessary or desirable to foster and promote competition.

(b) The District may publish by Electronic Advertisement if the Contract Review Board determines that Electronic Advertisement is likely to be cost effective.

(c) In addition to the District's publication required under subsections 2(a) or 2 (b), the District shall also publish an advertisement for Offers in at least one trade newspaper of general statewide circulation if the Contract is for a Public Improvement with an estimated cost in excess of $125,000.

(d) All advertisements for Offers shall set forth:

(A) The Public Improvement project;

(B) The office where Contract terms, conditions, and specifications may be reviewed;

(C) The date that Persons shall file applications for prequalification under ORS 279C.340, if prequalification is a requirement, and the class or classes of work for which Persons shall be prequalified;

(D) The scheduled Closing, which shall not be less than five days after the date of the last publication of the advertisement;

(E) The name, title, and address of the District official authorized to receive Offers;

(F) The scheduled Opening; and

(G) If applicable, that the Contract is for a Public Work subject to ORS 279C.800 to ORS 279C.870 or the Davis-Bacon Act (40 U.S.C. 3141 to 3148).

PPS 49-0220 Prequalification of Offerors

(1) Prequalification. Pursuant to ORS 279C.430 and this rule, two types of prequalification are authorized:

(a) Mandatory Prequalification. The District may require mandatory prequalification of Offerors. The District shall indicate in the Solicitation Document if it will require mandatory

prequalification. Mandatory prequalification is when the District conditions a Person's submission of an Offer on the Person's prequalification. The District shall not consider an Offer from a Person that is not prequalified if the District required prequalification.

(b) Permissive Prequalification. The District may prequalify a Person for the District's solicitation list, but in permissive prequalification the District shall not limit distribution of a solicitation to that list.

(c) Prequalification Procedure. When prequalification is required or allowed, a Person shall submit a prequalification application to the District on the form prescribed by the District. The District shall determine if the applicant is qualified within 30 days of the date of application, or sooner if practicable and so requested by the applicant to enable the applicant to participate in Bidding on an advertised Contract. If the District finds that the applicant is qualified, the District shall provide notice to the applicant of the nature and type of Contracts the applicant is qualified to bid on and the period of time for which the qualification is valid.

(2) Prequalification Presumed. If an Offeror is currently prequalified by either the Oregon Department of Transportation or the Oregon Department of Administrative services to perform Contracts, the Offeror shall be rebuttably presumed qualified to perform similar Work for the District.

(3) Standards for Prequalification. A Person may prequalify by demonstrating to the District's satisfaction:

(a) The Person's financial, material, equipment, facility, and personnel resources and expertise, or ability to obtain such resources and expertise, indicate that the Person is capable of meeting all contractual responsibilities;

(b) The Person's record of performance;

(c) The Person's record of integrity;

(d) The Person is qualified to contract with the District. (See PPS 49-0390(2) regarding standards of responsibility.)

(4) Notice of Denial. If a Person fails to prequalify for a mandatory prequalification, the District shall notify the Person, specify the reasons under section (3) of this rule and inform the Person of the Person's right to a hearing under ORS 279C.445 and 279C.450 as provided in section (6) of this rule.

(5) Revocation of Prequalification. If the District has reasonable cause to believe that there has been a substantial change in the conditions of a prequalified Person and that the Person is no longer qualified or is less qualified, the District may revoke or revise and reissue the prequalification after reasonable notice to the prequalified Person. The notice shall specify the reasons under section (3) of this rule and inform the Person of the Person's right to a hearing under ORS 279C.445 and 279C.450 as provided in section (6) of this rule.

(6) Appeal of Denial or Revocation of, or Revision to Prequalification.

(a) Any Person who wishes to appeal the District decision under Sections (4) or (5) of this rule shall, within three business days after receipt of the notice of disqualification, file written notice with the District that Person appeals the decision. The District shall notify the Contract Review Board and schedule the appeal hearing before the Contract Review Board.

(b) Immediately upon receipt of the prospective bidder's or Proposer's notice of appeal, the District shall notify the local Contract Review Board.

(c) Upon the receipt of notice from the District under section (2) of this rule, the Contract Review Board shall promptly notify the Person appealing and the District of the time and place of the hearing. The Contract Review Board shall conduct the hearing and decide the appeal within

30 days after receiving the notice from the District. The Contract Review Board shall set forth in writing the reasons for the hearing decision.

(d) At the hearing the Contract Review Board shall consider de novo the notice of denial, revocation or revision of a prequalification, the standards listed in section (3) of this rule on which the District based the decision, and any evidence provided by the parties. Hearings before a Contract Review Board shall be conducted under rules of procedure adopted by the Contract Review Board.

(e) The Contract Review Board may allocate the Contract Review Board's costs for the hearing between the Person appealing and the District. The allocation shall be based on facts found by the Contract Review Board and stated in the final order that, in the Contract Review Board's opinion, warrant such allocation of costs. If the final order does not allocate the costs for the hearing, the costs shall be paid as follows:

(A) If the decision to deny, revoke, or revise a prequalification of a Person as a bidder is upheld, the cost shall be paid by the Person appealing the decision.

(B) If the decision to deny, revoke, or revise a prequalification of a Person as a bidder is reversed, the costs shall be paid by the District.

(f) Judicial review of any decision by the Contract Review Board shall be as set forth in ORS 279C.450.

PPS 49-0230 Eligibility to Bid or Propose; Registration or License

(1) Construction Contracts. The District shall not consider a Person's Offer to do Work as a Contractor, as defined in ORS 701.005(2), unless the Person has a current, valid certificate of registration issued by the Construction Contractors Board at the time the Offer is made.

(2) Landscape Contracts. The District shall not consider a Person's Offer to do Work as a landscape contractor as defined in ORS 671.520(2), unless the Person has a current, valid landscape contractor's license issued pursuant to ORS 671.560 by the State Landscape Contractors Board at the time the offer is made.

(3) Non-Complying Entities. The District shall deem an Offer received from a Person that fails to comply with this rule Non-Responsive and shall reject the Offer as stated in ORS 279C.365(1)(k), unless contrary to federal law or subject to different timing requirements set by federal funding or the District.

PPS 49-0240 Pre-Offer Conferences

(1) Purpose. The District may hold pre-Offer conferences with prospective Offerors prior to Closing to explain the procurement requirements, obtain information, or conduct site inspections.

(2) Required Attendance. The District may require attendance at the pre-Offer conference as a condition for making an Offer. Unless otherwise specified in the Solicitation Document, a mandatory attendance requirement is considered to have been met if, at any time during the mandatory meeting, a representative of the Offering firm is present.

(3) Scheduled Time. If the District holds a pre-Offer conference, it shall be held within a reasonable time after the Solicitation Document has been issued, but sufficiently before the Closing to allow Offerors to consider information provided at that conference.

(4) Statements Not Binding. Statements made by the District's representative at the pre-Offer conference do not change the Solicitation Document unless the District confirms such statements with a written Addendum to the Solicitation Document.

(5) District Announcement. The District shall set forth notice of any pre-Offer conference in the Solicitation Document in accordance with PPS 49-0200(1)(a)(B).

PPS 49-0250 Addenda to Solicitation Documents

(1) Issuance; Receipt. The District may change a Solicitation Document only by written Addenda. An Offeror shall provide written acknowledgement of receipt of all issued Addenda with its Offer, unless the District otherwise specifies in the Addenda or in the Solicitation Document.

(2) Notice and Distribution. The District shall notify prospective Offerors of Addenda consistent with the standards of notice set forth in PPS 49-0210(1). The Solicitation Document shall specify how the District shall provide notice of Addenda and how the District shall make the Addenda available (see PPS 49-0200(1)(a)(N). For example, "The District shall not mail notice of Addenda, but will publish notice of any Addenda on the District's Web site. Addenda may be downloaded off the District's Web site. Offerors should frequently check the District's Web site until Closing, i.e., at least once weekly until the week of Closing, and at least once daily during the week of the Closing."

(3) Timelines; Extensions. The District shall issue Addenda within a reasonable time to allow prospective Offerors to consider the Addenda in preparing their Offers. The District may extend the Closing if the District determines that prospective Offerors need additional time to review and respond to Addenda. Except to the extent required by public interest, the District shall not issue Addenda less than 72 hours before the Closing unless the Addendum also extends the Closing.

(4) Request for Change or Protest. Unless a different deadline is set forth in the Addendum, an Offeror may submit a written request for change or protest to the Addendum, as provided in PPS 49-0260, by the close of the District's next business day after issuance of the Addendum, or up to the last day allowed to submit a request for change or protest under PPS 49-0260, whichever date is later. The District shall consider only an Offeror's request for change or protest to the Addendum; the District shall not consider a request for change or protest to matters not added or modified by the Addendum, unless the Offeror submits the request for change or protest before the deadline for the District's receipt of request for change or protests as set forth in PPS 49-0260(2) and (3).

PPS 49-0260 Request for Clarification or Change; Solicitation Protests

(1) Clarification. Prior to the deadline for submitting a written request for change or protest, an Offeror may request that the District clarify any provision of the Solicitation Document. The District's clarification to an Offeror, whether orally or in writing, does not change the Solicitation Document and is not binding on the District unless the District amends the Solicitation Document by Addendum.

(2) Request for Change.

(a) Delivery. An Offeror may request in writing a change to the specifications or Contract terms and conditions. Unless otherwise specified in the Solicitation Document, an Offeror shall deliver the written request for change to the District not less than ten (10) days prior to Closing;

(b) Content of Request for Change.

(A) An Offeror's written request for change shall include a statement of the requested change(s) to the Contract terms and conditions, including any specifications, together with the reason for the requested change.

(B) An Offeror shall mark its request for change as follows:

(i) "Contract Provision Request for change"; and

(ii) Solicitation Document number (or other identification as specified in the Solicitation Document).

(3) Protest.

(a) Delivery. An Offeror may protest specifications or Contract terms and conditions. Unless otherwise specified in the Solicitation Document, an Offeror shall deliver a written protest on those matters to the District not less than ten (10) days prior to Closing.

(b) Content of Protest.

(A) An Offeror's written protest shall include:

(i) A detailed statement of the legal and factual grounds for the protest;

(ii) A description of the resulting prejudice to the Offeror; and

(iii) A statement of the desired changes to the Contract terms and conditions, including any specifications.

(B) An Offeror shall mark its protest as follows:

(i) "Contract Provision Protest"; and

(ii) Solicitation Document number (or other identification as specified in the Solicitation Document).

(4) The Response. The District is not required to consider an Offeror's request for change or protest after the deadline established for submitting such request or protest. The District shall provide notice to the applicable Person if it entirely rejects a protest. If the District agrees with the Person's request or protest, in whole or in part, the District shall either issue an Addendum reflecting its determination under PPS 49-0260 or cancel the Solicitation under PPS 49-0270.

(5) Extension of Closing. If the District receives a written request for change or protest from an Offeror in accordance with this rule, the District may extend Closing if the District determines an extension is necessary to consider the request or protest and issue an Addendum, if any, to the Solicitation Document.

(6) Failure to Protest or Request a Change Precludes Protest of Award on Such Issue. An Offeror cannot protest an award based on any issue that could have, but was not, raised as a Request for Change or Protest of solicitation.

PPS 49-0270 Cancellation of Solicitation Document

(1) Cancellation in the Public Interest. The District may cancel a solicitation for Good Cause if the District finds that cancellation is in the public interest. The District's reasons for cancellation shall be made part of the Solicitation file.

(2) Notice of Cancellation. If the District cancels a solicitation prior to Opening, the District shall provide notice of cancellation in accordance with PPS 49-0210(1). Such notice of cancellation shall:

(a) Identify the Solicitation;

(b) Briefly explain the reason for cancellation; and

(c) If appropriate, explain that an opportunity will be given to compete on any resolicitation.

(3) Disposition of Offers.

(a) Prior to Offer Opening. If the District cancels a solicitation prior to Offer Opening, the District shall return all Offers it received to Offerors unopened, provided the Offeror submitted its Offer in a hard copy format with a clearly visible return address. If there is no return address on the envelope, the District shall open the Offer to determine the source and then return it to the Offeror.

(b) After Offer Opening. If the District rejects all Offers, the District shall retain all such Offers as part of the District's Solicitation file.

PPS 49-0280 Offer Submissions

(1) Offer and Acceptance. The bid or proposal is the bidder's or Proposer's Offer to enter into a Contract.

(a) In competitive bidding and competitive Proposals, the Offer is always a "Firm Offer," i.e., the Offer shall be held open by the Offeror for the District's acceptance for the period specified in PPS 49-0410. The District may elect to accept the Offer at any time during the specified period, and the District's award of the Contract to a bidder constitutes acceptance of the Offer and binds the Offeror to the Contract.

(b) Notwithstanding the fact that a competitive proposal is a Firm Offer for the period specified in PPS 49-0410, the District may elect to discuss or negotiate certain Contractual provisions, as identified in these rules or in the Solicitation Document, with the Proposer. See PPS 49-0650 on Requests for Proposals and PPS 49-0290 on bid or proposal Security. Where negotiation is permitted by the rules or the Solicitation Document, Proposers are bound to an obligation to negotiate in good faith and only on those terms that the rules or the Solicitation Document has reserved for negotiation. In competitive Proposals, the Solicitation Document shall describe whether Offers are to be made and considered as "Firm Offers" that may be accepted without negotiation, as in the case of competitive Bidding, or whether Offers are subject to discussion, negotiation, or otherwise are not to be considered as final Offers. See PPS 49-0650 on Requests for Proposals and PPS 49-0290 on bid or proposal Security.

(2) Responsive Offer. The District may award a Contract only to a Responsible Offeror with a Responsive Offer.

(3) Contingent Offers. Except to the extent that an Offeror is authorized to propose certain terms and conditions pursuant to PPS 49-0650, an Offeror shall not make an Offer contingent upon the District's acceptance of any terms or conditions (including specifications) other than those contained in the Solicitation Document.

(4) Offeror's Acknowledgement. By signing and returning the Offer, the Offeror acknowledges that it has read and understands the terms and conditions contained in the Solicitation Document and that it accepts and agrees to be bound by the terms and conditions of the Solicitation Document. If the Request for proposal permits proposal of alternative terms under PPS 49-0650, the Offeror's Offer includes the nonnegotiable terms and conditions and any proposed terms and conditions offered for negotiation upon and to the extent accepted by the District in writing.

(5) Instructions. An Offeror shall submit and sign the Offer in accordance with the Solicitation Document. An Offeror shall initial and submit any corrections or erasures to their Offer prior to the Opening in accordance with the requirements for submitting an Offer under the Solicitation Document.

(6) Forms. An Offeror shall submit the Offers on the form(s) provided in the Solicitation Document, unless Offerors are otherwise instructed in the Solicitation Document.

(7) Documents. An Offeror shall provide the District with all documents and Descriptive Literature required under the Solicitation Document.

(8) Facsimile or Electronic Submissions. If the District permits facsimile or electronic Offers in the Solicitation Document, the Offeror may submit facsimile or Electronic Offers in accordance with the Solicitation Document. The District shall not consider facsimile or Electronic Offers unless authorized by the Solicitation Document.

(9) Product Samples and Descriptive Literature. The District may require Product Samples or Descriptive Literature if it is necessary or desirable to evaluate the quality, features, or characteristics of the

offered items. The District shall dispose of Product Samples or return or make available for return Product Samples to the Offeror in accordance with the Solicitation Document.

(10) Identification of Offers.

(a) To ensure proper identification and handling, Offers shall be submitted in a sealed envelope appropriately marked or in the envelope provided by the District, whichever is applicable.

(b) The District is not responsible for Offers submitted in any manner or format, or to any delivery point, other than as required in the Solicitation Document.

(11) Receipt of Offers. The Offeror is responsible for ensuring that the District receives the Offers at the required delivery point prior to the Closing, regardless of the method used to submit or transmit the Offer.

PPS 49-0290 Bid or Proposal Security

(1) Security Amount. If the District requires bid or proposal security, it shall be not more than 10 percent or less than 5 percent of the Offeror's bid or proposal, consisting of the base bid or proposal together with all additive alternates. The District shall not use bid or proposal security to discourage competition. The District shall clearly state any bid or proposal security requirements in its Solicitation Document. The Offeror shall forfeit bid or proposal security after award if the Offeror fails to execute the Contract and promptly return it with any required performance bond and payment bond and, in the case of proposal security, with any required proof of insurance. See ORS 279C.365(5) and 279C.385.

(2) Requirement for Bid Security (Optional for Proposals). Unless the District has otherwise exempted a solicitation or class of solicitations from bid security pursuant to ORS 279C.390, the District shall require bid security for its solicitation of Bids for Public Improvements. This requirement applies only to Public Improvement Contracts with a value, estimated by the Contracting Agency, of more than $100,000 or, in the case of Contracts for highways, bridges and other transportation projects, more than $50,000. See ORS 279C.365(6). The District may require bid security even if it has exempted a class of solicitations from bid security. The District may require proposal security in RFPs. See ORS 279C.400(5).

(3) Form of Bid or Proposal Security. The District may accept only the following forms of bid or proposal security:

(a) A surety bond from a surety company authorized to do business in the State of Oregon;

(b) An irrevocable letter of credit issued by an insured institution as defined in ORS 706.008; or

(c) A cashier's check or Offeror's certified check.

(4) Return of Security. The District shall return or release the bid or proposal security of all unsuccessful Offerors after a Contract has been fully executed and all required bonds and insurance have been provided, or after all Offers have been rejected. The District may return the bid or proposal security of unsuccessful Offerors prior to award if the return does not prejudice Contract award and the security of at least the bidders with the three lowest Bids, or the Proposers with the three highest scoring Proposals, is retained pending execution of a Contract.

PPS 49-0300 Facsimile Bids and Proposals

(1) District Authorization. The District may authorize Offerors to submit facsimile Offers. If the District determines that bid or proposal security is or will be required, the District shall not authorize facsimile Offers unless the District has established a method for receipt of such security. Prior to authorizing the submission of facsimile Offers, the District shall determine that the District's equipment and personnel are capable of receiving the size and volume of anticipated Offers within a short period of time. In addition, the District shall establish administrative procedures and controls:

(a) To receive, identify, record, and safeguard facsimile Offers;

(b) To ensure timely delivery of Offers to the location of Opening; and

(c) To preserve the Offers as sealed.

(2) Provisions to Be Included in Solicitation Document. In addition to all other requirements, if the District authorizes a facsimile Offer for Bids or Proposals, the District shall include in the Solicitation Document (other than in a Request for Quotes) the following:

(a) A provision substantially in the form of the following: "A 'facsimile Offer' as used in this Solicitation Document means an Offer, modification of an Offer, or withdrawal of an Offer that is transmitted to and received by the District via a facsimile machine";

(b) A provision substantially in the form of the following: "Offerors may submit facsimile Offers in response to this Solicitation Document. The entire response shall arrive at the place and by the time specified in this Solicitation Document";

(c) A provision that requires Offerors to sign their facsimile Offers;

(d) A provision substantially in the form of the following: "The District reserves the right to award the Contract solely on the basis of the facsimile Offer." However, upon the District's request, the apparent successful Offeror shall promptly submit its complete original signed Offer; and

(e) The data and compatibility characteristics of the District's receiving facsimile machine as follows:

(A) Telephone number; and

(B) Compatibility characteristics, e.g., make and model number, receiving speed, communications protocol; and

(f) A provision that the District is not responsible for any failure attributable to the transmission or receipt of the facsimile Offer including, but not limited to, the following:

(A) Receipt of garbled or incomplete documents;

(B) Availability or condition of the receiving facsimile machine;

(C) Incompatibility between the sending and receiving facsimile machine;

(D) Delay in transmission or receipt of documents;

(E) Failure of the Offeror to properly identify the Offer documents;

(F) Illegibility of Offer documents; and

(G) Security and confidentiality of data.

