SWEET HOME SCHOOL DISTRICT #55
Sweet Home, Oregon

SCHOOL BOARD MEETING AGENDA

To view live board meeting please visit the Sweet Home District website: sweethome.k12.or.us and click YouTube link

District Office Conference Room — February 9, 2026, 6:30 p.m.

1. Call the meeting to order/pledge — M. Adams — Action
2. ESPY Awards
3. Public Comment
4. Agenda approval/changes — M. Adams — Action
5. Student & Personnel Reports/Comments
   A. Certified & Classified Representatives — Presidents
   B. Student Report
   C. Superintendent's Report — T. Martin — Information
      1. Enrollment/Attendance Update
      2. LBL ESD Visit - Nancy Griffin
      3. Principal Report-Strategic Plan Progress
         A. Pillar 1 - Safe & Engaging Schools - Bully Report
         B. Pillar 2 - Thriving Students & Prepared Citizens -Nate Tyler, Principal, Jr. High
         C. Pillar 3 - Academic Success for All
         D. Pillar 4 - Connected School Community
6. Consent Agenda — M. Adams — ALL Action
   A. Approve minutes from the January 12, 2026 School Board Meeting
   B. Accept Retirement from Brain Brian Brands, Director of Student Services Director effective February 27, 2026 contingent on being rehired back March 1, 2026 under a post retirement agreement
   C. Accept resignation of Marissa Russell, 5th Grade Teacher at Foster Elementary effective at the conclusion of the 2025/26 academic year
   D. Approve temporary hire of Lisa Leatham, Assistant Principal at the High School for the remainder of the 2025-26 school year.
7. Information/Discussion — ALL Information
   A. Audit Report — K. Strong/Brian Thompson
   B. Budget Update — K. Strong
   C. Board Requested Spending Report — K. Strong
   D. Board Requested PERS Rate Update — K. Strong
   E. Board Policies - 1st reading
      JFCEB-AR - Personal Electronic Devices and Social Media - DELETE this version
      JFCEB-AR - Personal Electronic Devices and Social Media - NEW version
8. Action Items — M. Adams — Action
   A. Approve Proposed 2026-2027 School Calendar
   B. Resolution #2526-3 - May 2026 Bond Elections
9. Board Comments — Information
10. Executive Session
    A. ORS 192.660 (2) (d)- Licensed Bargaining
    B. ORS 192.660-(2) (i) - Superintendent Evaluation
11. Return to regular session
12. Action
    A. Approve Superintendent's Evaluation
13. Late Items
14. Future Agenda Items — M. Adams — ALL
    A. February 16, 2026- No School Presidents Day
    B. March 2, 2026 - Board Officers Meeting - 3:30 in the Superintendents Office
    C. March 9, 2026 - Board Worksession - 3:00 - 6:00pm/ Board Meeting, 6:30 in the Board Room
15. Adjournment — M. Adams — Action

February 9, 2026

Baylee Kimball		High School
Trenton Templin		High School
Ava Desmond		Jr. High
Scott Westfall		Jr. High
Brandan Neal		Foster
Brody Neal		Foster
Kycen Visser		Hawthorne
Brynlee Thedford		Hawthorne
Heston Haigh		Holley
Andee Hoffman		Holley
Hazel Larsen		Oak Heights
Ava McConnell		Oak Heights
Chloe Lawson		Charter
Owen Barnes		Charter

SWEET HOME SCHOOL DISTRICT ENROLLMENT
1/30/2026

															Last Month	Previous Years		
	K	*1*	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	**1/31/26**	12/31/2025	1/31/25	1/31/24	1/31/23
FO	21	37	29	43	44	45	50							**269**	271	276	330	320
HW	36	37	30	51	42	30	44							**270**	273	261	304	285
HO	17	18	16	27	26	23	28							**155**	154	158	173	145
OH	30	29	50	39	47	38	48							**281**	277	303	325	313
CH	22	19	22	22	19	20	22							**146**	148	143	133	129
JH								159	180					**339**	344	351	378	348
HS										173	192	172	165	**702**	713	690	682	688
														2162				
TOTAL	**126**	**140**	**147**	**182**	**178**	**156**	**192**	**159**	**180**	**173**	**192**	**172**	**165**	**2162**	2180	2182	**2325**	**2228**
Grade	***K***	***1***	***2***	***3***	***4***	***5***	***6***	***7***	***8***	***9***	***10***	***11***	***12***					