PPS 49-0310 Electronic Procurement

(1) General. The District may utilize Electronic Advertisement of Public Improvement Contracts in accordance with ORS 279C.360(1), provided that advertisement of such Contracts with an estimated Contract Price in excess of $125,000 shall also be published in a trade newspaper of general statewide circulation, and may post notices of intent to award electronically as provided by ORS 279C.410(7).

(2) Alternative Procedures. In the event that the District desires to direct or permit the submission and receipt of Offers for a Public Improvement Contract by electronic means, the District shall comply with PPS 47-0330 (electronic procurement under ORS 279B), taking into account ORS 279C requirements for written Bids, opening Bids publicly, bid security, first-tier subcontractor disclosure, and inclusion of prevailing wage rates.

(3) Interpretation. Nothing in this rule shall be construed as prohibiting the District from making procurement documents for Public Improvement Contracts available in electronic format as well as in hard copy when Bids are to be submitted only in hard copy. See ORS 279C.365(2).

PPS 49-0320 Pre-Closing Modification or Withdrawal of Offers

(1) Modifications. An Offeror may modify its Offer in writing prior to the Closing. An Offeror shall prepare and submit any modification to its Offer to the District in accordance with PPS 49-0280, unless otherwise specified in the Solicitation Document. Any modification shall include the Offeror's statement that the modification amends and supersedes the prior Offer. The Offeror shall mark the submitted modification as follows:

(a) Bid (or proposal) Modification; and

(b) Solicitation Number (or other identification as specified in the Solicitation Document).

(2) Withdrawals.

(a) An Offeror may withdraw its Offer by written notice submitted on the Offeror's letterhead, signed by an authorized representative of the Offeror, delivered to the location specified in the Solicitation Document (or the place of Closing if no location is specified), and received by the District prior to the Closing. The Offeror or authorized representative of the Offeror may also withdraw its Offer in person prior to the Closing, upon presentation of appropriate identification and satisfactory evidence of authority;

(b) The District may release an unopened Offer withdrawn under section (2)(a) of this rule to the Offeror or its authorized representative after voiding any date and time stamp mark;

(c) The Offeror shall mark the written request to withdraw an Offer as follows:

(A) Bid (or proposal) Withdrawal; and

(B) Solicitation number (or other identification as specified in the Solicitation Document).

(3) Documentation. The District shall include all documents relating to the modification or withdrawal of Offers in the appropriate Solicitation file.

PPS 49-0330 Receipt, Opening, and Recording of Offers; Confidentiality of Offers

(1) Receipt. The District shall electronically or mechanically time-stamp or hand-mark each Offer and any modification upon receipt. The District shall not open the Offer or modification upon receipt, but shall maintain it as confidential and secure until Opening. If the District inadvertently opens an Offer or a modification prior to the Opening, the District shall return the Offer or modification to its secure and confidential state until Opening. The District shall document the resealing for the Solicitation file (e.g., "The District inadvertently opened the Offer due to improper identification of the Offer").

(2) Opening and Recording. The District shall publicly open Offers, including any modifications made to the Offer, pursuant to PPS 49-0320. In the case of Invitations to Bid, to the extent practicable, the District shall read aloud the name of each bidder, the bid price(s), and such other information as the District considers appropriate. In the case of Requests for Proposals or voluminous Bids, if the Solicitation Document so provides, the District shall not read Offers aloud.

(3) Availability. After Opening, the District shall make Bids available for public inspection, but pursuant to ORS 279C.410, Proposals are not required to be available for public inspection until after the notice of intent to award is issued. In any event, the District may withhold from disclosure those portions of an Offer that the Offeror designates as trade secrets or as confidential proprietary data in accordance with applicable law. See ORS 192.501(2); ORS 646.461 through 646.475. To the extent that the District determines such designation is not in accordance with applicable law, the District shall make those portions available for

public inspection. The Offeror shall separate information designated as confidential from other non-confidential information at the time of submitting its Offer. Prices, makes, models, or catalog numbers of items offered, scheduled delivery dates, and terms of payment are not confidential, and shall be publicly available regardless of an Offeror's designation to the contrary.

PPS 49-0340 Late Bids, Late Withdrawals, and Late Modifications

Any Offer received after Closing is late. An Offeror's request for withdrawal or modification of an Offer received after Closing is late. The District shall not consider late Offers, withdrawals, or modifications except as permitted in PPS 49-0350 or 49-0390.

PPS 49-0350 Mistakes

(1) Generally. To protect the integrity of the competitive procurement process and to assure fair treatment of Offerors, the District should carefully consider whether to permit waiver, correction, or withdrawal of Offers for certain mistakes.

(2) District Treatment of Mistakes. The District shall not allow an Offeror to correct or withdraw an Offer for an error in judgment. If the District discovers certain mistakes in an Offer after Opening but before award of the Contract, the District may take the following action:

(a) The District may waive, or permit an Offeror to correct, a minor informality. A minor informality is a matter of form rather than substance that is evident on the face of the Offer, or an insignificant mistake that can be waived or corrected without prejudice to other Offerors. Examples of minor informalities include an Offeror's failure to:

(A) Return the correct number of signed Offers or the correct number of other documents required by the Solicitation Document;

(B) Sign the Offer in the designated block, provided a signature appears elsewhere in the Offer, evidencing an intent to be bound; and

(C) Acknowledge receipt of an Addendum to the Solicitation Document, provided that it is clear on the face of the Offer that the Offeror received the Addendum and intended to be bound by its terms, or the Addendum involved did not affect price, quality, or delivery.

(b) The District may correct a clerical error if the error is evident on the face of the Offer or other documents submitted with the Offer, and the Offeror confirms the District's correction in writing. A clerical error is an Offeror's error in transcribing its Offer. Unit prices shall prevail over extended prices in the event of a discrepancy between extended prices and unit prices.

(c) The District may permit an Offeror to withdraw an Offer based on one or more clerical errors in the Offer only if the Offeror shows with objective proof and by clear and convincing evidence:

(A) The nature of the error;

(B) That the error is not a minor informality under this section or an error in judgment;

(C) That the error cannot be corrected or waived under subsection (b) of this rule;

(D) That the Offeror acted in good faith in submitting an Offer that contained the claimed error and in claiming that the alleged error in the Offer exists;

(E) That the Offeror acted without gross negligence in submitting an Offer that contained a claimed error;

(F) That the Offeror will suffer substantial detriment if the District does not grant the Offeror permission to withdraw the Offer;

(G) That the District's or the public's status has not changed so significantly that relief from the forfeiture will work a substantial hardship on the District or the public it represents; and

(H) That the Offeror promptly gave notice of the claimed error to the District.

(d) The criteria in section (2)(c) of this rule shall determine whether the District shall permit an Offeror to withdraw its Offer after Closing. These criteria also shall apply to the question of whether the District shall permit an Offeror to withdraw its Offer without forfeiture of its bid bond (or other bid or proposal security), or without liability to the District based on the difference between the amount of the Offeror's Offer and the amount of the Contract actually awarded by the District, whether by award to the next lowest Responsive and Responsible bidder or the best Responsive and Responsible Proposer, or by resort to a new solicitation.

(3) Rejection for Mistakes. The District shall reject any Offer in which a mistake is evident on the face of the Offer and the intended correct Offer is not evident or cannot be substantiated from documents submitted with the Offer.

(4) Identification of Mistakes After Award. The procedures and criteria set forth above are Offeror's only opportunity to correct mistakes or withdraw Offers because of a mistake. Following award, an Offeror is bound by its Offer, and may withdraw its Offer or rescind a Contract entered into pursuant to this division 49 only to the extent permitted by applicable law.

PPS 49-0360 First-Tier Subcontractors; Disclosure and Substitution; ITB

(1) Required Disclosure. Within two working hours after the bid Closing on an ITB for a Public Improvement having a Contract Price anticipated by the District to exceed $100,000, all bidders shall submit to the District a disclosure form as described by ORS 279C.370(2), identifying any first-tier subcontractors (those entities that would be contracting directly with the prime Contractor) that will be furnishing labor or labor and materials on the Contract, if awarded, whose subcontract value would be equal to or greater than:

(a) 5 percent of the total Contract Price, but at least $15,000; or

(b) $350,000, regardless of the percentage of the total Contract Price.

(2) Bid Closing, Disclosure Deadline, and Bid Opening. For each ITB to which this rule applies, the District shall:

(a) Set the bid Closing on a Tuesday, Wednesday, or Thursday, and at a time between 2:00 p.m. and 5:00 p.m., except that these bid Closing restrictions do not apply to an ITB for maintenance or construction of highways, bridges, or other transportation facilities, and provided that the two-hour disclosure deadline described by this rule would not then fall on a legal holiday;

(b) Open Bids publicly immediately after the bid Closing; and

(c) Consider for Contract award only those Bids for which the required disclosure has been submitted by the announced deadline on forms prescribed by the District.

(3) Bidder Instructions and Disclosure Form. For the purposes of this rule, the District in its solicitation shall:

(a) Prescribe the disclosure form that shall be utilized, substantially in the form set forth in ORS 279C.370(2); and

(b) Provide instructions in a notice substantially similar to the following:

"Instructions for First-Tier Subcontractor Disclosure:

Bidders are required to disclose information about certain first-tier subcontractors (see ORS 279C.370). Specifically, when the Contract amount of a first-tier subcontractor

furnishing labor or labor and materials would be greater than or equal to: (i) 5 percent of the project bid, but at least $15,000, or (ii) $350,000 regardless of the percentage, the bidder shall disclose the following information about that subcontract either in its bid submission, or within two hours after bid Closing:

(A) The subcontractor's name,

(B) The category of work that the subcontractor would be performing, and

(C) The dollar value of the subcontract.

If the bidder will not be using any subcontractors that are subject to the above disclosure requirements, the bidder is required to indicate "NONE" on the accompanying form.

THE DISTRICT SHALL REJECT A BID IF THE BIDDER FAILS TO SUBMIT THE DISCLOSURE FORM WITH THIS INFORMATION BY THE STATED DEADLINE (see PPS 49-0360)."

(4) Submission. A bidder shall submit the disclosure form required by this rule either in its bid submission or within two working hours after bid Closing in the manner specified by the ITB.

(5) Responsiveness. Compliance with the disclosure and submittal requirements of ORS 279C.370 and this rule is a matter of Responsiveness. Bids that are submitted by bid Closing, but for which the disclosure submittal has not been made by the specified deadline, are not Responsive and will not be considered for Contract award.

(6) District Role. The District shall obtain, and make available for public inspection, the disclosure forms required by ORS 279C.370 and this rule. The District shall also provide copies of disclosure forms to BOLI as required by ORS 279C.835. The District is not required to determine the accuracy or completeness of the information provided on disclosure forms.

(7) Substitution. Pursuant to ORS 279C.585, a Contractor whose bid is accepted may substitute a first-tier subcontractor that was not disclosed under ORS 279C.370 and this rule by submitting the name of the new subcontractor and the reason for the substitution in writing to the District. A Contractor may substitute a first-tier subcontractor under this section in the following circumstances:

(a) When the subcontractor disclosed under ORS 279C.370 fails or refuses to execute a written Contract after having had a reasonable opportunity to do so after the written Contract, which shall be reasonably based on the general terms, conditions, plans, and specifications for the Public Improvement project or the terms of the subcontractor's written bid, is presented to the subcontractor by the Contractor.

(b) When the disclosed subcontractor becomes bankrupt or insolvent.

(c) When the disclosed subcontractor fails or refuses to perform the subcontract.

(d) When the disclosed subcontractor fails or refuses to meet the bond requirements of the Contractor that had been identified prior to the bid submittal.

(e) When the Contractor demonstrates to the District that the subcontractor was disclosed as the result of an inadvertent clerical error.

(f) When the disclosed subcontractor does not hold a license from, or has a license that is not properly endorsed by, the Construction Contractors Board and is required to be licensed by the Construction Contractors Board.

(g) When the Contractor determines that the work performed by the disclosed subcontractor is substantially unsatisfactory and not in substantial accordance with the plans and specifications or that the subcontractor is substantially delaying or disrupting the progress of the work.

(h) When the disclosed subcontractor is ineligible to work on a Public Improvement Contract under applicable statutory provisions.

(i) When the substitution is for Good Cause. The Construction Contractors Board shall define "Good Cause" by rule. "Good cause" includes, but is not limited to, the financial instability of a subcontractor. The definition of "Good Cause" shall reflect the least-cost policy for Public Improvement Contracts established in ORS 279C.305.

(j) When the substitution is reasonably based on the Contract alternates chosen by the District.

The District shall accept written submissions filed under this section (7) as public records. Aside from issues involving inadvertent clerical error under ORS 279C.585, the District does not have a statutory role or duty to review, approve, or resolve disputes concerning such substitutions. See ORS 279C.590 regarding complaints to the Construction Contractors Board on improper substitution.

PPS 49-0370 Disqualification of Persons

(1) Authority. The District may disqualify a Person from consideration of award of the District's Contracts after providing the Person with notice and a reasonable opportunity to be heard in accordance with sections (2) and (4) of this rule.

(a) Standards for Conduct Disqualification. As provided in ORS 279C.440, the District may disqualify a Person for:

(A) Conviction for the commission of a criminal offense as an incident in obtaining or attempting to obtain a public or private contract or subcontract or in the performance of such Contract or subcontract.

(B) Conviction under state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty that currently, seriously, and directly affects the Person's responsibility as a contractor.

(C) Conviction under state or federal antitrust statutes.

(D) Violation of a Contract provision that is regarded by the District to be so serious as to justify disqualification. A violation under this section (1)(a)(D) may include, but is not limited to, material failure to perform the terms of a Contract or an unsatisfactory performance in accordance with the terms of the Contract. However, a Person's failure to perform or unsatisfactory performance caused by acts beyond the Person's control is not a basis for disqualification.

(E) Failure to carry workers' compensation or unemployment insurance as required by statute.

(b) Standards for Disqualification. As provided in ORS 200.065, 200.075, or 279A.110, the District may disqualify a Person's right to submit an Offer or to participate in a Contract (e.g., subcontractors) as follows:

(A) For a Disqualification under ORS 200.065, the District may disqualify a Person upon finding that:

(i) The Person fraudulently obtained or retained or attempted to obtain or retain or aided another Person to fraudulently obtain or retain or attempt to obtain or retain

certification as a disadvantaged business enterprise, minority-owned business, women owned business, emerging small business enterprise, or a veteran-owned business; or

(ii) The Person knowingly made a false claim that any Person is qualified for certification or is certified under ORS 200.055 for the purpose of gaining a Contract or subcontract or other benefit; or

(iii) The Person has been disqualified by another district under ORS 200.065.

(B) For a Disqualification under ORS 200.075, the District may disqualify a Person upon finding that:

(i) The Person has entered into an agreement representing that a disadvantaged business enterprise, minority-owned business, women-owned business, emerging small business enterprise, or a veteran-owned business, certified under ORS 200.055 ("Certified Enterprise"), will perform or supply materials under a Public Improvement Contract without the knowledge and consent of the Certified Enterprise; or

(ii) The Person exercises management and decision-making control over the internal operations, as defined by ORS 200.075(1)(b), of any Certified Enterprise; or

(iii) The Person uses a Certified Enterprise to perform services under a Contract or to provide supplies under a Public Improvement Contract to meet an established Certified Enterprise goal, and such enterprise does not perform a commercially useful function, as defined by ORS 200.075(3), in performing its obligations under the Contract.

(iv) If a Person is Disqualified for a Disqualification under ORS 200.075, the affected District shall not permit that Person to participate in that District's Contracts.

(C) For a Disqualification under ORS 279A.110, the District may disqualify a Person if the District finds that the Person discriminated against a disadvantaged business enterprise, minority-owned business, women-owned business, emerging small business enterprise, or a veteran-owned business, Contract with that District.

(2) Notice of Intent to Disqualify. The District shall notify the Person in writing of a proposed Disqualification personally or by registered or certified mail, return receipt requested. This notice shall:

(a) State that the District intends to disqualify the Person;

(b) Set forth the reasons for the Disqualification;

(c) Include a statement of the Person's right to a hearing if requested in writing within a time period established by the District and that if the District does not receive the Person's written request for a hearing within the time stated, the Person shall have waived its right to a hearing;

(d) Include a statement of the authority under which the hearing will be held;

(e) Include a reference to the particular sections of the statutes and rules involved;

(f) State the proposed disqualification period; and

(g) State that the Person may be represented by legal counsel.

(3) Hearing. The Superintendent will schedule a hearing upon the District's receipt of a timely hearing request. Within a reasonable time prior to the hearing, the Superintendent will notify the Person of the time and place of the hearing and provide information on hearing procedures, right to representation and other matters relating to the conduct of the hearing. Following the hearing, the Superintendent will make a decision on whether to disqualify the Person.

(4) Notice of Disqualification. The District shall notify the Person in writing of its Disqualification, personally or by registered or certified mail, return receipt requested. The notice shall contain:

(a) The effective date and period of Disqualification;

(b) The grounds for Disqualification; and

(c) A statement of the Person's appeal rights and applicable appeal deadlines as provided in section (5) of this rule.

(5) Appeal of Disqualification.

(a) Any Person who wishes to appeal a decision by the Superintendent to disqualify the Person under this section shall, within three business days after receipt of the notice of intent to Disqualify under section (4) of this rule, file written notice with the District that the Person appeals the decision. The District shall notify the Contract Review Board and schedule the appeal hearing before the Contract Review Board.

(b) Immediately upon receipt of the prospective bidder's or Proposer's notice of appeal, the District shall notify the appropriate Local Contract Review Board.

(c) Upon the receipt of notice from the District under section (2) of this rule, the Contract Review Board shall promptly notify the Person appealing and the District of the time and place of the hearing. The Contract Review Board shall conduct the hearing and decide the appeal within 30 days after receiving the notice from the District. The Contract Review Board shall set forth in writing the reasons for the hearing decision.

(d) At the hearing the Contract Review Board shall consider de novo the notice of disqualification, the reasons for disqualification set forth in section (1) of this rule on which the District based the disqualification, and any evidence provided by the parties. Hearings before a Contract Review Board shall be conducted under rules of procedure adopted by the Contract Review Board.

(e) The Contract Review Board may allocate the Contract Review Board's costs for the hearing between the Person appealing and the District. The allocation shall be based on facts found by the Contract Review Board and stated in the final order that, in the Contract Review Board's opinion, warrant such allocation of costs. If the final order does not allocate the costs for the hearing, the costs shall be paid as follows:

(A) If the decision to disqualify the Person is upheld, the costs shall be paid by the Person appealing the decision.

(B) If the decision to disqualify a Person is reversed, the costs shall be paid by the District.

(f) Judicial review of any decision by the Contract Review Board shall be as set forth in ORS 279C.450.

PPS 49-0380 Bid or Proposal Evaluation Criteria

(1) General. A Public Improvement Contract, if awarded, shall be awarded to the Responsible bidder submitting the lowest Responsive Bid, or to the Responsible Proposer submitting the best Responsive proposal. See PPS 49-0390 and rules for Alternative Contracting Methods at PPS 49-0600 to 49-0690.

(2) Bid Evaluation Criteria. Invitations to Bid may solicit lump-sum Offers, unit-price Offers, or a combination of the two.

(a) Lump Sum. If the ITB requires a lump-sum bid without additive or deductive alternates, or if the District elects not to award additive or deductive alternates, Bids shall be compared on the basis of lump-sum prices, or lump-sum base-bid prices, as applicable. If the ITB calls for a lump-sum base bid, plus additive or deductive alternates, the total bid price shall be calculated by adding to

or deducting from the base bid those alternates selected by the District for the purpose of comparing Bids.

(b) Unit Price. If the bid includes unit pricing for estimated quantities, the total bid price shall be calculated by multiplying the estimated quantities by the unit prices submitted by the bidder, and adjusting for any additive or deductive alternates selected by the District for the purpose of comparing Bids. The District shall specify within the Solicitation Document the estimated quantity of the procurement to be used for determination of the low bidder. In the event of mathematical discrepancies between unit price and any extended price calculations submitted by the bidder, the unit price governs. See PPS 49-0350(2)(b).

(3) Proposal Evaluation Criteria. If the District has exempted the procurement of a Public Improvement from the competitive Bidding requirements of ORS 279C.335(1) and has directed the District to use an Alternative Contracting Method under ORS 279C.335(4), the District shall set forth the evaluation criteria in the Solicitation Documents. See PPS 49-0640, 49-0650, 49-0670, 049-0690, ORS 279C.335 and 279C.405.

PPS 49-0390 Offer Evaluation and Award; Determination of Responsibility

(1) General. If awarded, the District shall award the Contract to the Responsible bidder submitting the lowest Responsive Bid or the Responsible Proposer or Proposers submitting the best, Responsive proposal or Proposals, provided that such Person is not listed by the Construction Contractors Board as disqualified to hold a Public Improvement Contract (See ORS 279C.375(3)(a)) or is ineligible for award as a nonresident education service district (ORS 279C.325). The District may award by item, groups of items, or the entire Offer provided such award is consistent with the Solicitation Document and in the public interest. Where award is based on competitive Bids, ORS 279C.375(5) permits multiple Contract awards when specified in the ITB.

(2) Determination of Responsibility. Offerors are required to demonstrate their ability to perform satisfactorily under a Contract. Before awarding a Contract, the District shall have information that indicates that the Offeror meets the standards of responsibility set forth in ORS 279C.375(3)(b). To be a Responsible Offeror, the District shall determine that the Offeror:

(a) Has available the appropriate financial, material, equipment, facility, and personnel resources and expertise, or has the ability to obtain the resources and expertise, necessary to meet all Contractual responsibilities;

(b) Holds current licenses that businesses or service professionals operating in this state shall hold in order to undertake or perform the work specified in the Contract;

(c) Is covered by liability insurance and other insurance in amounts the District requires in the Solicitation Documents;

(d) Qualifies as a carrier-insured employer or a self-insured employer under ORS 656.407, or has elected coverage under ORS 656.128;

(e) Has made the disclosure required under ORS 279C.370.

(f) Has completed previous contracts of a similar nature with a satisfactory record of performance. For purposes of this subparagraph, a satisfactory record of performance means that to the extent that the costs associated with and time available to perform a previous contract remained within the bidder's control, the bidder stayed within the time and budget allotted for the procurement, and otherwise performed the contract in a satisfactory manner. The District should carefully scrutinize an Offeror's record of contract performance if the Offeror is or recently has been materially deficient in contract performance. In reviewing the Offeror's performance, the Contracting Agency should determine whether the Offeror's deficient performance was expressly

excused under the terms of the contract, or whether the Offeror took appropriate corrective action. The District may review the Offeror's performance on both private and public contracts in determining the Offeror's record of contract performance. The District shall make its basis for determining an Offeror not Responsible under this paragraph part of the Solicitation file;

(g) Has a satisfactory record of integrity. An Offeror may lack integrity if the District determines the Offeror demonstrates a lack of business ethics such as violation of state environmental laws or false certifications made to a Contracting Agency. A Contracting Agency may find an Offeror not Responsible based on the lack of integrity of any Person having influence or control over the Offeror (such as a key employee of the Offeror that has the authority to significantly influence the Offeror's performance of the Contract or a parent company, predecessor or successor Person). The standards for Conduct Disqualification under PPS 49-0370 may be used to determine an Offeror's integrity. The District may find an Offeror non-responsible based on previous conviction id offenses related to obtaining or attempting to obtain a contract or subcontract or in connection with the Offeror's performance of a contract or subcontract. The District shall make its basis for determining that an Offeror is not responsible under this paragraph in the Solicitation file;

(h) Is legally qualified to contract with the District; and

(a) Has supplied all necessary information in connection with the inquiry concerning responsibility. If an Offeror fails to promptly supply information requested by the District concerning responsibility, the District shall determine the Offeror's responsibility based on any available information, or may find that the Offeror is not responsible.

(3) Documenting Agency Determinations. The District shall document its compliance with ORS 279C.375(3) and the above sections of this rule on a Responsibility Determination Form substantially as set forth in 279.375(3)(c), and file that form with the Construction Contractors Board within 30 days after Contract award.

(4) District Evaluation. The District shall evaluate an Offer only as set forth in the Solicitation Document and in accordance with applicable law. The District shall not evaluate an Offer using any other requirement or criterion.

(5) Offeror Submissions.

(a) The District may require an Offeror to submit Product Samples, Descriptive Literature, technical data, or other material, and may also require any of the following prior to award:

(A) Demonstration, inspection, or testing of a product for characteristics such as compatibility, quality, or workmanship;

(B) Examination of such elements as appearance or finish; or

(C) Other examinations to determine whether the product conforms to specifications.

(b) The District shall evaluate product acceptability only in accordance with the criteria disclosed in the Solicitation Document to determine that a product is acceptable. The District shall reject an Offer providing any product that does not meet the Solicitation Document requirements. The District's rejection of an Offer because it offers nonconforming Work or materials is not Disqualification and is not appealable under ORS 279C.445.

(6) Evaluation of Bids. The District shall use only objective criteria to evaluate Bids as set forth in the ITB. The District shall evaluate Bids to determine which Responsible Offeror Offers the lowest Responsive Bid.

(a) Nonresident bidders. In determining the lowest Responsive Bid, the District shall add a percentage increase to the Bid of a nonresident bidder equal to the percentage, if any, of the preference given to that bidder in the state in which the bidder resides.

(b) Clarifications. In evaluating Bids, the District may seek information from a bidder only to clarify the bidder's Bid. Such clarification shall not vary, contradict, or supplement the Bid. A bidder shall submit written and signed clarifications and such clarifications shall become part of the bidder's Bid.

(c) Negotiation Prohibited. The District shall not negotiate scope of work or other terms or conditions under an Invitation to Bid process prior to award.

(7) Evaluation of Proposals. See PPS 49-0650 regarding rules applicable to Requests for Proposals.

PPS 49-0395 Notice of Intent to Award

(1) Notice. At least seven days before the award of a Public Improvement Contract, the District shall issue to each bidder (pursuant to ORS 279C.375(2)) and each Proposer (pursuant to ORS 279C.410(7)), or post electronically or otherwise, a notice of the District's intent to award the Contract. This requirement does not apply to award of a Small or Intermediate (informal competitive quotes) Public Improvement Contract awarded under ORS 279C.335(1)(c) or (d).

(2) Form and Manner of Posting. The form and manner of posting notice shall conform to customary practices within the District's procurement system, and may be made electronically.

(3) Finalizing Award. The District's award shall not be final until the later of the following:

(a) Seven days after the date of the notice, unless the Solicitation Document provided a different period for protest; or

(b) The District provides a written response to all timely filed protests that denies each protest and affirms the award.

(4) Prior Notice Impractical. Posting of notice of intent to award shall not be required when the District determines that it is impractical due to unusual time constraints in making prompt award for its immediate procurement needs, documents the Solicitation file as to the reasons for that determination, and posts notice of that action as soon as reasonably practical.

PPS 49-0400 Documentation of Award; Availability of Award Decisions

(1) Basis of Award. After award, the District shall make a record showing the basis for determining the successful Offeror part of the District's Solicitation file.

(2) Contents of Award Record for Bids. The District's record shall include:

(a) All submitted Bids;

(b) Completed bid tabulation sheet; and

(c) Written justification for any rejection of lower Bids.

(3) Contents of Award Record for Proposals. Where the use of Requests for Proposals is authorized as set forth in PPS 49-0650, the District's record shall include:

(a) All submitted Proposals;

(b) The completed evaluation of the Proposals;

(c) Written justification for any rejection of higher-scoring Proposals or for failing to meet mandatory requirements of the Request for proposal; and

(d) If the District permitted negotiations in accordance with PPS 49-0650, the District's completed evaluation of the initial Proposals and the District's completed evaluation of final Proposals.

(4) Contract Document. The District shall deliver a fully executed copy of the final Contract to the successful Offeror.

(5) Bid Tabulations and Award Summaries. Upon request of any Person, the District shall provide tabulations of awarded Bids or evaluation summaries of Proposals for a nominal charge which may be payable in advance. Requests shall contain the Solicitation Document number and, if requested, be accompanied by a self-addressed, stamped envelope. The District may also provide tabulations of Bids and Proposals awarded on designated Web site or the District's Electronic Procurement System.

(6) Availability of Solicitation Files. The District shall make completed Solicitation files available for public review at the District.

(7) Copies from Solicitation Files. Any Person may obtain copies of material from Solicitation files upon payment of a reasonable copying charge.

PPS 49-0410 Time for District Acceptance; Extension

(1) Time for Offer Acceptance. An Offeror's bid, or proposal submitted as a Firm Offer (see PPS 49-0280), is irrevocable, valid, and binding on the Offeror for not less than 60 days from Closing unless otherwise specified in the Solicitation Document.

(2) Extension of Acceptance Time. The District may request, orally or in writing, that Offerors extend, in writing, the time during which the District may consider and accept their Offer(s). If an Offeror agrees to such extension, the Offer shall continue as a Firm Offer, irrevocable, valid, and binding on the Offeror for the agreed-upon extension period.

PPS 49-0420 Negotiation With Bidders Prohibited

(1) Bids. Except as permitted by ORS 279C.340 and PPS 49-0430 when all bids exceed the cost estimate, the District shall not negotiate with any bidder prior to Contract award. After award of the Contract, the District and the Contractor may only modify the resulting Contract by change order or amendment to the Contract in accordance with PPS 49-0910.

(2) Requests for Proposals. The District may only conduct discussions or negotiations with Proposers in accordance with the requirements of PPS 49-0650.

PPS 49-0430 Negotiation When Bids Exceed Cost Estimate

(1) Generally. In accordance with ORS 279C.340, if all Responsive Bids from Responsible bidders on a competitively bid project exceed the District's Cost Estimate, prior to Contract award the District may negotiate Value Engineering and Other Options with the Responsible bidder submitting the lowest Responsive bid in an attempt to bring the project within the District's Cost Estimate. The subcontractor disclosure and substitution requirements of PPS 49-0360 do not apply to negotiations under this rule.

(2) Definitions. The following definitions apply to this rule:

(a) "Cost Estimate" means the District's most recent pre-bid, good faith assessment of anticipated Contract costs, consisting either of an estimate of an architect, engineer, or other qualified professional, or confidential cost calculation work sheets, where available, and otherwise consisting of formal planning or budgetary documents.

(b) "Other Options" means those items generally considered appropriate for negotiation in the RFP process, relating to the details of Contract performance as specified in PPS 49-0650, but excluding any material requirements previously announced in the Solicitation process that would likely affect the field of competition.

(c) **"Project"** means a Public Improvement.

(d) **"Value Engineering"** means the identification of alternative methods, materials, or systems which provide for comparable function at reduced initial or life-time cost. It includes proposed changes to the plans, specifications, or other Contract requirements that may be made, consistent with industry practice, under the original Contract by mutual agreement in order to take advantage of potential cost savings without impairing the essential functions or characteristics of the Public Improvement. Cost savings include those resulting from life cycle Costing, which may either increase or decrease absolute costs over varying time periods.

(3) **Rejection of Bids**. In determining whether all Responsive Bids from Responsible bidders exceed the Cost Estimate, only those Bids that have been formally rejected, or Bids from bidders who have been formally disqualified by the District, shall be excluded from consideration.

(4) **Scope of Negotiations**. The District shall not proceed with Contract award if the scope of the project is significantly changed from the original bid. The scope is considered to have been significantly changed if the pool of competition would likely have been affected by the change; that is, if other bidders would have been expected by the District to participate in the Bidding process had the change been made during the Solicitation process rather than during negotiation. This rule shall not be construed to prohibit re-solicitation of trade subcontracts.

(5) **Discontinuing Negotiations**. The District may discontinue negotiations at any time, and shall do so if it appears to the District that the apparent low bidder is not negotiating in good faith or fails to share cost and pricing information upon request. Failure to rebid any portion of the project, or to obtain subcontractor pricing information upon request, shall be considered a lack of good faith.

(6) **Limitation**. Negotiations may be undertaken only with the lowest Responsive, Responsible bidder pursuant to ORS 279C.340. That statute does not provide any additional authority to further negotiate with bidders next in line for Contract award.

(7) **Public Records**. To the extent that a bidder's records used in Contract negotiations under ORS 279C.340 are public records, they are exempt from disclosure until after the negotiated Contract has been awarded or the negotiation process has been terminated, at which time they are subject to disclosure pursuant to the provisions of the Oregon Public Records Law, ORS 192.311 through 192.478.

PPS 49-0440 Rejection of Offers

(1) **Rejection of an Offer.**

(a) The District may reject any Offer upon finding that to accept the Offer may impair the integrity of the procurement process or that rejecting the Offer is in the public interest.

(b) The District shall reject an Offer upon the District's finding that the Offer:

(A) Is contingent on the District's acceptance of terms and conditions (including specifications) that differ from the Solicitation Document,

(B) Takes exception to terms and conditions (including specifications),

(C) Attempts to prevent public disclosure of matters in contravention of the terms and conditions of the Solicitation Document or in contravention of applicable law;

(D) Offers Work that fails to meet the specifications of the Solicitation Documents;

(E) Is late; or

(F) Is not in substantial compliance with the Solicitation Document; or

(G) Is not in substantial compliance with all prescribed public solicitation procedures.

(c) The District shall reject an Offer upon the District's finding that the Offeror:

(A) Has not been prequalified under ORS 279C.430 and the District required mandatory prequalification;

(B) Has been Disqualified;

(C) Has been declared ineligible under ORS 279C.860 by the Commissioner of the Bureau of Labor and Industries and the Contract is for a Public Work;

(D) Is listed as not qualified by the Construction Contractors Board, if the Contract is for a Public Improvement;

(E) Has not met the requirements of ORS 279A.105 if required by the Solicitation Document;

(F) Has not submitted properly executed bid or proposal security as required by the Solicitation Document;

(G) Has failed to provide the certification required under section (3) of this rule; or

(H) Is not Responsible. See PPS 49-0390(2) regarding District determination that the Offeror has met statutory standards of responsibility.

(2) Form of Business. For purposes of this rule, the District may investigate any Person submitting an Offer. The investigation may include that Person's officers, directors, owners, affiliates, or any other Person acquiring ownership of the Person to determine application of this rule or to apply the Disqualification provisions of ORS 279C.440 to 279C.450 and PPS 49-0370.

(3) Certification of Non-Discrimination. The Offeror shall certify and deliver to the District written certification, as part of the Offer, that the Offeror has not discriminated and will not discriminate against any disadvantaged business enterprise, minority-owned business, women-owned business, emerging small business, or a veteran-owned business, in obtaining any required subcontracts. Failure to do so shall be grounds for disqualification.

(4) Contract and Subcontract Conditions. If the District awards a Contract to an Offeror that has been determined to be responsible under ORS 200.005(8)5 and 200.045(3),6 or awards a Contract under ORS 279A.100:7

(a) The District shall provide, as a material condition of the Contract:

(A) That the Contractor shall maintain its certification under ORS 200.055 throughout the term of the Contract and any extensions (if the Contracting Agency used the certification as a factor in or as a basis for the award of the Contract);

(B) That the Contractor shall promptly pay each subcontractor that is certified under ORS 200.055 in accordance with ORS 279B.220, or 279C.570 and ORS 279C.580, whichever apply to the Contract;

(C) That the Contractor shall include, in any subcontract the Contractor establishes in connection with the Contract, a provision that requires the subcontractor to maintain the subcontractor's

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[5] A bidder or proposer that the Governor's Policy Advisor for Economic and Business Equity determines has undertaken both a policy and a practice of actively pursuing participation by minority-owned businesses, women-owned businesses, businesses that veterans own or emerging small businesses in all of the bidder's or proposer's bids or proposals, both public and private.
[6] A bidder or proposer has made good faith efforts to encourage required participants to participate by taking all of the actions list in ORS 200.045(3).
[7] An affirmative action program adopted under ORS 279A.100 for goods and services contracts or any other contract under $50,000.

certification under ORS 200.055 throughout the term of the subcontract and any extensions (if the Contractor used the certification as a factor in or as a basis for the award of the subcontract);

(D) That the District may require the Contractor to terminate a subcontract with a subcontractor that fails to maintain its certification under ORS 200.055 throughout the term of the subcontract and any extensions.

(b) In the administration of Contracts that are subject to section (4) of this rule, the District shall verify the Contractor's and any subcontractor's compliance with Subsection (4)(a) of this rule.

(c) Subparagraph (4)(a)(A) of this section does not apply to an emerging small business that ceases to qualify as a tier one firm or a tier two firm (as ORS 200.005 defines those terms) due to the growth in the business's number of full-time equivalent employees or in average annual gross receipts during the term of the Contract. This section (4) does not apply to an emerging small business for which a certification under ORS 200.055 expires during the term of the Contract or any extensions.

(5) Rejection of All Offers. The District may reject all Offers for Good Cause upon the District's written finding that it is in the public interest to do so. The District shall notify all Offerors of the rejection of all Offers, along with the good-cause justification and finding.

(6) Criteria for Rejection of All Offers. The District may reject all Offers upon a written finding that:

(a) The content of or an error in the Solicitation Document or the Solicitation process unnecessarily restricted competition for the Contract;

(b) The price, quality, or performance presented by the Offerors is too costly or of insufficient quality to justify acceptance of the Offer;

(c) Misconduct, error, or ambiguous or misleading provisions in the Solicitation Document threaten the fairness and integrity of the competitive process;

(d) Causes other than legitimate market forces threaten the integrity of the competitive procurement process. These causes include, but are not limited to, those that tend to limit competition such as restrictions on competition, collusion, corruption, unlawful anti-competitive conduct, and inadvertent or intentional errors in the Solicitation Document;

(e) The District cancels the Solicitation in accordance with PPS 49-0270; or

(f) Any other circumstance indicating that awarding the Contract would not be in the public interest.