5C1

SWEET HOME SCHOOL DISTRICT NO. 55
Sweet Home, Oregon

6A

Board Vice Chairman Dale Keene called the **Regular meeting** of the board of Directors of Sweet Home School District No. 55 to order at 6:30 p.m. January 12, 2026.

Board Members in Attendance

Mike Adams, Dale Keene, Jenna Northern, Amanda Carter (ZOOM), Rachel Maynard, Dustin Nichol, Chris Hiaasen, Robert Webster, Mary Speck: Absent:

Staff Members in Attendance

Superintendent: Terry Martin; Administrators/Supervisors: Kevin Strong, Josh Darwood, Barbi Riggs, Darel Bidwell, Ralph Brown, Josh Dargis, Nate Tyler, Luke Augsburger Certified: Steve Thorpe, Tomas Rosa; Classified: Michelle Bidwell, Sam Nothiger; Board Recording Secretary: Julie Emmert

Other Attendance: Scott Swanson, New Era, ESPY parents and Grandparents, Chelsie Augsburger

1. Called the meeting to order/pledge -ESPY Students led pledge

2. ESPY Awards- This award is given to students who are doing well academically and have an exceptionally positive attitude about school. They demonstrate respect and responsibility towards staff and their peers. They show courage by not conforming to Peer pressure and refuse to accept anyone who bullies. The School Board and the District want to recognize these students by celebrating their success at the beginning of each Board Meeting. Students received a Certificate, met each of our Board members and their names were announced on the web.

Student Report- Jr. High Students - Timber J. - Sierra J. & Aubree H. Shared updates on winter sports. Grades and Achievements. Afterschool programs. Shared what the leadership at the Jr. High's duties and responsibilities are. Four students are on the leadership team.

3. Luke Augsburger thanked the Sweet Home School District for his 18 years of service as a teacher and administrator. He raised questions regarding the travel budget, noting a significant increase from $2,500 in 2021 to $46,000 and asked for clarification on the reason for the increase.Business Manager Kevin Strong indicated he would look into the matter and follow up with Mr. Augsburger.

4. Agenda approval/changes
   Chairman called for changes and/or approval of the agenda

***Motion No. 26-1*: Board Member Jenna Northern moved to approve the agenda as amended. Board Member Dale Keene seconded the motion. The motion passed unanimously**

Robert Webster- yes
Chris Hiaasen -yes
Rachel Maynard- yes
Amanda Carter- yes
Mike Adams- yes
Dale Keene - yes
Jenna Northern- yes
Mary Speck - yes
Dustin Nichol -yes

5. Student & Personnel Reports/Comments
   A. Certified & Classified Representatives - Steve Thorpe provided a wrestling report and thanked Luke Augsburger for his years of service to the district as a teacher and administrator. He also expressed support for designating the first day back from Christmas break as a teacher workday with students.

B. C. Superintendent's Report

1. Enrollment/Attendance Update: Hawthorne won again this month. Enrollment stayed about the same as last month.
2. Strategic Plan Progress

6A

A. *Pillar 1 - Safe & Engaging Schools - Bully Report- Superintendent Martin went over the bullying report from December*

B. *Pillar 2 - Thriving Students & Prepared Citizens - Tomas Rosa, HS Leadership-Shared who participated from the 2024-25 school year in the Lecture Series and the 2025-26 that have signed up so far. All of these volunteers share how they started volunteering and then turn that into a profession. Connecting with the community. There are 40 students total.*