PPS 49-0450 Protest of Contractor Selection, Contract Award

(1) Purpose. An adversely affected or aggrieved Offeror shall exhaust all avenues of administrative review and relief before seeking judicial review of the District's Contractor selection or Contract award decision.

(2) Notice of Competitive Range. Unless otherwise provided in the RFP, when the competitive proposal process is authorized under PPS 49-0650, the District shall provide written notice to all Proposers of the District's determination of the Proposers included in the competitive Range. The District's notice of the Proposers included in the competitive Range shall not be final until the later of the following:

(a) 10 days after the date of the notice, unless otherwise provided therein; or

(b) Until the District provides a written response to all timely filed protests that denies the protest and affirms the notice of the Proposers included in the competitive Range.

(3) Notice of Intent to Award. Unless otherwise provided in the Solicitation Document, the District shall provide written notice to all Offerors of the District's intent to award the Contract as provided in PPS 49-0395.

(4) Right to Protest Award.

(a) An adversely affected or aggrieved Offeror may submit to the District a written protest of the District's intent to award within seven days after issuance of the notice of intent to award the Contract, unless a different protest period is provided under the Solicitation Document.

(b) The Offeror's protest shall be in writing and shall specify the grounds on which the protest is based.

(c) An Offeror is adversely affected or aggrieved only if the Offeror is eligible for award of the Contract as the Responsible bidder submitting the lowest Responsive bid or the Responsible Proposer submitting the best Responsive proposal and is next in line for award, i.e., the protesting Offeror shall claim that all lower bidders or higher-scored Proposers are ineligible for award:

(A) Because their Offers were nonresponsive; or

(B) The District committed a substantial violation of a provision in the Solicitation Document or of an applicable procurement statute or administrative rule, and the protesting Offeror was unfairly evaluated and would have, but for such substantial violation, been the Responsible bidder offering the lowest bid or the Responsible Proposer offering the highest ranked proposal.

(d) The District shall not consider a protest submitted after the time period established in this rule or such different period as may be provided in the Solicitation Document. A Proposer may not protest the District's decision not to increase the size of the competitive Range above the size of the competitive Range set forth in the RFP.

(5) Right to Protest Competitive Range.

(a) An adversely affected or aggrieved Proposer may submit to the District a written protest of the District's decision to exclude the Proposer from the competitive Range within seven days after issuance of the notice of the competitive Range, unless a different protest period is provided under the Solicitation Document. (See procedural requirements for the use of RFPs at PPS 49-0650.)

(b) The Proposer's protest shall be in writing and shall specify the grounds on which the protest is based.

(c) A Proposer is adversely affected only if the Proposer is responsible and submitted a Responsive proposal and is eligible for inclusion in the competitive Range, i.e., the protesting Proposer shall claim it is eligible for inclusion in the competitive Range if all ineligible higher-scoring Proposers are removed from consideration, and that those ineligible Proposers are ineligible for inclusion in the competitive Range because:

(A) Their Proposals were not Responsive; or

(B) The District committed a substantial violation of a provision in the RFP or of an applicable procurement statute or administrative rule, and the protesting Proposer was unfairly evaluated and would have, but for such substantial violation, been included in the competitive Range.

(d) The District shall not consider a protest submitted after the time period established in this rule or such different period as may be provided in the Solicitation Document. A Proposer may not

protest the District's decision not to increase the size of the competitive Range above the size of the competitive Range set forth in the RFP.

(6) Authority to Resolve Protests. The Superintendent may settle or resolve a written protest submitted in accordance with the requirements of this rule.

(7) Decision. If a protest is not settled, the Superintendent, or such Person's designee, shall promptly issue a written decision on the protest. Judicial review of this decision will be available if provided by statute.

(8) Award. The successful Offeror shall promptly execute the Contract after the award is final. The District shall execute the Contract only after it has obtained all applicable required documents and approvals.

PPS 49-0460 Performance and Payment Security; Waiver

(1) Public Improvement Contracts. Unless the required performance bond is waived under ORS 279C.380(1)(a) or this rule, excused in cases of emergency under ORS 279C.380(4), or unless the District exempts a Contract or classes of Contracts from the required performance bond and payment bond pursuant to ORS 279C.390, the Contractor shall execute and deliver to the District a performance bond and a payment bond each in a sum equal to the Contract Price for all Public Improvement Contracts. This requirement applies only to Public Improvement Contracts with a value, estimated by the District, of more than $100,000 or, in the case of Contracts for highways, bridges and other transportation projects, more than $50,000. See 279C.380(5). Also see OAR 137-049-0815 and BOLI rules at 839-025-0015 regarding the separate requirement for a Public Works bond.

(2) Other Construction Contracts. The District may require performance security for other construction Contracts that are not Public Improvement Contracts. Such requirements shall be expressly set forth in the Solicitation Document.

(3) Requirement for Surety Bond. The District shall accept only a performance bond furnished by a surety company authorized to do business in Oregon unless otherwise specified in the Solicitation Document (i.e., the District may accept a cashier's check or certified check in lieu of all or a portion of the required performance bond if specified in the Solicitation Document). The payment bond shall be furnished by a surety company authorized to do business in Oregon, and in an amount equal to the full Contract Price.

(4) Time for Submission. The apparent successful Offeror shall promptly furnish the required performance security at the District's request. If the Offeror fails to furnish the performance security as requested, the District may reject the Offer and award the Contract to the Responsible bidder with the next lowest Responsive bid or the Responsible Proposer with the next highest-scoring Responsive proposal, and, at the District's discretion, the Offeror shall forfeit its bid or proposal security.

PPS 49-0470 Substitute Contractor

If the Contractor provided a performance bond, the District may afford the Contractor's surety the opportunity to provide a substitute contractor to complete performance of the Contract. A substitute contractor shall perform all remaining Contract Work and comply with all terms and conditions of the Contract, including the provisions of the performance bond and the payment bond. Such substitute performance does not involve the award of a new Contract and shall not be subject to the competitive procurement provisions of ORS 279C.

PPS 49-0490 Foreign Contractor

If the Contract Price exceeds $10,000 and the Contractor is a Foreign Contractor, the Contractor shall promptly report to the Oregon Department of Revenue on forms provided by the Department of Revenue, the Contract Price, terms of payment, Contract duration, and such other information as the Department of Revenue may require before final payment can be made on the Contract. A copy of the report shall be

forwarded to the District. The District shall satisfy itself that the above requirements have been complied with before it issues final payment on the Contract.

ALTERNATIVE CONTRACTING METHODS

PPS 49-0600 Alternative Contracting Methods; Purpose

These PPS 49-0600 to PPS 49-0690 rules are intended to provide guidance to the District regarding the use of Alternative Contracting Methods for Public Improvement Contracts, as may be directed by the Contract Review Board under ORS 279C.335. These Alternative Contracting Methods include, but are not limited to, the following forms of contracting: Design-Build, Energy Savings Performance, and the Construction Manager/General Contractor Method. To the extent any such Alternative Contracting Methods are utilized within the competitive bidding process set forth in ORS 279C.335(1), these OAR 137-049-0600 to 137-049-0690 rules are advisory only and may be used or referred to by the District in whole, in part or not at all, within the discretion of the District. As to ESPC contracting, these PPS 49-0600 through PPS 49-0690 rules implement the requirements of ORS 279C.335 pertaining to the adoption of Model Rules appropriate for use by the entire District to govern the procedures for entering into ESPCs. As to contracting for Construction Manager General Contractor services, requiring an exemption from competitive bidding under ORS 279C.335(2), PPS 49-0600 to 49-0690 include mandatory and optional provisions pertaining to the procurement of Construction Manager/General Contractor services, pursuant to the requirements of ORS 279C.337.

PPS 49-0610 Definitions for Alternative Contracting Methods

The following definitions shall apply to rules PPS 49-0600 to 49-0690, unless the context requires otherwise:

(1) **Affiliate** has the meaning set forth in ORS 279C.332(1).

(2) **Alternative Contracting Methods** mean innovative techniques for procuring or performing Public Improvement Contracts, utilizing processes other than the traditional methods involved in the design-bid-build construction contracting method (with award of a Public Improvement Contract based solely on price, in which a final design is issued with formal bid documents, construction services are obtained by sealed bid awarded to the Responsible bidder submitting the lowest Responsive bid, and the project is built in accordance with those documents). In industry practice, such methods commonly include variations of Design-Build contracting, CM/GC forms of contracting, and ESPCs, which are specifically addressed in these PPS 49-0600 to 49-0690 rules. These methods also include other developing techniques which include but are not limited to general "performance contracting," "cost-plus-time " contracting, (as more particularly described in ORS 279C.332(3)(b)(D)(iii)(I)) and "qualifications plus project approach" contracting (as more particularly described in ORS 279C.332(3)(b)(D)(iii)(II)). Procedural requirements for these methods are identified in these PPS 49-0600 to 49-0690 rules when the District uses an Alternative Contracting Method in a procurement that requires an exemption from competitive bidding under ORS 279C.335(2) or in an ESPC procurement that is excepted from competitive bidding under ORS 279.335(1).

(3) **Construction Manager/General Contractor** (or **"CM/GC"**) has the meaning set forth in ORS 279C.332(2).

(4) **Construction Manager/General Contractor Method** (or **"CM/GC Method"**) means the Alternative Contracting Method which involves a District's selection of a CM/GC to perform CM/GC services for a project or projects.

(5) **Construction Manager/General Contractor Services** (or **"CM/GC Services"**) has the meaning set forth in ORS 279C.332(3).

(6) **Design-Build** means a form of procurement that results in a Public Improvement Contract in which the construction Contractor also provides or obtains specified design services, participates on the project team with the District, and manages both design and construction. In this form of Contract, a single Person

provides the District with all of the Personal services and construction Work necessary to both design and construct the project.

(7) Early Work means construction services, construction materials and other Work authorized by the parties to be performed under the CM/GC Contract in advance of the establishment of the GMP, fixed price or other maximum, not-to-exceed price for the project. Permissible Early Work shall be limited to early procurement of materials and supplies, early release of bid or proposal packages for site development and related activities, and any other advance Work related to important components of the project for which performance prior to establishment of the GMP will materially and positively affect the development or completion of the project.

(8) Energy Conservation Measures (or "ECMs") (also known as **"energy efficiency measures"**) means, as used in ESPC procurement, any equipment, fixture, or furnishing to be added to or used in an existing building or structure, and any repair, alteration, or improvement to an existing building or structure that is designed to reduce energy consumption and related costs, including those costs related to electrical energy, thermal energy, water consumption, waste disposal, and future contract-labor costs and materials costs associated with maintenance of the building or structure. For purposes of these PPS 49-0600 to 49-0690 rules, use of either or both of the terms "building" or "structure" shall be deemed to include existing energy, water, and waste disposal systems connected or related to or otherwise used for the building or structure when such system(s) are included in the project, either as part of the project together with the building or structure, or when such system(s) are the focus of the project. Maintenance services are not Energy Conservation Measures for purposes of these PPS 49-0600 to 49-0690 rules.

(9) Energy Savings Guarantee means the energy savings and performance guarantee provided by the ESCO under an ESPC procurement, which guarantees to the District that certain energy savings and performance will be achieved for the project covered by the RFP through the installation and implementation of the agreed-upon ECMs for the project. The Energy Savings Guarantee shall include, but shall not be limited to, the specific energy savings and performance levels and amounts that will be guaranteed, provisions related to the financial remedies available to the District in the event the guaranteed savings and performance are not achieved, the specific conditions under which the ESCO will guarantee energy savings and performance (including the specific responsibilities of the District after final completion of the design and construction phase), and the term of the energy savings and performance guarantee.

(10) Energy Savings Performance Contract (or "ESPC") means a Public Improvement Contract between the District and a Qualified Energy service Company for the identification, evaluation, recommendation, design, and construction of Energy Conservation Measures, including a Design-Build Contract, that guarantee energy savings or performance.

(11) General Conditions Work (or "GC Work") means a general grouping of project Work required to support construction operations on the project that is not included within the Contractor's overhead or fee.

(12) Guaranteed Maximum Price (or "GMP") has the meaning set forth in ORS 279C.332(4), pertaining to procurements for CM/GC services. For Alternative Contracting Methods other than the CM/GC Method, "Guaranteed Maximum Price" or "GMP" means the total maximum price provided to the District by the Contractor, and accepted by the District, that includes all reimbursable costs of and fees for completion of the Contract Work, and any particularly identified contingency amounts as defined by the Public Improvement Contract.

(13) Measurement and Verification (or "M & V") means, as used in ESPC procurement, the examination of installed ECMs using the International Performance Measurement and Verification Protocol ("IPMVP"), or any other comparable protocol or process, to monitor and verify the operation of energy-using systems pre-installation and post-installation.

(14) Project Development Plan means a secondary phase of Personal services and Work performed by an ESCO in an ESPC procurement when the ESCO performs more extensive design of the agreed-upon ECMs

for the project, provides the detailed provisions of the ESCO's Energy Savings Guarantee that the fully installed and commissioned ECMs will achieve a particular energy savings level for the building or structure, and prepares an overall report or plan summarizing the ESCO's services during this secondary phase of the work and otherwise explaining how the agreed-upon ECMs will be implemented during the design and construction phase of the work. The term "project development plan" can also refer to the report or plan provided by the ESCO at the conclusion of this phase of the work.

(15) Qualified Energy Service Company (or "ESCO") means, as used in ESPC procurement, a company, firm, or other legal Person with the following characteristics: demonstrated technical, operational, financial, and managerial capabilities to design, install, construct, commission, manage, measure and verify, and otherwise implement Energy Conservation Measures and other Work on building systems or building components that are directly related to the ECMs in existing buildings and structures; a prior record of successfully performing ESPCs on projects involving existing buildings and structures that are comparable to the project under consideration by the District; and the financial strength to effectively guarantee energy savings and performance under the ESPC for the project in question, or the ability to secure necessary financial measures to effectively guarantee energy savings under an ESPC for that project.

(16) Savings has the meaning set forth in ORS 279C.337(4), pertaining to CM/GC services procurements. For other Alternative Contracting Methods, "Savings" means a positive difference between a Guaranteed Maximum Price or other maximum not-to-exceed price set forth in a Public Improvement Contract and the actual cost of the Contractor's performance of the Contract Work payable by the District under the terms of the Contract, including costs for which the District reimburses a Contractor and fees, profits or other payments the Contractor earns.

(17) Technical Energy Audit, means, as used in ESPC procurement, the initial phase of services to be performed by an ESCO that includes a detailed evaluation of an existing building or structure, an evaluation of the potential ECMs that could be effectively utilized at the facility, and preparation of a report to the District of the ESCO's findings during this initial phase of the work. The term "Technical Energy Audit" can also refer to the report provided by the ESCO at the conclusion of this phase of the work.

PPS 49-0620 Use of Alternative Contracting Methods

(1) Competitive Bidding Exemptions. ORS 279C requires a competitive bidding process for Public Improvement Contracts unless a statutory exception applies, a class of Contracts has been exempted from the competitive bidding process, or an individual Contract has been exempted from the competitive bidding process in accordance with 279C.335 and any applicable District rules. Use of Alternative Contracting Methods may be directed by the District if that use is within the competitive bidding process if feasible, or through an available statutory exception to the competitive bidding process. Use of Alternative Contracting Methods shall be directed through the District's Local Contract Review Board, however, when use of the Alternative Contracting Method requires an exemption to the prescribed competitive bidding requirement of ORS 279C.335. In any of these circumstances, use of Alternative Contracting Methods shall be justified in accordance with any applicable Code and District requirements and, if require, these PPS 049-0600 to 049-0690 rules. See PPS 49-0630 regarding required findings and restrictions on exemptions from the competitive bidding requirements under ORS 279C.335.

(2) Energy Savings Performance Contracts. ESPCs are excepted from the competitive Bidding requirements for Public Improvement Contracts pursuant to ORS 279C.335(1)(f) if the District complies with the procedures set forth in these PPS 49-0600 through 49-0690 or parallel administrative rules meeting the requirements of ORS 279A.065 related to the Solicitation, rules related to the solicitation, negotiation and contracting for ESPC Work. If those procedures are not followed, an ESPC procurement may still be exempted from competitive bidding requirements by following the general exemption procedures within ORS 279C.335.

(3) Post-Project Evaluation. ORS 279C.355 requires that the District prepare a formal post-project evaluation of Public Improvement projects in excess of $100,000 when the District does not use the competitive bidding process required by ORS 279C.335. The purpose of this evaluation is to determine whether it was actually in the District's best interest to use an Alternative Contracting Method outside the competitive bidding process. The evaluation shall be delivered to the Contract Review Board of the District as applicable within 30 days of the date the District "accepts" the Public Improvement project, which event is typically defined in the Contract. In the absence of such definition, acceptance of the project occurs on the later of the date of final payment or the date of final completion of the Contract Work. ORS 279C.355 describes the timing and content of this evaluation, with three required elements:

(a) Financial information, consisting of cost estimates, any GMP changes, and actual costs;

(b) A narrative description of successes and failures during design, engineering, and construction; and

(c) An objective assessment of the use of the Alternative Contracting Method as compared to the exemption findings.

PPS 49-0630 Findings, Notice, and Hearing

(1) Cost Savings and Other Substantial Benefits Factors. When findings are required under ORS 279C.335 to exempt a Contract or class of Contracts from the competitive Bidding requirements, the "substantial cost savings" and "other substantial benefits "criteria at ORS 279C.335(2)(b) require consideration of the type, cost, the amount of the Contract and, to the extent applicable, the other factors set forth in 279C.335(2)(b). If a particular factor has no application whatsoever to the particular Public Improvement Contract or class of Public Improvement Contracts, the District Local Contract Review Board does not need to consider that factor, and the District is not required to address the factor, other than to explain why the factor has no application whatsoever to the particular Public Improvement Contract or class of Public Improvement Contracts.

(2) Required Information. The statutory definition of "findings" at ORS 279C.330(2) which applies to exemptions from competitive bidding means the justification for the District's conclusion regarding the factors listed in both ORS 279C.335(2)(a) and 279C.335(2)(b) or, in the alternative, both ORS 279C.335(2)(a) and 279C.335(2)(c).

(3) Addressing Cost Savings. Accordingly, when the Contract or class of Contracts under consideration for an exemption contemplates the use of Alternative Contracting Methods, the "substantial cost savings and other substantial benefits" requirement may be addressed by a combination of:

(a) Specified findings that address the factors and other information specifically identified by statute, including, but not limited to, an analysis or reasonable forecast of present and future cost savings and other substantial benefits; and

(b) Additional findings that address industry practices, surveys, trends, past experiences, evaluations of completed projects required by ORS 279C.355, and related information regarding the expected benefits and drawbacks of particular Alternative Contracting Methods. To the extent practicable, such findings shall relate back to the specific characteristics of the project or projects at issue in the exemption request; and

(c) As an alternative to the "substantial cost savings and other substantial benefits" requirement in ORS 279C.335(2)(b), if an Alternative Contracting Method has not been previously used, the District may make a finding that identifies the project as a "pilot project" under ORS 279C.335(2)(c). Nevertheless, the District shall still make the findings required in ORS 279C.335(2)(a).

(4) Favoritism and Competition. The criteria at ORS 279C.335(2)(a) that the exemption "is unlikely to encourage favoritism" or "substantially diminish competition" may be addressed in contemplating the use of Alternative Contracting Methods by specifying the manner in which an RFP process will be utilized, that the procurement will be formally advertised with public notice and disclosure of the planned Alternative Contracting Method, competition will be encouraged, award will be made based upon identified selection criteria, and an opportunity will be given to protest that award.

(5) Descriptions. findings supporting a competitive bidding exemption shall describe with specificity any Alternative Contracting Method to be used in lieu of competitive bidding, including, but not limited to, whether a one-step (Request for proposal), two-step (beginning with a Request for Qualification, followed by a Request for proposal) or other solicitation process will be utilized. The findings may also describe anticipated characteristics or features of the resulting Public Improvement Contract. However, the purpose of an exemption from competitive bidding is limited to a determination of the procurement method. Any unnecessary or incidental descriptions of the specific details of the anticipated Contract within the supporting findings are not binding upon the District. The parameters of the Public Improvement Contract are those characteristics or specifics that are announced in the Solicitation Document.

(6) Class Exemptions. In making the findings supporting a class exemption, the District shall clearly identify the class with respect to its defining characteristics, pursuant to the requirements of ORS 279C.335(3). The class shall meet the following requirements:

(a) The class cannot be based on a single characteristic or factor, so that an Agency directly or indirectly creates a class whereby the Agency uses, for example, the CM/GC Method for all Agency construction projects or all Agency construction projects over a particular dollar amount, unidentified future Agency construction projects of a particular work category, or all Agency construction projects from a particular funding source such as the sale of bonds; and

(b) The class shall include a combination of factors, be defined by the Agency through characteristics that reasonably relate to the exemption criteria set forth in ORS 279C.335(2) and shall reflect a detailed evaluation of those characteristics so that the class is defined in a limited way that effectively meets the Agency's objectives while allowing for impartial and open competition, and protecting the integrity of the exemption process. An example of a class that might be permitted under the statute is a series of projects, such as a specific group of building renovation projects, that:

(A) involve renovations for a common purpose;

(B) require completion on a related schedule in order to avoid unnecessary disruption of District operations;

(C) share common characteristics, such as historic building considerations, the presence of asbestos or other hazardous substances, or the presence of agency staff during construction;

(D) otherwise possess characteristics that meet the requirements of ORS 279C.335(2); and

(E) otherwise meet the requirements of the Director of the District Local Contract Review Board.

(7) Public Hearing. Before final adoption of findings exempting a Public Improvement Contract from the requirement of competitive Bidding, the District shall give notice and provide interested with the opportunity to request a public hearing as required by ORS 279C.335(5). The notice must state that, in response to a written request, the District will hold a public hearing for the purpose of taking comments on the draft Findings for an exemption from the competitive bidding requirement. If the District does not receive a written request from an interested party to hold a public hearing, the District may hold a public hearing, but

is not required to hold a public hearing. If a hearing is requested, the District will hold a public hearing for the purpose of receiving public comment on the District's draft findings.

PPS 49-0640 Competitive Proposals; Procedure

The District may utilize the following RFP process for Public Improvement Contracts, allowing flexibility in both proposal evaluation and Contract negotiation, only in accordance with ORS 279C.330 to 279C.337, ORS 279C.400 through 279C.410 and PPS 49-0600 through 49-0690, unless other applicable statutes control the District's use of competitive Proposals for Public Improvement Contracts. Also see the section of rules in this division entitled Formal procurement rules, PPS 49-0200 through 49-0450, and RFP-related rules under the Alternative Contracting Methods section at PPS 49-0640 through 49-0660. For ESPCs, the following RFP process as further specified in PPS 049-0645, 049-0650, 049-0660 and 049-0680 shall be utilized if the District desires the procurement process to be exempt from the competitive Bidding requirements of ORS 279C.335. The RFP process for the Alternative Contracting Methods identified in PPS 49-0600 through 49-0690 includes the following steps:

(1) Proposal Evaluation. Factors in addition to price may be considered in the selection process, but only as set forth in the RFP. proposal evaluation shall be as objective as possible. Evaluation factors need not be precise predictors of future costs and performance, but to the extent possible such evaluation factors shall:

- **(a)** Be reasonable estimates based on information available to the District;
- **(b)** Treat all Proposals equitably; and
- **(c)** Recognize that public policy requires that Public Improvements be constructed at the least overall cost to the District. See ORS 279C.305.

For ESPC proposal evaluations, the District may provide in the RFP that qualifications-based evaluation factors will outweigh the District's consideration of price-related factors, due to the fact that prices for the major components of the work to be performed during the ESPC process contemplated by the RFP will likely not be determinable at the time of proposal evaluation. For CM/GC services proposal evaluations, the District shall comply with ORS 279C.337.

(2) Evaluation Factors.

- **(a)** In basic negotiated construction contracting where the only reason for an RFP is to consider factors other than price, those factors may consist of firm and personnel experience on similar projects, adequacy of equipment and physical plant, sources of supply, availability of key personnel, financial capacity, past performance, safety records, project understanding, proposed methods of construction, proposed milestone dates, references, service, and related matters that could affect the cost or quality of the work.
- **(b)** In CM/GC contracting, in addition to subsection (a) above, those factors may also include the ability to respond to the technical complexity or unique character of the project, analyze and propose solutions or approaches to complex project problems, analyze and propose value engineering options, analyze and propose energy efficiency measures or alternative energy options, coordinate multiple disciplines on the project, effectively utilize the time available to commence and complete the improvement, and related matters that could affect the cost or quality of the work.
- **(c)** In Design-Build contracting, in addition to subsections (a) and (b) above, those factors may also include design professional qualifications, specialized experience, preliminary design submittals, technical merit, design-builder team experience, and related matters that could affect cost or quality of the work.

(d) In ESPC contracting, in addition to the factors set forth in subsections (a), (b), and (c) above, those factors may also include sample Technical Energy Audits from similar projects, sample M & V reports, financial statements and related information of the ESCO for a time period established in the RFP, financial statements and related information of joint ventures comprising the ESCO, the ESCO's capabilities and experience in performing energy baseline studies for facilities (independently or in cooperation with an independent third-party energy baseline consultant), past performance of the ESCO in meeting energy guarantee contract levels, the specific Person that will provide the Energy Savings Guarantee to be offered by the ESCO, the ESCO's management plan for the project, information on the specific methods, techniques, and equipment that the ESCO will use in the performance of the work under the ESPC, the ESCO's team members and consultants to be assigned to the project, the ESCO's experience in the energy savings performance contracting field, the ESCO's experience acting as the prime contractor on previous ESPC projects (as opposed to a subcontractor or consultant to a prime ESCO), the ESCO's vendor and product neutrality related to the development of ECMs, the ESCO's project history related to removal from an ESPC project or the inability or unwillingness of the ESCO to complete an ESPC project, the ESCO's M & V capabilities and experience (independently or in cooperation with an independent third-party M & V consultant), the ESCO's ability to explain the unique risks associated with ESPC projects and the assignment of risk in the particular project between the District and the ESCO, the ESCO's equipment performance guarantee policies and procedures, the ESCO's energy savings and cost savings guarantee policies and procedures, the ESCO's project cost guarantee policies and procedures, the ESCO's pricing methodologies, the price that the ESCO will charge for the Technical Energy Audit phase of the work, and the ESCO's fee structure for all phases of the ESPC project.

(3) Contract Negotiations. Contract terms may be negotiated to the extent allowed by the RFP and PPS 49-0600 through PPS 49-0690, provided that the general Work scope remains the same and that the field of competition does not change as a result of material changes to the requirements stated in the Solicitation Document. See PPS 49-0650. Terms that may be negotiated consist of details of Contract performance; methods of construction, timing, and assignment of risk in specified areas; fee; and other matters that could affect the cost or quality of the work. For the CM/GC Method, terms that may be negotiated also include the specific scope of pre-construction services, the GC Work, any Early Work and other construction Work to be performed by the CM/GC, and any other terms that the District has identified as being subject to negotiation, consistent with the requirements of OAR 137-049-0690. In ESPC contracting, terms that may be negotiated also include the scope of preliminary design of ECMs to be evaluated by the parties during the Technical Energy Audit phase of the work, the scope of services to be performed by the ESCO during the project Development Plan phase of the work, the detailed provisions of the Energy Savings Guarantee to be provided by the ESCO, and scope of work, methodologies, and compensation terms and conditions during the design and construction phase and M & V phase of the work, consistent with the requirements of PPS 49-0680.

PPS 49-0645 Requests for Qualifications ("RFQ")

As provided by ORS 279C.405(1), the District may utilize a Request for Qualifications, (RFQ) to obtain information useful in the preparation or distribution of a Request for Proposals (RFPs). When using an RFQ as the first step in a two-step solicitation process in which distribution of the RFPs will be limited to the firms identified as most qualified through their submitted statements of qualification, the District shall first advertise and provide notice of the RFQ in the same manner in which RFPs are advertised, specifically stating that RFPs will be distributed only to the firms selected in the RFQ process. In such cases, the District shall also provide within the RFQ a protest provision substantially in the form of PPS 49-0450(5) regarding protests of the competitive Range. Thereafter, the District may distribute RFPs to the selected firms without further advertisement of the Solicitation.

PPS 49-0650 Requests for Proposals ("RFP")

(1) Generally. The use of competitive Proposals shall be specially authorized for a Public Improvement Contract under the competitive Bidding exception and exemption requirements of ORS 279C.335, PPS 49-0130, and PPS 49-0600 through 49-0690. Also see ORS 279C.337 and ORS 279C.400 to 279C.410 for statutory requirements regarding competitive Proposals, and PPS 49-0640 regarding competitive proposal procedures.

(2) Solicitation Documents. In addition to the Solicitation Document requirements of PPS 49-0200, this rule applies to the requirements for RFPs. RFP Solicitation Documents shall conform to the following standards:

(a) The District shall set forth selection criteria in the Solicitation Document. Examples of evaluation criteria include price or cost, quality of a product or service, past performance, management, capability, personnel qualification, prior experience, compatibility, reliability, operating efficiency, expansion potential, experience of key personnel, adequacy of equipment or physical plant, financial wherewithal, sources of supply, references, and warranty provisions. See PPS 49-0640 regarding proposal evaluation and evaluation factors. Evaluation factors need not be precise predictors of actual future costs and performance, but to the extent possible, such factors shall be reasonable estimates based on information available to the District. Subject to 279(C).410(4), the Solicitation Document may provide for discussions with Proposers to be conducted for the purpose of proposal evaluation prior to award or prior to establishing any competitive Range;

(b) When the District is willing to negotiate terms and conditions of the Contract or allow submission of revised Proposals following discussions, the District shall identify the specific terms and conditions in or provisions of the Solicitation Document that are subject to negotiation or discussion and authorize Offerors to propose certain alternative terms and conditions in lieu of the terms and conditions the District has identified as authorized for negotiation. The District shall describe the evaluation, discussion, and negotiation process, including how the District shall establish the competitive Range, if any;

(c) The anticipated size of any competitive Range shall be stated in the Solicitation Document but may be decreased if the number of Proposers that submit responsive Proposals is less than the specified number, or may be decreased as provided in PPS 49-0650(4)(a).

(d) When the District intends to award Contracts to more than one Proposer, the District shall identify in the Solicitation Document the manner in which it will determine the number of Contracts it will award. The District shall also include the criteria it will use to determine how the District shall endeavor to achieve optimal value, utility, and substantial fairness when selecting a particular Contractor to provide Personal services or Work from those Contractors awarded Contracts.

(3) Evaluation of Proposals.

(a) Evaluation. The District shall evaluate Proposals only in accordance with criteria set forth in the RFP and applicable law. The District shall evaluate Proposals to determine the Responsible Proposer or Proposers submitting the best Responsive proposal or Proposals.

(A) Clarifications. In evaluating Proposals, the District may seek information from a Proposer to clarify the Proposer's proposal. A Proposer shall submit written and signed clarifications and such clarifications shall become part of the Proposer's proposal.

(B) Limited Negotiation. If the District did not permit negotiation in its Request for proposal, the District may, nonetheless, negotiate with the highest ranked Proposer, but may then only negotiate the:

(i) Statement of work; and

(ii) Contract Price as it is affected by negotiating the statement of work.

The process for discussions or negotiations that is outlined and explained in Sections (5)(b) and (6) of this rule does not apply to this limited negotiation.

(b) Discussions; Negotiations. If the District permitted discussions or negotiations in the Request for proposal, the District shall evaluate Proposals and establish the competitive Range, and may then conduct discussions and negotiations in accordance with this rule.

(A) If the Solicitation Document provided that discussions or negotiations may occur at the District's discretion, the District may forego discussions and negotiations and evaluate all Proposals in accordance with this rule.

(B) If the District proceeds with discussions or negotiations, the District shall establish a negotiation team tailored for the acquisition. The District's team may include legal, technical, auditing, and negotiating personnel.

(c) Cancellation. Nothing in this rule shall restrict or prohibit the District from canceling the Solicitation at any time.

(4) Competitive Range; Protest; Award.

(a) Determining Competitive Range.

(A) If the District does not cancel the Solicitation, after the Opening the District shall evaluate all Proposals in accordance with the evaluation criteria set forth in the RFP. After evaluation of all Proposals in accordance with the criteria set forth in the RFP, the District shall rank the Proposers based on the District's scoring and determine the competitive Range.

(B) The District may increase the number of Proposers in the competitive Range if the District's evaluation of Proposals establishes a natural break in the scores of Proposers indicating a number of Proposers greater than the initial competitive Range are closely competitive or have a reasonable chance of being determined the best Proposer after the District's evaluation of revised Proposals submitted in accordance with the process described in this rule.

(b) Protesting Competitive Range. The District shall provide written notice to all Proposers identifying Proposers in the competitive Range. A Proposer that is not within the competitive Range may protest the District's evaluation and determination of the competitive Range in accordance with PPS 49-0450.

(c) Intent to award; Discuss or Negotiate. After the protest period provided in accordance with these rules expires, or after the District has provided a final response to any protest, whichever date is later, the District may either:

(A) Provide written notice to all Proposers in the competitive Range of its intent to award the Contract to the highest ranked Proposer in the competitive Range.

(i) An unsuccessful Proposer may protest the District's intent to award in accordance with PPS 49-0450.

(ii) After the protest period provided in accordance with PPS 49-0450 expires, or after the District has provided a final response to any protest, whichever date is later, the District shall commence final Contract negotiations with the highest ranked Proposer in the competitive Range; or

(B) Engage in discussions with Proposers in the competitive Range and accept revised Proposals from them, and, following such discussions and receipt and evaluation of revised Proposals, conduct negotiations with the Proposers in the competitive Range.

(5) Discussions; Revised Proposals. If the District chooses to enter into discussions with and receive revised Proposals from the Proposers in the competitive Range, the District shall proceed as follows:

(a) Initiating Discussions. The District shall initiate oral or written discussions with all of the Proposers in the competitive Range regarding their Proposals with respect to the provisions of the RFP that the District identified in the RFP as the subject of discussions. The District may conduct discussions for the following purposes:

(A) Informing Proposers of deficiencies in their initial Proposals;

(B) Notifying Proposers of parts of their Proposals for which the District would like additional information; and

(C) Otherwise allowing Proposers to develop revised Proposals that will allow the District to obtain the best proposal based on the requirements and evaluation criteria set forth in the RFP.

(b) Conducting Discussions. The District may conduct discussions with each Proposer in the competitive Range necessary to fulfill the purposes of this section, but need not conduct the same amount of discussions with each Proposer. The District may terminate discussions with any Proposer in the competitive Range at any time. The District shall, however, offer all Proposers in the competitive Range the opportunity to discuss their Proposals with the District before the District notifies Proposers of the date and time pursuant to this section that revised Proposals will be due.

(A) In conducting discussions, the District:

(i) Shall treat all Proposers fairly and shall not favor any Proposer over another;

(ii) Shall not discuss other Proposers' Proposals;

(iii) Shall not suggest specific revisions that a Proposer should make to its proposal, and shall not otherwise direct the Proposer to make any specific revisions to its proposal.

(B) At any time during the time allowed for discussions, the District may:

(i) Continue discussions with a particular Proposer;

(ii) Terminate discussions with a particular Proposer and continue discussions with other Proposers in the competitive Range; or

(iii) Conclude discussions with all remaining Proposers in the competitive Range and provide notice to the Proposers in the competitive Range to submit revised Proposals.

(c) Revised Proposals. If the District does not cancel the Solicitation at the conclusion of the District's discussions with all remaining Proposers in the competitive Range, the District shall give all remaining Proposers in the competitive Range notice of the date and time by which they shall submit revised Proposals. This notice constitutes the District's termination of discussions, and Proposers shall submit revised Proposals by the date and time set forth in the District's notice.

(A) Upon receipt of the revised Proposals, the District shall evaluate the revised Proposals based on the evaluation criteria set forth in the RFP and rank the revised Proposals based on the District's scoring.

(B) The District may conduct discussions with and accept only one revised proposal from each Proposer in the competitive Range unless otherwise set forth in the RFP.

(d) Intent to Award; Protest. The District shall provide written notice to all Proposers in the competitive Range of the District's intent to award the Contract. An unsuccessful Proposer may protest the District's intent to award in accordance with PPS 49-0450. After the protest period provided in accordance with that rule expires, or after the District has provided a final response to any protest, whichever date is later, the District shall commence final Contract negotiations.

(6) Negotiation.

(a) Initiating Negotiations. The District may determine to commence negotiations with the highest ranked Proposer in the competitive Range following the:

(A) Initial determination of the competitive Range; or

(B) Conclusion of discussions with all Proposers in the competitive Range and evaluation of revised Proposals.

(b) Conducting Negotiations

(A) Scope: The District may negotiate:

(i) The statement of work;

(ii) The Contract Price as it is affected by negotiating the statement of work; and

(iii) Any other terms and conditions reasonably related to those expressly authorized for negotiation in the RFP. Accordingly, Proposers shall not submit, and the District shall not accept, for negotiation any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFP.

(c) Continuing Negotiations. If the District terminates negotiations with a Proposer, the District may then commence negotiations with the next highest-scoring Proposer in the competitive Range, and continue the process described in this rule until the District has:

(A) Determined to award the Contract to the Proposer with whom it is currently negotiating; or

(B) Completed one round of negotiations with all Proposers in the competitive Range, unless the District provided for more than one round of discussions or negotiations in the Request for proposal, in which case the District may proceed with any authorized further rounds of negotiations.

(7) Terminating Discussions or Negotiations. At any time during discussions or negotiations conducted in accordance with this rule, the District may terminate discussions or negotiations with the Proposer with whom it is currently conducting discussions or negotiations if the District reasonably believes that:

(a) The Proposer is not discussing or negotiating in good faith; or

(b) Further discussions or negotiations with the Proposer will not result in the parties agreeing to the terms and conditions of a final Contract in a timely manner.