C. *Pillar 3 - Academic Success for All - Update increase connectivity as below*

D. *Pillar 4 - New Phone system installed - Gave an update and thanked the Technology team for what they have done.*

6. Consent Agenda
   A. Approved minutes from the December 15, 2025 School Board Meeting
   B. Accept Resignation from Luke Augsburger, High School Asst. Principal effective February 4, 2026

***Motion No. 26-2*: Board Member Dale Keene moved to approve the consent agenda. Board Member Jenna Northern seconded the motion. The motion passed unanimously**

Robert Webster- yes
Chris Hiaasen -yes
Rachel Maynard- yes
Amanda Carter- yes-
Mike Adams- yes
Dale Keene - yes
Jenna Northern- yes
Mary Speck - yes
Dustin Nichol -yes

7. Information/Discussion
   A. Budget Update-Kevin Strong gave the budget report- year to date spending - explained that the bulk of our budget happens at the end of the school year. Mary Speck asked if we could get a report on travel expenses Mr. Augsburger asked about it in Public Comment.
   B. Proposed Calendar for 2026-2027- Information only, has gone to both unions. This calendar mirrors last year and includes all the guidelines. Steve Thorpe had mentioned the day after Christmas break.

8. Action Items
   A. RESOLUTION 2526-2- Approve the 2026-2027 LBL ESD Local Service Plan

Superintendent Martin gave information on the Local Service Plan

***Motion No. 26-3*: Board Member Jenna Northern moved to approve the 2026-2027 SIA LBL ESD Local Service Plan Board Member Mary Speck seconded the motion. The motion passed unanimously**

Robert Webster- yes
Chris Hiaasen -yes
Rachel Maynard- yes
Amanda Carter- yes

Mike Adams- yes
Dale Keene - yes
Jenna Northern- yes
Mary Speck - yes
Dustin Nichol -yes

6A

B. Approve Contract with Questivity to purchase equipment for a complete network hardware refresh

Sam Nothiger gave information to the board regarding this purchase. We have financially planned for this.

***Motion No. 26-4:* Board Member Dale Kenne moved to approve Contract with Questivity to purchase equipment for a complete network hardware refresh Board Member Mary Speck seconded the motion. The motion passed unanimously**

Robert Webster- yes
Chris Hiaasen -yes
Rachel Maynard- yes
Amanda Carter- yes
Mike Adams- yes
Dale Keene - yes
Jenna Northern- yes
Mary Speck - yes
Dustin Nichol -yes

C. Approve Contract with FatBeam Fiber to provide internet service to Foster, Hawthorne, Holley, and Oak Heights Elementary Schools

Sam Nothiger gave information to the board regarding this purchase. We have financially planned for this.

***Motion No. 26-5:* Board Member Jenna Northern moved to approve the Contract with FatBeam Fiber to provide internet service to Foster, Hawthorne, Holley, and Oak Heights Elementary Schools Board Member Dale Keene seconded the motion. The motion passed unanimously**

Robert Webster- yes
Chris Hiaasen -yes
Rachel Maynard- yes
Amanda Carter- yes
Mike Adams- yes
Dale Keene - yes
Jenna Northern- yes
Mary Speck - yes
Dustin Nichol -yes

D. Approve Bond Measure Objectives

Superintendent Kevin Strong reviewed the bond measure objectives. He explained that the board will first need to approve the bond measures, followed by approval of a resolution to proceed at the next meeting. Mary Speck requested clarification regarding the purpose of the bond. Mr. Strong provided additional information on the proposed upgrades, noting that the projects would enhance safety, support other facility improvements, and promote a positive learning environment.