PPS 49-0660 RFP Pricing Mechanisms

(1) An RFP may result in a Contract with a lump-sum Contract Price or a fixed Contract Price, as in the case of competitive Bidding. Alternatively, a Request for proposal may result in a cost reimbursement Contract with a GMP or some other maximum price specified in the Contract.

(2) Economic incentives or disincentives may be included to reflect stated District purposes related to time of completion, safety, or other Public Contracting objectives, including but not limited to total least-cost mechanisms such as life cycle Costing.

(3) A Guaranteed Maximum Price may be used as the pricing mechanism for CM/GC services Contracts where a total Contract Price is provided in the design phase in order to assist the District in determining whether the project scope is within the District's budget and allowing for design changes during preliminary design rather than after final design services have been completed.

- **(a)** If the collaborative process described above in this section (3) is successful, the Contractor shall propose a final GMP, which may be accepted by the District and included within the Contract.
- **(b)** If the collaborative process described above in this section (3) is not successful and no mutually agreeable resolution on the GMP for the project construction Work can be achieved with the Contractor, then the District shall terminate the Contract. The District may then proceed to negotiate a new Contract (and GMP) with the Proposer that was next-ranked in the original selection process, or employ other means for continuing the project under ORS 279C.

(4) When Cost Reimbursement Contracts are utilized, regardless of whether a GMP is included, the District shall provide for audit controls that will effectively verify rates and ensure that costs are reasonable, allowable, and properly allocated.

PPS 49-0670 Design-Build Contracts

(1) General. The Design-Build form of contracting, as defined at PPS 49-0610(3), has technical complexities that are not readily apparent. The District shall use this contracting method only with the assistance of knowledgeable staff or Consultants who are experienced in its use. In order to use the Design-Build process, the District shall be able to reasonably anticipate the following types of benefits:

- **(a)** Obtaining, through a Design-Build team, engineering design, plan preparation, value engineering, construction engineering, construction, quality control, and required documentation as a fully integrated function with a single point of responsibility;
- **(b)** Integrating value engineering suggestions into the design phase, as the construction Contractor joins the project team early with design responsibilities under a team approach, with the potential of reducing Contract changes;
- **(c)** Reducing the risk of design flaws, misunderstandings, and conflicts inherent in construction Contractors building from designs in which they have had no opportunity for input, with the potential of reducing Contract claims;
- **(d)** Shortening project time as construction activity (early submittals, mobilization, subcontracting, and advance Work) commences prior to completion of a "Biddable" design, or where a design solution is still required (as in complex or phased projects); or
- **(e)** Obtaining innovative design solutions through the collaboration of the Contractor and design team, which would not otherwise be possible if the Contractor had not yet been selected.

(2) Authority. The District shall utilize the Design-Build form of contracting only in accordance with the requirements of these PPS 49-0600 through 49-0690 rules. See particularly PPS 49-0620 pertaining to Alternative Contracting Methods and PPS 49-0680 pertaining to ESPCs.

(3) Selection. Design-Build selection criteria may include those factors set forth above in PPS 49-0640(2)(a), (b), and (c).

(4) QBS Inapplicable. Because the value of construction services predominates the Design-Build form of Contracting, the qualifications-based selection ("QBS") process mandated by ORS 279C.110 for the District in certain circumstances in obtaining certain Consultant services is not applicable.

(5) Licensing. If a Design-Build Contractor is not an Oregon-licensed design professional, the District shall require that the Design-Build Contractor disclose in its written Offer that it is not an Oregon-licensed design professional, and identify the Oregon-licensed design professional(s) who will provide design services. See ORS 671.030(5) regarding the offer of Architectural services, and ORS 672.060(11) regarding the offer of Engineering services that are appurtenant to construction services.

(6) Performance Security. ORS 279C.380(1)(a) provides that for Design-Build Contracts, the surety's obligation on performance bonds, or the bidder's obligation on cashier's or certified checks accepted in lieu thereof, includes the preparation and completion of design and related professional services specified in the Contract. This additional obligation, beyond performance of construction services, extends only to the provision of professional services and related design revisions, corrective Work, and associated costs prior to final completion of the Contract (or for such longer time as may be defined in the Contract). The obligation is not intended to be a substitute for professional liability insurance, and does not include errors and omissions or latent defects coverage.

(7) Contract Requirements. The District shall conform their Design-Build contracting practices to the following requirements:

(a) Design Services. The level or type of design services required shall be clearly defined within the procurement documents and Contract, along with a description of the level or type of design services previously performed for the project. The services to be performed shall be clearly delineated as either design specifications or performance standards, and performance measurements shall be identified.

(b) Professional Liability. The Contract shall clearly identify the liability of design professionals with respect to the Design-Build Contractor and the District, as well as requirements for professional liability insurance.

(c) Risk Allocation. The Contract shall clearly identify the extent to which the District requires an express indemnification from the Design-Build Contractor for any failure to perform, including professional errors and omissions, design warranties, construction operations, and faulty Work claims.

(d) Warranties. The Contract shall clearly identify any express warranties made to the District regarding characteristics or capabilities of the completed project (regardless of whether errors occur as the result of improper design, construction, or both), including any warranty that a design will be produced that meets the stated project performance and budget guidelines.

(e) Incentives. The Contract shall clearly identify any economic incentives and disincentives, the specific criteria that apply, and their relationship to other financial elements of the Contract.

(f) Honoraria. If allowed by the RFP, honoraria or stipends may be provided for early design submittals from qualified finalists during the Solicitation process on the basis that the District is benefited from such deliverables.

PPS 49-0680 Energy Savings Performance Contracts

(1) Generally. These PPS 49-0600 through PPS 49-0690 rules include a limited, efficient method for the District to enter into ESPCs outside the competitive Bidding requirements of ORS 279C.335 for existing buildings or structures, but not for new construction. If the District chooses not to utilize the ESPC procurement method provided for by these PPS 49-0600 through 49-0690 rules, the District may still enter into an ESPC by complying with the competitive Bidding exemption process set forth in ORS 279C.335, or by otherwise complying with the procurement requirements applicable to any district not subject to all the requirements of ORS 279C.335.

(2) ESPC Contracting Method. The ESPC form of contracting, as defined at PPS 49-0610(6), has unique technical complexities associated with the determination of what ECMs are feasible for the District, as well as the additional technical complexities associated with a Design-Build Contract. The District shall only utilize the ESPC contracting method with the assistance of knowledgeable staff or Consultants who are experienced in its use. In order to utilize the ESPC contracting process, the District shall be able to reasonably anticipate one or more of the following types of benefits:

(a) Obtaining, through an ESCO, the following types of integrated Personal services and Work: facility profiling, energy baseline studies, ECMs, Technical Energy Audits, project development planning, engineering design, plan preparation, cost estimating, life cycle Costing, construction administration, project management, construction, quality control, operations and maintenance staff training, commissioning services, M & V services, and required documentation as a fully integrated function with a single point of responsibility;

(b) Obtaining, through an ESCO, an Energy Savings Guarantee;

(c) Integrating the Technical Energy Audit phase and the project Development Plan phase into the design and construction phase of work on the project;

(d) Reducing the risk of design flaws, misunderstandings, and conflicts inherent in the construction process, through the integration of ESPC Personal services and Work;

(e) Obtaining innovative design solutions through the collaboration of the members of the ESCO integrated ESPC team;

(f) Integrating cost-effective ECMs into an existing building or structure so that the ECMs pay for themselves through savings realized over the useful life of the ECMs;

(g) Preliminary design, development, implementation, and an Energy Savings Guarantee of ECMs into an existing building or structure through an ESPC as a distinct part of a major remodel of that building or structure that is being performed under a separate remodeling Contract; and

(h) Satisfying local energy efficiency design criteria or requirements.

(3) Authority. The District desiring to pursue an exemption from the competitive Bidding requirements of ORS 279C.335 (and, if applicable, ORS 351.086) shall utilize the ESPC form of contracting only in accordance with the requirements of these PPS 49-0600 to 49-0690 rules.

(4) No Findings Required. The District is only required to comply with the ESPC contracting procedures set forth in PPS 49-0600 through 49-0690 of these rules in order for the ESPC to be exempt from the competitive Bidding processes of ORS 279C.335. No findings are required for an ESPC to be exempt from the competitive Bidding process for Public Improvement Contracts pursuant to ORS 279C.335, unless the District is subject to the requirements of ORS 279C.335 and chooses not to comply with the ESPC contracting procedures set forth in these PPS 49-0600 through 49-0690 rules.

(5) Selection. ESPC selection criteria may include those factors set forth above in PPS 49-0640(2)(a), (b), (c), and (d). Since the Energy Savings Guarantee is such a fundamental component in the ESPC contracting process, Proposers shall disclose in their Proposals the identity of any Person providing (directly or indirectly) any Energy Savings Guarantee that may be offered by the successful ESCO during the course of the performance of the ESPC, along with any financial statements and related information pertaining to any such Person.

(6) Qualifications Based Selection (QBS). Because the value of construction services predominates in the ESPC method of contracting, the QBS process mandated by ORS 279C.110 for the State Contracting Agencies in obtaining certain Consultant services is not applicable.

(7) Licensing. If the ESCO is not an Oregon-licensed design professional, the District shall require that the ESCO disclose in the ESPC that it is not an Oregon-licensed design professional, and identify the Oregon-licensed design professional(s) who will provide design services. See ORS 671.030(5) regarding the offer of architectural services, and ORS 672.060(11) regarding the offer of engineering services that are appurtenant to construction Work.

(8) Performance Security. At the point in the ESPC when the parties enter into a binding Contract that constitutes a Design-Build Contract, the ESCO shall provide a performance bond and a payment bond, each for 100 percent of the full Contract Price, including the construction and design and related professional services specified in the ESPC Design-Build Contract, pursuant to ORS 279C.380(1)(a). For ESPC Design-Build Contracts, these "design and related professional services" include conventional design services, commissioning services, training services for the District's operations and maintenance staff, and any similar professional services provided by the ESCO under the ESPC Design-Build Contract prior to final completion of construction. M & V services, and any Personal services and Work associated with the ESCO's Energy Savings Guarantee, are not included in these ORS 279C.380(1)(a) "design and related professional services." Nevertheless, the District may require that the ESCO provide performance security for M & V services and any services associated with the ESCO's Energy Savings Guarantee, if the District so provides in the RFP.

(9) Contracting Requirements. The District shall conform their ESPC contracting practices to the following requirements:

(a) General ESPC Contracting Practices. An ESPC involves a multi-phase project, which includes the following contractual elements:

(A) A contractual structure which includes general Contract terms describing the relationship of the parties, the various phases of the work, the contractual terms governing the Technical Energy Audit for the project, the contractual terms governing the project Development Plan for the project, the contractual terms governing the final design and construction of the project, the contractual terms governing the performance of the M & V services for the project, and the detailed provisions of the ESCO's Energy Savings Guarantee for the project.

(B) The various phases of the ESCO's Work will include the following:

(i) The Technical Energy Audit phase of the work;

(ii) The project Development Plan phase of the work;

(iii) A third phase of the work that constitutes a Design-Build Contract, during which the ESCO completes any plans and specifications required to implement the ECMs that have been agreed to by the parties to the ESPC, and the ESCO performs all construction, commissioning, construction administration, and related Personal services and Work to actually construct the project; and

(iv) A final phase of the work whereby the ESCO, independently or in cooperation with an independent Consultant hired by the District, performs M & V services to ensure that the Energy Savings Guarantee identified by the ESCO in the earlier phases of the work and agreed to by the parties has actually been achieved.

(b) Design-Build Contracting Requirements in ESPCs. At the point in the ESPC when the parties enter into a binding Contract that constitutes a Design-Build Contract, the District shall conform its Design-Build contracting practices to the Design-Build contracting requirements set forth in PPS 49-0670(7).

(c) Pricing Alternatives. The District may utilize one of the following pricing alternatives in an ESPC:

(A) A fixed price for each phase of the Personal services and Work to be provided by the ESCO;

(B) A cost reimbursement pricing mechanism, with a maximum not-to-exceed price or a GMP; or

(C) A combination of a fixed fee for certain components of the Personal services to be performed, a cost reimbursement pricing mechanism for the construction Work to be performed with a GMP, a single or annual fixed fee for M & V services to be performed for an identified time period after final completion of the construction Work, and a single or annual Energy Savings Guarantee fixed fee payable for an identified time period after final completion of the construction Work that is conditioned on certain energy savings being achieved at the facility by the ECMs that have been implemented by the ESCO during the project (in the event an annual M & V services fee and annual Energy Savings Guarantee fee is utilized by the parties, the parties may provide in the Design-Build Contract that, at the sole option of the District, the ESCO's M & V services may be terminated prior to the completion of the M & V/Energy Savings Guarantee period and the District's future obligation to pay the M & V services fee and Energy Savings Guarantee fee will likewise be terminated, under terms agreed to by the parties).

(d) Permitted ESPC Scope of Work. The scope of work under the ESPC is restricted to implementation and installation of ECMs, as well as other Work on building systems or building components that are directly related to the ECMs, and that, as an integrated unit, will completely pay for themselves or substantially pay for themselves over the useful life of the ECMs installed. The permitted scope of work for ESPCs resulting from a solicitation under these PPS 49-0600 through PPS 49-0690 rules does not include maintenance services for the project facility.

PPS 49-0690 Construction Manager/General Contractor Services ("CM/GC Services")

(1) General. The CM/GC Method is a technically complex project delivery system. The District shall use this contracting method only with 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 a 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. Unlike the Design-Build form of contracting, the CM/GC Method does not contemplate a "single point of responsibility" under which the CM/GC is responsible for successful completion of all Work related to a performance specification. The CM/GC has defined Contract obligations, including responsibilities as part of the project team along with the District and design professional, although with the CM/GC Method there is a separate contract between the District and design professional. In order to utilize the CM/GC Method, the District shall be able to reasonably anticipate the following types of benefits:

(a) Time Savings. With the CM/GC Method, the Public Improvement has significant schedule ramifications, such that concurrent design and construction are necessary in order to meet critical deadlines and shorten the overall duration of construction. The District may consider operational and financial data that show significant savings or increased opportunities for generating revenue as a result of early completion, as well as less disruption to public facilities as a result of shortened construction periods;

(b) Cost Savings. With the CM/GC Method, early CM/GC input during the design process is expected to contribute to significant cost savings. The District may consider value engineering, building systems analysis, life cycle Costing analysis, and construction planning that lead to cost savings. The District shall specify any special factors influencing this analysis, including high rates of inflation, market uncertainty due to material and labor fluctuations or scarcities, and the need for specialized construction expertise due to technical challenges; or

(c) Technical Complexity. With the CM/GC Method, the Public Improvement presents significant technical complexities that are best addressed by a collaborative or team effort between the District, design professionals, any District project management or technical consultants and the CM/GC, in which the CM/GC will assist in addressing specific project challenges through preconstruction services. The District may consider the need for CM/GC input on issues such as operation of the facility during construction, tenant occupancy, public safety, delivery of an early budget or GMP, financing, historic preservation, difficult remodeling projects, and projects requiring complex phasing or highly coordinated scheduling.

(2) Authority. The District shall use the CM/GC form of contracting only in accordance with the requirements of these division 49 rules and ORS 279C.337, when a competitive bidding exemption is approved. See particularly PPS 49-0600 on "Purpose" and PPS 49-0620 on "Use of Alternative Contracting Methods."

(3) Selection. CM/GC selection criteria may include those factors set forth in PPS 49-0640(2)(b).

(4) Basis for Payment. The CM/GC process adds specified construction manager Personal services to traditional design-bid-build general contractor Work, requiring full Contract performance within a negotiated GMP, fixed Contract Price or other maximum Contract Price. For a GMP pricing method, the basis for payment is reimbursable direct costs as defined under the Contract, plus a fee constituting full payment for construction Work and Personal services rendered, which together shall not exceed the GMP. See GMP definition at PPS 49-0610(7) and pricing mechanisms at PPS 49-0660.

(5) Contract Requirements. The District shall conform their CM/GC contracting practices to the following requirements:

(a) Nature of the Initial CM/GC Services Contract Document. A solicitation for CM/GC services is a procurement for a Public Improvement, since the scope of the procurement includes not only pre-construction Personal services to be performed by the CM/GC, but also construction Work that is expected to result in a completed Public Improvement. In the traditional CM/GC services contracting approach, the text of the resulting CM/GC services Contract will include comprehensive contract provisions that will not only fully govern the relationship between the District and the CM/GC for the pre-construction Personal services, but will also include the general contract provisions that will control the CM/GC's providing of the construction Work necessary to complete the project (with any remaining necessary construction-related contract provisions being added through Early Work amendments to the Contract, the GMP amendment to the Contract or, if necessary, a conventional amendment to the Contract). The traditional CM/GC services contracting approach, however, also contemplates that the District shall only authorize the CM/GC to perform the preconstruction Personal services when the Contract is first executed unless construction Work is specifically included in the initial CM/GC Contract. Under this approach, the construction phase or phases of the CM/GC services project are not yet authorized and the Contract only becomes a Public Improvement Contract once the parties amend the Contract, through an Early Work or a GMP amendment, to authorize the construction of a portion of the project or the entire project. See also OAR 839-025-0020, regarding the Bureau of Labor and Industries' determination of when a Contract for CM/GC services becomes a "public works" Contract for purposes of paying prevailing wage rates for construction Work under the CM/GC Contract.

(b) Setting the GMP, Fixed Contract Price or Other Maximum Contract Price. The GMP fixed Contract price or other maximum Contract Price shall be set at an identified time consistent with industry practice and project conditions and after supporting information reasonably considered necessary to its use has been developed, which will normally take place at the end of the design development phase of the project. The supporting information for the GMP shall define both what Personal services and construction Work are included and excluded from the GMP, fixed

Contract price or other maximum Contract Price. A set of project drawings and specifications shall be produced establishing the scope of construction Work contemplated by the GMP fixed Contract price or other maximum Contract Price.

(c) Adjustments to the GMP Fixed Contract Price or Other Maximum Contract Price. The Contract shall clearly identify the standards or factors under which changes or additional construction Work will be considered outside of the Work scope other warrants an increase in the GMP, fixed Contract Price or other maximum Contract Price, as well as criteria for decreasing the GMP, fixed Contract Price or other maximum Contract Price. The GMP, fixed Contract Price or other maximum Contract Price shall not be increased without a concomitant increase to the scope of the work defined at the establishment of the GMP, fixed Contract Price or other maximum Contract Price or most recent amendment to the GMP, fixed Contract Price or other maximum Contract Price. An increase to the scope of the work may take the form of conventional additions to the project scope, as well as corrections to the Contract terms and conditions, additions to insurance coverage required by the District and other changes to the work.

(d) Cost Savings. The Contract shall clearly identify the disposition of any Cost Savings resulting from completion of the work below the GMP; fixed Contract price or other maximum Contract price, that is, under what circumstances, if any, the CM/GC might share in those Cost Savings, or whether the Cost Savings accrue only to the District's benefit. Unless there is a clearly articulated reason for sharing the Cost Savings set forth in the Contract, the Cost Savings shall accrue to the District.

(e) Cost Reimbursement. The Contract shall clearly identify what items or categories of items are eligible for cost reimbursement within the GMP or other maximum Contract Price, including any category of GC Work, and may also incorporate a mutually agreeable cost-reimbursement standard.

(f) Audit. Cost reimbursements shall be made subject to final audit adjustment, and the Contract shall establish an audit process to ensure that Contract costs are allowable, properly allocated, and reasonable.

(g) Fee. Compensation for the CM/GC's Personal services and construction Work, where the Contract uses a GMP, shall include a fee that is inclusive of profit, overhead, and all other indirect or non-reimbursable costs. Costs determined to be included within the fee shall be expressly defined in the Contract terms and conditions at the time the District selects the GM/GC. The fee, which may be expressed as either a fixed dollar amount or as a proposed percentage of all reimbursable costs, shall be identified during and become an element of the selection process. It shall subsequently be expressed as a fixed amount for particular construction Work authorized to be performed, when Early Work is added to the Contract through an amendment and when the GMP is established. The CM/GC fee does not include any fee paid to the CM/GC for performing pre-construction services during a separate pre-construction phase.

(h) Incentives. The Contract shall clearly identify any economic incentives, the specific criteria that apply, and their relationship to other financial elements of the Contract (including the GMP, fixed Contract Price or other maximum Contract Price).

(i) Controlled Insurance Programs. For projects where an owner-controlled or contractor-controlled insurance program is permitted under ORS 737.602, the Contract shall clearly identify whether an owner-controlled or contractor-controlled insurance program is anticipated or allowable. If so, the Contract shall clearly identify (1) anticipated cost savings from reduced premiums, claims reductions, and other factors, (2) the allocation of cost savings, and (3) safety responsibilities, incentives or both safety responsibilities and incentives.

(j) Early Work. The RFP shall clearly identify, whenever feasible, the circumstances under which any Early Work may be authorized and undertaken for compensation prior to establishing the GMP, fixed Contract price, or other maximum Contract Price.

(k) Subcontractor Selection. Subcontracts under the Contract are not Public Contracts within the meaning of the Code. However, the Contract shall include provisions that clearly meet the requirements of ORS 279C.337(3) and other District requirements. Within the scope of ORS 279C.337(3), the CM/GC's subcontractor selection process shall meet the following parameters:

(A) Absent a written justification prepared by the CM/GC and approved by the District as more particularly provided for in this section, the CM/GC's Subcontractor selection process shall be "competitive," meaning that the process should include publicly-advertised subcontractor solicitations and be based on a low-bid competitive method, a low-quote competitive method for contracts in a specified dollar range agreeable to the District, or a method whereby both price and qualifications of the subcontractors are evaluated in a competitive environment, consistent with the RFP and Contract requirements;

(B) When the Subcontractor selection process for a particular Work package will not be "competitive" as provided for in this section, the process shall meet the following requirements:

(i) The CM/GC shall prepare and submit a written justification to the District, explaining the project circumstances that support a non-competitive Subcontractor selection process for a particular Work package, including, but not limited to, Emergency circumstances, the CM/GC's need to utilize a key Subcontractor member of the CM/GC's project team consistent with the CM/GC's project proposal, the need to meet other specified Contract requirements, the continuation or expansion of an existing Subcontractor agreement that was awarded through a competitive process along with facts supporting the continuation or expansion of the Subcontractor agreement, or a sole source justification;

(ii) For a sole source selection of a subcontractor to proceed, the District shall evaluate the written justification provided by the CM/GC and shall find that critical project efficiencies require utilization of labor, services or materials from one subcontractor; that technical compatibility issues on the project require labor, services or materials from one subcontractor; that particular labor, services or materials are needed as part of an experimental or pilot project or as part of an experimental or pilot aspect of the project; or that other project circumstances exist to support the conclusion that the labor, services or materials are available from only one subcontractor;

(iii) The CM/GC shall provide an independent cost estimate for the work package that will be subject to the non-competitive process, if required by the District;

(iv) The CM/GC shall fully respond to any questions or comments submitted to the CM/GC by the District; and

(v) The District shall approve the CM/GC's use of the non-competitive Subcontractor selection process prior to the CM/GC's pursuit of the non-competitive process.

(C) A competitive selection process may be preceded by a publicly advertised sub-contractor pre-qualification process, with only those subcontractors meeting the pre-qualification requirements being invited to participate in the later competitive process through which the CM/GC will select the subcontractor to perform the construction Work described in the selection process;

(D) If the CM/GC or an Affiliate or subsidiary of the CM/GC will be included in the subcontractor selection process to perform particular construction Work on the project, the CM/GC shall disclose that fact in the selection process documents and announcements. The Contract shall also identify the conditions, processes and procedures the CM/GC will utilize in that competitive process in order to make the process impartial, competitive and fair, including but not limited to objective, independent review and opening of bids or proposals for the elements of work involved, by a representative of the District or another independent third party.

(l) Subcontractor Approvals and Protests. The Contract shall clearly establish whether the District shall approve subcontract awards, and to what extent, if any, the District shall resolve or be involved in the resolution of protests of the CM/GC's selection of subcontractors and suppliers. The procedures and reporting mechanisms related to the resolution of subcontractor and suppler protests shall be established in the Contract with certainty, including the CM/GC's roles and responsibilities in this process and whether the CM/GC's subcontracting records are considered to be public records. In any event, the District shall retain the right to monitor the subcontracting process in order to protect the District's interests and to confirm the CM/GC's compliance with the Contract and with applicable statutes, administrative rules and other legal requirements.

(m) CM/GC Self-Performance or Performance by CM/GC Affiliates or Subsidiaries Without Competition. Consistent with the requirements of ORS 279C.337(3)(c), the Contract shall establish the conditions under which the CM/GC or an Affiliate or subsidiary of the CM/GC may perform elements of the construction Work without competition from subcontractors, including, for example, job-site GC Work. Other than for GC Work, in order for the CM/GC or an Affiliate or subsidiary of the CM/GC to perform elements of the construction Work without competition from subcontractors, the CM/GC shall provide, or shall have included in the CM/GC's RFP proposal to perform CM/GC services for the project, a detailed proposal for performance of the work by the CM/GC or an Affiliate or subsidiary of the CM/GC. If required by the District, the CM/GC's proposal to perform the construction Work shall be supported by at least one independent cost estimate prior to the work being included in the Contract.

(n) Unsuccessful Subcontractor Briefing. ORS 279C.337(3)(e) is designed to allow a subcontractor who was not selected by the CM/GC to perform a particular element of the construction Work to obtain specific information from the CM/GC, and meet with the CM/GC to discuss the subcontractor qualification and selection process involved and the CM/GC's subcontractor selection decisions, in order to better understand why the subcontractor was not successful in being selected to perform the particular element of the work and to improve the subcontractor's substantive qualifications or the subcontractor's methods in competing for elements of the work for the particular project involved, or for future projects. The briefing meetings may be held with individual subcontractors or, if the subcontractors agree, in groups of subcontractors, with those groups established by bid package or other designation agreed to by the contracting agency and the CM/GC. Nevertheless, the CM/GC is not obligated to provide this briefing opportunity unless the CM/GC receives a written request from a subcontractor to discuss the subcontractor qualification and selection process involved. Unless the District and the CM/GC agree on a different schedule, the CM/GC Contract should include provisions:

(A) Allowing a subcontractor 60 days from the CM/GC's notice of award of a subcontract for a particular Work package to request, in writing, a post-selection meeting with the CM/GC under this section; and

(B) Requiring the CM/GC to set a meeting with the subcontractor under this section within 45 days of the subcontractor's written request.

(o) Performance and Payment Bonds. Provided no construction Work is included with the preconstruction services to be performed under the initial form of the CM/GC Contract, no performance bond or payment bond is required to be provided by the CM/GC at the time of Contract signing, consistent with ORS 279C.380. Once construction Work is included in the Contract and authorized by the District to be performed by the CM/GC, however, the CM/GC shall provide a performance bond and payment bond each in the full amount of any Early Work to be performed by the CM/GC, or the full amount of the GMP, fixed Contract price or other maximum Contract Price, as applicable. Furthermore, in the event additional Early Work is added to the CM/GC Contract after the initial Early Work or in the event an amendment to the CM/GC Contract is made so that the GMP, fixed price or other maximum contract price shall be increased, the performance bond and the payment bond shall each be increased in an amount equal to the additional Early Work or the increased GMP, fixed price or other maximum contract price.

(p) Independent Review of CM/GC Performance; Conflicts of Interest. If the District requires independent review, monitoring, inspection or other oversight of a CM/GC's performance of pre-construction Personal services, construction Work or both pre-construction Personal services and construction Work, the District shall obtain those independent review services from a Contractor independent of the CM/GC, the CM/GC's Affiliates and the CM/GC's Subcontractors, pursuant to the requirements of ORS 279C.307. However, ORS 279C.307 does not prohibit the following:

(A) The CM/GC's performance of both pre-construction Personal services and construction Work that are included within the definition of CM/GC services, consistent with ORS 279C.307(2); or

(B) The CM/GC's performance of internal quality control services, quality assurance services or other internal peer review of CM/GC work product that is intended to confirm the CM/GC's performance of the CM/GC Contract according to its terms.

(q) Socio-Economic Programs. The Contract shall clearly identify conditions relating to any required socio-economic programs (such as Affirmative Action or Prison Inmate Labor Programs), including the manner in which such programs affect the CM/GC's subcontracting requirements, the enforcement mechanisms available, and the respective responsibilities of the CM/GC and the District.

CONTRACT PROVISIONS

PPS 49-0800 Required Contract Clauses

Except as provided by PPS 49-0150 and 49-0160, the District shall include in all Solicitation Documents for Public Improvement Contracts all of the ORS 279C-required Contract clauses, as set forth in the checklist contained in PPS 49-0200(1)(c) regarding Solicitation Documents. The following series of rules provides further guidance regarding particular Public Contract provisions.

PPS 49-0810 Waiver of Delay Damages Against Public Policy

The District shall not place any provision in a Public Improvement Contract purporting to waive, release, or extinguish the rights of a Contractor to damages resulting from the District's unreasonable delay in performing the Contract. However, Contract provisions requiring notice of delay, providing for alternative dispute resolution such as arbitration (where allowable) or mediation, providing other procedures for settling contract disputes, or providing for reasonable liquidated damages are permissible.

PPS 49-0815 BOLI Public Works Bond

Pursuant to ORS 279C.830(2), the specifications for every Public Works Contract shall contain a provision stating that the Contractor and every subcontractor shall have a Public Works bond filed with the

Construction Contractors Board before starting Work on the project, unless otherwise exempt. This bond is in addition to performance bond and payment bond requirements. See BOLI rule at OAR 839-025-0015.

PPS 49-0820 Retainage

(1) Withholding of Retainage. The District shall not retain an amount in excess of 5 percent of the Contract Price for Work completed. If the Contractor has performed at least 50 percent of the Contract Work and is progressing satisfactorily, upon the Contractor's submission of written application containing the surety's written approval, the District may, in its discretion, reduce or eliminate Retainage on any remaining progress payments. The District shall respond in writing to all such applications within a reasonable time. When the Contract Work is 97½ percent completed, the District may, at its discretion and without application by the Contractor, reduce the retained amount to 100 percent of the value of the remaining unperformed Contract Work. The District may at any time reinstate Retainage. Retainage shall be included in the final payment of the Contract Price.

(2) Form of Retainage. Unless the District finds in writing that accepting a bond or instrument described in section (2)(a) or (2)(b) of this rule poses an extraordinary risk that is not typically associated with the bond or instrument, the District, in lieu of withholding moneys from payment, shall accept from a Contractor:

(a) Bonds, securities, or other instruments that are deposited and accepted as provided in section (4)(a) of this rule; or

(b) A surety bond deposited as provided in section (4)(b) of this rule.

(3) Deposit in Interest-Bearing Accounts. Upon request of the Contractor, the District shall deposit cash Retainage in an interest-bearing account in a bank, savings bank, trust company, or savings association, for the benefit of the District. Earnings on such account shall accrue to the Contractor. The District shall establish the account through the State Treasurer.

(4) Alternatives to Cash Retainage. In lieu of cash Retainage to be held by the District, the Contractor may substitute one of the following:

(a) Deposit of bonds, securities, or other instruments.

(A) The Contractor may deposit bonds, securities, or other instruments with the District or in any bank or trust company to be held for the benefit of the District. If the District accepts the deposit, the District shall reduce the cash Retainage by an amount equal to the value of the bonds and securities, and reimburse the excess to the Contractor.

(B) Bonds, securities, or other instruments deposited or acquired in lieu of cash Retainage shall be of a character approved by the District, including, but not limited to:

(i) Bills, certificates, notes, or bonds of the United States.

(ii) Other obligations of the United States or agencies of the United States.

(iii) Obligations of a corporation wholly owned by the federal government.

(iv) Indebtedness of the Federal National Mortgage Association.

(v) General obligation bonds of the State of Oregon or a political subdivision of the State of Oregon.

(vi) Irrevocable letters of credit issued by an insured institution, as defined in ORS 706.008.

(C) Upon the District's determination that all requirements for the protection of the District's interests have been fulfilled, it shall release to the Contractor all bonds and securities deposited in lieu of Retainage.

(b) Deposit of Surety Bond. The District, at its discretion, may allow the Contractor to deposit a surety bond in a form acceptable to the District in lieu of all or a portion of funds retained or to be retained. A Contractor depositing such a bond shall accept surety bonds from its subcontractors and suppliers in lieu of Retainage. In such cases, Retainage shall be reduced by an amount equal to the value of the bond, and the excess shall be reimbursed.

(5) Recovery of Costs. The District may recover from the Contractor all costs incurred in the proper handling of Retainage by reduction of the final payment.

(6) Additional Retainage When Certified Payroll Statements Not Filed. Pursuant to ORS 279C.845(7), if a Contractor is required to file certified payroll statements and fails to do so, the District shall retain 25 percent of any amount earned by the Contractor on a Public Works Contract until the Contractor has filed such statements with the District. The District shall pay the Contractor the amount retained under this provision within 14 days after the Contractor files the certified statements, regardless of whether a subcontractor has filed such statements (but see ORS 279C.845(1) regarding the requirement for both Contractors and subcontractors to file certified statements with the District). See BOLI rule at OAR 839-025-0010.

PPS 49-0830 Contractor Progress Payments

(1) Request for Progress Payments. Each month the Contractor shall submit to the District their written request for a progress payment based on an estimated percentage of Contract completion. At the District's discretion, this request may also include the value of material to be incorporated in the completed Work, which has been delivered to the premises and appropriately stored. The sum of these estimates is referred to as the "value of completed Work." With these estimates as a base, the District shall make a progress payment to the Contractor, which shall be equal to:

(a) The value of completed Work;

(b) Less those amounts that have been previously paid;

(c) Less other amounts that may be deductible or owing and due to the District for any cause; and

(d) Less the appropriate amount of Retainage.

(2) Progress Payments Do Not Mean Acceptance of work. Progress payments shall not be construed as an acceptance or approval of any part of the work, and shall not relieve the Contractor of responsibility for defective workmanship or material.

PPS 49-0840 Interest

(1) Prompt Payment Policy. The District shall pay promptly all payments due and owing to the Contractor on Contracts for Public Improvements.

(2) Interest on Progress Payments. Late payment interest shall begin to accrue on payments due and owing on the earlier of 30 days after receipt of invoice or 15 days after District approval of payment (the "Progress Payment Due Date"). The interest rate shall equal three times the discount rate on 90-day commercial paper in effect on the Progress Payment Due Date at the Federal Reserve Bank in the Federal Reserve District that includes Oregon, up to a maximum rate of 30 percent.

(3) Interest on Final Payment. Final payment on the Contract Price, including Retainage, shall be due and owing no later than 30 days after Contract completion and acceptance of the work. Late-payment interest on such final payment shall thereafter accrue at the rate of one and one-half percent per month until paid.

(4) Settlement or Judgment Interest. In the event of a dispute as to compensation due a Contractor for Work performed, upon settlement or judgment in favor of the Contractor, interest on the amount of the settlement or judgment shall be added to, and not made part of, the settlement or judgment. Such interest, at

the discount rate on 90-day commercial paper in effect at the Federal Reserve Bank in the Federal Reserve District that includes Oregon, shall accrue from the later of the Progress Payment Due Date, or 30 days after the Contractor submitted a claim for payment to the District in writing or otherwise in accordance with the Contract requirements.

PPS 49-0850 Final Inspection

(1) Notification of Completion; Inspection. The Contractor shall notify the District in writing when the Contractor considers the Contract Work completed. Within 15 days of receiving the Contractor's notice, the District shall inspect the project and project records, and will either accept the work or notify the Contractor of remaining Work to be performed.

(2) Acknowledgment of Acceptance. When the District finds that all Work required under the Contract has been completed satisfactorily, the District shall acknowledge acceptance of the work in writing.

PPS 49-0860 Public Works Contracts

(1) Generally. ORS 279C.800 to 279C.870 regulates Public Works Contracts, as defined in ORS 279C.800(6), and requirements for payment of prevailing wage rates. Also see the administrative rules of the Bureau of Labor and Industries (BOLI) at OAR Chapter 839.

(2) Required Contract Conditions. As detailed in the above statutes and rules, every Public Works Contract shall contain the following provisions:

- **(a)** District authority to pay certain unpaid claims and charge such amounts to Contractors, as set forth in ORS 279C.515(1).
- **(b)** Maximum hours of labor and overtime, as set forth in ORS 279C.520(1).
- **(c)** Employer notice to employees of hours and days that employees may be required to Work, as set forth in ORS 279C.520(2).
- **(d)** Contractor-required payments for certain services related to sickness or injury, as set forth in ORS 279C.530.
- **(e)** A requirement for payment of prevailing rate of wage, as set forth in ORS 279C.830(1). If both state and federal prevailing rates of wage apply, the contract and every subcontract shall provide that all workers shall be paid the higher of the applicable state or federal prevailing rate of wage.
- **(f)** A requirement for filing a public works bond by the contractor and every subcontractor, as set forth in ORS 279(C).830(2).

(3) Requirements for Specifications. The specifications for every Public Works Contract, consisting of the procurement package (such as the project Manual, bid or proposal booklets, Request for quotes, or similar procurement specifications), shall contain the following provisions:

- **(a)** The state prevailing rate of wage, and, if applicable, the federal prevailing rate of wage, as required by ORS 279C.830(1)(a):
  - **(A)** Physically contained within or attached to hard copies of procurement specifications;
  - **(B)** Included by a statement incorporating the applicable wage rate publication into the specifications by reference in compliance with OAR 839-025-0020; or
  - **(C)** When the rates are available electronically or by Internet access, the rates may be incorporated into the specifications by referring to the rates and providing adequate information on how to access them in compliance with OAR 839-025-0020.

(b) If both state and federal prevailing rates of wage apply, a requirement that the Contractor shall pay the higher of the applicable state or federal prevailing rate of way to all workers. See BOLI rules at OAR 839-025-0020 and-0035.

(c) A requirement for filing a public works bond by the Contractor and every subcontractor, as set forth in ORS 279C.830(2).

PPS 49-0870 Specifications; Brand Name Products

(1) Generally. The District's Solicitation Document shall not expressly or implicitly require any product by brand name or mark, nor shall it require the product of any particular manufacturer or seller, except pursuant to an exemption granted under ORS 279C.345(2).