***Motion No. 26-6:* Board Member Dale Keene moved to approve the Bond Measure Objectives Board Member Jenna Northern seconded the motion. The motion passed unanimously**

Robert Webster- yes
Chris Hiaasen -yes

Rachel Maynard- yes
Amanda Carter- yes
Mike Adams- yes
Dale Keene - yes
Jenna Northern- yes
Mary Speck - yes
Dustin Nichol -yes

6A

E. Appoint Jason Redick to the Budget Committee Position #7 At Large

***Motion No. 26-7:* Board Member Dale Keene moved to appoint Jason Redick to the Budget Committee Position #7 at Large. Board Member Jenna Northern seconded the motion. The motion passed 8-1**

Robert Webster- yes
Chris Hiaasen -yes
Rachel Maynard- yes
Amanda Carter- yes
Mike Adams- yes
Dale Keene - yes
Jenna Northern- yes
Mary Speck - no
Dustin Nichol -yes

9. Board Comments: Board Member Mary Speck shared that she was disappointed with the board's decision to vote down the flag policy. Board Member Rachel Maynard noted that the issue had been discussed previously and stated that teachers are already addressing this matter.

Moved to executive session at 7:44 pm

10. Executive Session
    A. ORS 192.660-(2) (i) - Superintendent Evaluation

Returned to Regular Session at 9:38 pm

12. Late Items

13. Future Agenda Items
    A. January 19, 2026 - No School MLK Day
    B. January 30, 2026 - Grading day
    C. February 2, 2026 - Board Officers Meeting - 3:30 in the Superintendents Office
    D. February 9, 2026 - Board Meeting, 6:30 in the Board Room

14. Adjournment at 9:39 pm

_____

Signature, Board Chairman
Julie Emmert, Board Recording Secretary (This meeting was also recorded and saved supt/board/audio)

6B

RE: Brian Brands- Letter of Retirement (PRA Request)

January 22, 2026

Terry Martin, Superintendent
Sweet Home School District
920 Long Street
Sweet Home, OR 97386

Dear Superintendent Martin,

I am writing to formally announce my retirement from my position as Director of Student Services for the Sweet Home School District, effective March 1, 2026.

Although I will be officially retired, I am interested in continuing to serve in my current role as Director of Student Services, contingent upon School Board approval.

Please let me know how to proceed with this transition and if there are any additional steps I should complete.

Sincerely,

Brian Brands
Director of Student Services
Sweet Home School District

6C

Dear Shelley Nurre,

I am writing to formally notify you of my resignation from my position as 5th Grade Teacher at Foster Elementary, effective at the conclusion of the 2025/2026 academic year.

I appreciate the opportunity to have worked with the students and staff at Foster and value the professional experience I have gained during my time here.

I will continue to fulfill my responsibilities through the end of the school year and will assist with any transition needs as appropriate.

Thank you for your support.

Sincerely,
Marissa Russell

RECEIVED
JAN 09 2026
BY:

7A

Sweet Home SCHOOL DISTRICT

MEMORANDUM

To: Board of Directors

From: Kevin Strong

Subject: Fiscal Year 2025 Financial Statements and Audit Report

Date: January 30, 2026

Please find attached the Fiscal Year 2025 Sweet Home School District financial report and the Student Activity Funds financial report, along with the auditor's communication letter to the Board.

Highlights include:

• The auditors issued an unmodified ("clean") opinion on the District's financial statements, with no reservations.

• District expenditures were within authorized appropriations in all areas.

• The District's General Fund ending fund balance decreased by $249,860 to $6,349,151 as of June 30, 2025. For context, the ending balance represented approximately 20 percent of fiscal year revenues. During 2024–25, the District was funded by the State based on the previous year's (2023–24) enrollment levels, which were higher than 2024–25 enrollment.

• The District's total outstanding debt decreased by $3.6 million during the fiscal year, reflecting a 22.8 percent overall reduction as the District continued to meet its debt service schedule requirements.

• The District's net position reported in the government-wide financial statements increased by $7.1 million. The Statement of Net Position presents the District's assets and liabilities, with the difference reported as net position. Over time, changes in net position can serve as an indicator of whether the District's overall financial condition is improving or deteriorating.

• The District completed a major renovation of Oak Heights Elementary School during the fiscal year. The project was primarily funded through a $2.5 million seismic grant, allowing the District to improve facilities without a corresponding increase in local debt.

• The high school activity fund balance increased by $58,201 during the fiscal year. Several individual activity funds recorded increases, including Cheer, FFA, Golf, and Oregon Jamboree.