(2) Equivalents. The District may identify products by Brand Names as long as the following language: "approved equal," "or equal," "approved equivalent," or "equivalent," or similar language is included in the Solicitation Document. The District shall determine, in its sole discretion, whether an Offeror's alternate product is "equal" or "equivalent."

(3) Product Exemption. The Superintendent is delegated the authority to exempt products from the prohibition in section (1) of this rule, pursuant to ORS 279C.345(2), upon any of the following written findings:

(a) It is unlikely that the exemption will encourage favoritism in the awarding of Public Improvement Contracts or substantially diminish competition for Public Improvement Contracts;

(b) The specification of a product by Brand Name or mark, or the product of a particular manufacturer or seller, would result in substantial cost savings to the District;

(c) There is only one manufacturer or seller of the product of the quality required; or

(d) Efficient utilization of existing equipment or supplies requires the acquisition of compatible equipment or supplies.

PPS 49-0880 Records Maintenance; Right to Audit Records

(1) Records Maintenance; Access. Contractors and subcontractors shall maintain all fiscal records relating to Contracts in accordance with generally accepted accounting principles ("GAAP"). In addition, Contractors and subcontractors shall maintain all other records necessary to clearly document (i) their performance, and (ii) any claims arising from or relating to their performance under a Public Contract. Contractors and subcontractors shall make all records pertaining to their performance and any claims under a Contract (the books, fiscal records, and all other records, hereafter referred to as "Records") accessible to the District at reasonable times and places, whether or not litigation has been filed as to such claims.

(2) Inspection and Audit. The District may, at reasonable times and places, have access to and an opportunity to inspect, examine, copy, and audit the Records of any Person that has submitted cost or pricing data according to the terms of a Contract to the extent that the Records relate to such cost or pricing data. If the Person shall provide cost or pricing data under a Contract, the Person shall maintain such Records that relate to the cost or pricing data for three years from the date of final payment under the Contract, unless a shorter period is otherwise authorized in writing.

(3) Records Inspection; Contract Audit. The District and its authorized representatives shall be entitled to inspect, examine, copy, and audit any Contractor's or subcontractor's Records, as provided in section (1) of this rule. The Contractor and subcontractor shall maintain the Records and keep the Records accessible and available at reasonable times and places for a minimum period of three years from the date of final payment under the Contract or subcontract, as applicable, or until the conclusion of any audit, controversy, or litigation arising out of or related to the Contract, whichever date is later, unless a shorter period is otherwise authorized in writing.

PPS 49-0890 District Payment for Unpaid Labor or Supplies

(1) Contract Incomplete. If the Contract is still in force, the District may, in accordance with ORS 279C.515(1), pay a valid claim to the Person furnishing the labor or services, and charge the amount against payments due or to become due to the Contractor under the Contract. If the District chooses to make such a payment as provided in ORS 279C.515(1), the Contractor and the Contractor's surety shall not be relieved from liability for unpaid claims.

(2) Contract Completed. If the Contract has been completed and all funds disbursed to the prime Contractor, all claims shall be referred to the Contractor's surety for resolution. The District shall not make payments to subcontractors or suppliers for Work already paid for by the District.

PPS 49-0900 Contract Suspension; Termination Procedures

(1) Suspension of work. In the event the District suspends performance of work for any reason considered by the District to be in the public interest other than a labor dispute, the Contractor shall be entitled to a reasonable extension of Contract time and to reasonable compensation for all costs, including a reasonable allowance for related overhead, incurred by the Contractor as a result of the suspension.

(2) Termination of Contract by Mutual Agreement for Reasons Other Than Default.

(a) Reasons for termination. The parties may agree to terminate the Contract or a divisible portion thereof if:

(A) The District suspends Work under the Contract for any reason considered to be in the public interest (other than a labor dispute, or any judicial proceeding relating to the work filed to resolve a labor dispute); and

(B) Circumstances or conditions are such that it is impracticable within a reasonable time to proceed with a substantial portion of the work.

(b) Payment. When a Contract, or any divisible portion thereof, is terminated pursuant to this section (2), the District shall pay the Contractor a reasonable amount of compensation for preparatory Work completed, and for costs and expenses arising out of termination. The District shall also pay for all Work completed based on the Contract Price. Unless the work completed is subject to unit or itemized pricing under the Contract, payment shall be calculated based on percent of Contract completed. No claim for loss of anticipated profits will be allowed.

(3) Public Interest Termination by the District. The District may include in its Contracts terms detailing the circumstances under which the Contractor shall be entitled to compensation as a matter of right in the event the District unilaterally terminates the Contract for any reason considered by the District to be in the public interest.

(4) Responsibility for Completed Work. Termination of the Contract or a divisible portion thereof pursuant to this rule shall not relieve either the Contractor or its surety of liability for claims arising out of the work performed.

(5) Remedies Cumulative. The District may, at its discretion, avail itself of any or all rights or remedies set forth in these rules, in the Contract, or available at law or in equity.

CONTRACT AMENDMENTS AND CHANGE ORDERS

PPS 49-0910 Public Improvement Contract Amendments and Changes to the Work

(1) Definitions for Rule. As used in this rule with regard to Public Improvement Contracts:

(a) "Amendment" means a written modification to the terms and conditions of a Public Improvement Contract, other than by Changes to the work, within the general scope of the original procurement that requires mutual agreement between the District and the Contractor.

(b) **"Changes to the work"** means a mutually agreed-upon change order, or a construction change directive or other written order issued by the District or its authorized representatives to the Contractor requiring a Change in the work within the general scope of a Public Improvement Contract and issued under its Changes provisions in administering the Contract and, if applicable, adjusting the Contract Price or Contract time for the Changed Work.

(2) Change Orders. Changes to the work are anticipated in construction and, accordingly, the District shall include Change provisions in all Public Improvement Contracts that detail the scope of the Changes clause, provide pricing mechanisms, authorize the District or its authorized representative(s) to issue Changes to the work, and provide a procedure for addressing Contractor claims for additional time or compensation. When Changes to the work are agreed to or issued consistent with the Contract's Changes provisions, they are not considered to be new procurements, and an exemption from competitive Bidding is not required for their issuance by the District. Change orders that are approved pursuant to the terms of a construction contract are not subject to the contract amendment procedures of these rules except as provided in Subsection 5 of this section.

(3) Change Order Authority. The District may establish internal limitations and delegations for authorizing Changes to the work, including dollar limitations. Dollar limitations on Changes to the work are not set by these rules, but such Changes are limited by the above definition of that term.

(4) Contract Amendments. Public Improvement Contract amendments within the general scope of the original procurement are not considered to be new procurements, and an exemption from competitive Bidding is not required in order to add components or phases of work specified in or reasonably implied from the Solicitation Document. Amendments to a Public Improvement Contract may be made only when:

(a) They are within the general scope of the original procurement;

(b) The field of competition and Contractor selection would not likely have been affected by the Contract modification. Factors to be considered in making that determination include similarities in Work, project site, relative dollar values, differences in risk allocation, and whether the original procurement was accomplished through competitive Bidding, competitive Proposals, competitive quotes, sole-source, or Emergency Contract;

(c) In the case of a Contract obtained under an Alternative Contracting Method, any additional Work was specified or reasonably implied within the findings supporting the competitive Bidding exemption; and

(d) The amendment is made consistent with this rule and other applicable legal requirements.

~~**(5) Reporting Requirement for Amendments/Change Orders That Exceed 125 Percent of Original Contract Price**.~~

(e) ~~A Contract Amendment or Change Order or cumulative Contract Amendments or Change Orders that increase the total Contract Price to greater than 125 percent of the original Contract Price shall be reported to the School Board, except in any of the following circumstances:~~

~~**(D)** The Original Contract Price does not exceed $500,000.~~

~~**(E)** The Superintendent determines that the Amendment, additional scope, or alternative work was contemplated in the original procurement and provided for in the original Contract, and the School Board previously approved the entire scope and/or maximum renewal terms. (Examples include a solicitation and contract that provides for renewal or extension for subsequent terms or a contract that specifically allows for alternates or additional work.)~~

~~**(F)** Where a CM/GC or Design/Build Contract authorizes Early Work Amendments and requires execution of the GMP amendment to establish the total Contract Price, the GMP amendment shall establish the "Original Contract Price" for purposes of this Rule.~~

(f) ~~Contracts subject to the reporting requirement under this Rule shall be reported to the School Board a second time if subsequent Amendments or Change Orders increase the total Contract Price to greater than 150 percent of the original Contract Price.~~

(g) ~~Contracts subject to the reporting requirement under this Rule shall be reported to the Board at the next regular business meeting of the Board following approval of the amendment or change triggering the reporting requirement. The report shall include an explanation of the basis for the amendment or change order.~~

END OF DIVISION

RESOLUTION No. 7309

Expenditure Contracts that Exceed $150,000 for Delegation of Authority

RECITAL

Portland Public Schools ("District") Public Contracting Rules PPS-45-0200 ("Authority to Approve District Contracts; Delegation of Authority to Superintendent") requires the Board of Education ("Board") enter into contracts and approve payment for products, materials, supplies, capital outlay, equipment, and services whenever the total amount exceeds $150,000 per contract, excepting settlement or real property agreements. Contracts meeting this criterion are listed below.

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

NEW CONTRACTS

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Admin, Funding Source	Certified Business
JLD-JMD dba CleanDango	5/27/2026 Through 5/26/2027 Option to renew for four additional one-year terms through 5/26/2031	Services S 97885	District-wide gym and stage floor refinishing. Request for Proposals 2026-023	$250,000	T. Odgers Fund: 101 Dept: 5593	No
Glumac	5/27/2026 Through 5/12/2031 Option to renew yearly throughout the completion of the CMGC contract plus the post one-year warranty	Related Services RS 97855	Cleveland High School Modernization Commissioning Services Request for Proposals 2026-028	$521,650	J. Franco Fund: 461 Dept: 5511	No
Oh Planning + Design	5/27/2026 Through 5/26/2029 Option to renew for three additional one-year terms through 5/26/2032	Architectural Services ARCH 97906	Full seismic rehabilitation and roof replacement design at Rose City Park Request for Proposals 2025-038	$3,873,730	T. Odgers Fund: 459, 461 Dept: 5511	WBE
Brandsen Hardwood Floors	5/27/2026 Through 12/31/2027	Construction C 97916	Grant High School Flooring Replacement and Abatement Invitation to Bid 2026-021	$884,343	T. Odgers Fund: 456 Dept: 5511	No

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Admin, Funding Source	Certified Business
Skyward Construction	5/27/2026 Through 12/31/2026	Construction C XXXXX**	Pre-Authorization for Partial Seismic Rehabilitation at Vernon and Winterhaven Schools. Invitation to Bid 2026-027	$2,094,290	T. Odgers Fund: 459 Dept: 5511	No

*A Certified Business is a for-profit business certified as a Minority-Owned Businesses (MBE), Women-Owned Businesses (WBE), Emerging Small Businesses (ESB), and/or Service-Disabled Veteran Businesses (SDV) by the State of Oregon Certification Office for Business Inclusion and Diversity.

** Contracts are in negotiation and not finalized at this time. Staff seeks advanced authorization for these contracts pursuant to the Purchasing & Contracting Delegation of Authority Administrative Directive, 8.50.105-AD, Section X(4): "The District may seek an 'advanced authorization' from the PPS Board of Education for any contract upon the approval of the Director of Purchasing & Contracting. The cost of the contract shall be a 'Not to Exceed' amount. Once the Board has approved it, no further authorization for the contract is required, providing the contract value remains at or below the 'Not to Exceed' amount."

NEW COOPERATIVE PURCHASING AGREEMENTS

No New Cooperative Purchasing Agreements

NEW INTERGOVERNMENTAL AGREEMENTS ("IGAs")

No New Intergovernmental Agreements

AMENDMENTS TO EXISTING CONTRACTS

Contractor	Amendment Term	Contract Type	Description of Services	Amendment Amount; New Contract Amount	Responsible Administrator, Funding Source	Certified Business
Crocus, LLC	5/27/2026 Through 3/30/2027	Digital Resources DR 96430 Amendment 1	Amendment continues Wallace Grant-Funded data work, building from original EducatorView project into the next phase of the Leader and School Support Dashboard System. Cooperative Agreement EQ-111519-06A	$275,736 $365,016	K. Howard Fund: 299 Dept: 5449	No

RESOLUTION No. 7310

Revenue Contracts that Exceed $150,000 for Delegation of Authority

RECITAL

Portland Public Schools ("District") Public Contracting Rules PPS-45-0200 ("Authority to Approve District Contracts; Delegation of Authority to Superintendent") requires the Board of Education ("Board") enter into contracts, except as otherwise expressly authorized. Contracts exceeding $150,000 per contractor are listed below.

RESOLUTION

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

NEW REVENUE CONTRACTS

No new Revenue Contracts

NEW INTERGOVERNMENTAL AGREEMENTS ("IGAs")

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Admin, Funding Source
State of Oregon – Oregon Department of Education (ODE)	3/1/2026 Through 9/30/2028	Intergovernmental Agreement / Revenue IGA/R 97930	State Summer Learning Grant	$3,000,000	K. Howard
State of Oregon – Oregon Department of Education (ODE) – Infrastructure Finance Authority	5/27/2026 Through 12/31/2027	Intergovernmental Agreement / Revenue IGA/R 97908	Oregon School Capital Improvement Matching (OSCIM) Grant	$12,000,000	J. Franco

AMENDMENTS TO EXISTING CONTRACTS

No New Amendments to Existing Revenue Contracts

To: PPS Board of Education
From: Director Patte Sullivan, Audit Committee Chair

Audit Committee Report for Thursday May 7th

Our first item on the agenda was a discussion of the annual bond performance audit. Our contracted audit team from Sjoberg Evashenk Consulting (SEC) was able to join the meeting to give us the current status on the Year 7 bond performance audit that is currently underway. The auditors reported they anticipate the completed Year 7 report will likely be ready to present in late June or early July this year. As of now, the Audit Committee does not have any meeting scheduled over the summer. The Office of Internal Auditor has been communicating with SEC about the potential need for a July meeting since October 2025. Hopefully, there will be movement on this soon. Be on the lookout in the next months about scheduling a future meeting.

We discussed the outstanding bond performance audit recommendations. In the October 2025 Audit Committee meeting, the Committee discussed referring the outstanding bond audit recommendations to some of the other committees for follow up. The idea was to reduce the number of committees that the OSM (now RISE) team need to report to. The discussion was to check in on the progress that has taken place since then, and to consider whether referring outstanding bond audit recommendations to a different committee for follow up is something that is working effectively or not. The Audit Committee decided that we want to get the results of the Year 7 bond performance audit before determining whether to refer the recommendations to another committee for follow up, or to follow up in the Audit Committee. With that in mind, we decided to discuss it again in our first meeting in the 2026-2027 school year before deciding on next steps. Director LaForte attended the meeting and discussed the progress she has made following up on the outstanding bond audit recommendations that were referred to the Facilities Improvement and Oversight Committee that she chairs. Director LaForte, thank you very much for coming up with a process for following up on those recommendations in your committee, and for attending the Audit Committee to talk about how that has been going for you.

We discussed the RFP process for the bond auditor's contract. Audit Committee members served on the selection panel for the financial statement auditor's contract, and we plan to participate on the selection panel for the bond auditor's contract. We anticipate the RFP process will take place over the summer, and I will provide the Board with additional information on this process as it gets closer.

Next on the agenda we discussed the status of the implementation of the Student Body Funds audit recommendations. We were happy to hear about the progress that has been made on those recommendations. Our internal auditor stated that she would

review the evidence provided related to the outstanding recommendations to confirm the implementation in the next week or so.

The Audit Committee also had an opportunity to reflect on the committee's work so far over the course of the 2025-2026 school year and provide our internal auditor with input on things that have worked well this year and things that could be better in the future. For the most part, the committee seemed quite pleased with our progress. We really liked scheduling a hold for monthly meetings and canceling them when we do not have enough content to warrant a meeting that month. We hope to continue that practice next year.

Our internal auditor also had a chance to share with the committee some proposed updates to the District's Performance Auditing Policy that will help support the work of the Office of Internal Performance Audit. It was the plan to review and approve the proposed policy updates in the Audit Committee and refer the proposed policy update to the Policy Committee for further review and eventual referral to the full Board for approval. When Janise and I built out the Audit Committee's meeting agendas for this year, we did not know that the Board was planning to have a retreat 2 days before the Audit Committee meeting. We did not know that at the retreat the Board would have an opportunity to talk about a process for updating all of the 1,000 series policies, and that the District's Performance Audit Policy is within that 1,000 series of policies. Our internal auditor was quite excited about how well timed the Board's retreat was because it lays a great foundation for updating the 1,000 series of policies which includes the District's audit policy. As a result, our internal auditor gave us a brief overview of what she has been working on. She suggested that she do a presentation in the next Audit Committee meeting that will tie the proposed updates in the policy to the values the Board discussed in the Board Retreat. We hope to refer that policy out of the Audit Committee to the policy committee for further review and eventual referral to the full Board for approval.

The Audit Committee welcomes two community members as ex-officio members on the Audit Committee. Both of our community members' current terms expire at the end of next month, June 30, 2026. I reached out to the community members over the last few months to ask if they would like to stay on the Audit Committee for another term. I am happy to report that both community members welcome reappointment to the Audit Committee. As a result, the Audit Committee has referred those two community members to the full Board for reappointment. We discussed potentially staggering their terms. I will be working with the Board office to get those two community members on a future Board agenda for us to reappoint before the end of June.

We also noted that our Student Rep to the Audit Committee is a junior this year and is hoping to be reappointed to the Audit Committee next year. The Student Rep to the full Board is typically responsible for assigning students to different committees each year, so it cannot be official until next year. The Audit Committee would be happy to welcome

our current student rep back next year if possible. Our current policy states the committee will welcome up to two students to join the Audit Committee as ex-officio members of the committee; so, if there is another student who is really interested in serving on the audit Committee next year, we would be open to the student rep referring the Audit Committee two students next year.

Lastly our internal auditor provided the Audit Committee with a status update on the Office of Internal Performance Audit's activities.

Approved Audits

Measure 98 Audit – Anticipating that we will present this report in the June 2026 Audit Committee Meeting.

Building Security Audit – Currently in the planning phase with the anticipation of presentation to the Audit Committee in the Fall of 2016.

CTE Audit – Scope is being updated to reflect current activities and risks. Anticipate updated scope for review in the Fall of 2026 with audit presented to the Audit Committee in the 2026-27 Winter.

We anticipate these already approved audits will roll over into the 2026-27 school year.

Future Audit Topics

In the October, 2025 Audit Committee Meeting, we discussed a list of future audit topic ideas and narrowed the list to three:

Teacher Absences and Sub Protocols

Student Performance Measures

Support System for Principals

Information is being gathered around these three audit topics and a proposed scope of work related to each topic will be brought to the Audit Committee for consideration in the Fall/Winter of 2026. Two will be chosen and brought to the full Board for approval.

We need to cancel and reschedule the Audit Committee's June 18th meeting. I will be reaching out to find a date that will work for us all.