• The junior high school activity fund balance increased by $833 during the fiscal year.

Brian Thompson with Pauly Rogers and Company plans to attend the February School Board meeting virtually and will be available to answer any questions from the Board. The District's financial statements are also available online at:
http://sweethome.k12.or.us/departments/business/

YTD GENERAL FUND SPENDING COMPARED TO ADOPTED BUDGET & YTD SPENDING LAST YEAR
BY OBJECT CODE
1/31/2026

OBJECT	DESCRIPTION	2025-26 Adopted Budget	YTD as of 1/31/25	YTD as of 1/31/26	Year-to-Year Increase/ <Decrease>	Spending as a % of budget
0111/0123	Licensed Salaries	7,659,031	2,842,858	2,931,892	89,034	38.3%
0112/0124	Classified Salaries	5,909,997	2,851,422	2,890,038	38,616	48.9%
0113/0114	Administrators/Managers	2,043,201	1,087,942	1,113,167	25,225	54.5%
0121	Substitutes - Licensed	465,000	162,249	166,671	4,422	35.8%
0122	Substitutes - Classified	433,000	268,747	301,538	32,791	69.6%
0132	Overtime	45,000	38,228	46,357	8,129	103.0%
0134/0135	Extra Duty	472,980	251,583	274,288	22,705	58.0%
0210/0213	Public Employees Retirement Sys.	5,038,563	1,658,176	2,005,540	347,364	39.8%
0220	Social Security	1,302,811	555,240	568,269	13,029	43.6%
0231	Worker's Compensation	158,435	53,013	58,516	5,503	36.9%
0232	Unemployment Compensation	255,453	14,451	16,497	2,046	6.5%
0233	Oregon Paid Leave	102,181	45,138	47,285	2,147	46.3%
0240	Contractual Employee Benefits	3,264,500	1,208,774	1,306,189	97,415	40.0%
0241	Tuition Reimbursement - Admin.	10,000	0	0	0	0.0%
0242	Tuition Reimbursement - Certified	20,000	1,775	0	(1,775)	0.0%
0243	Conference/Wrkshp Reimb. - Cert.	10,000	0	0	0	0.0%
0244	Conf./Wrkshp Reimb. - Classif.	2,500	0	0	0	0.0%
0245	District Paid Deferred Comp	17,700	8,516	8,885	369	50.2%
0249	Personal Choice Enroll Fee	2,000	810	810	0	40.5%
0312/0319	Intructional Services	285,000	500	6,442	5,942	2.3%
0321	Cleaning Services	20,000	11,099	8,628	(2,471)	43.1%
0322	Repairs and Maintenance Services	73,110	37,103	35,387	(1,716)	48.4%
0324	Rentals	8,000	747	511	(236)	6.4%
0325	Electricity	408,500	202,357	212,381	10,024	52.0%
0326	Fuel (Heating)	310,000	75,010	74,273	(737)	24.0%
0327	Water and Sewage	259,500	127,453	131,311	3,858	50.6%
0328	Garbage	104,000	59,460	59,565	105	57.3%
033X	Other Transportation	127,850	22,335	56,700	34,365	44.3%
0340	Travel	50,090	43,021	29,785	(13,236)	59.5%
0351/9	Telephone/Data Communications	177,500	73,045	75,631	2,586	42.6%
0353	Postage	25,000	6,757	5,376	(1,381)	21.5%
0354	Advertising/Public Notices	3,500	1,678	1,420	(258)	40.6%
0355	Printing and Binding	43,175	1,770	2,280	510	5.3%
0360	Charter School Payments	1,600,000	818,656	897,169	78,513	56.1%
0374	Other Tuition	165,000	0	150,000	150,000	90.9%
0381	Audit Services	41,000	32,870	30,750	(2,120)	75.0%
0382/0384	Legal & Negotiation Services	22,500	2,837	10,602	7,765	47.1%
0388/0389	Other Non-instructional Prof/Tech	755,000	298,082	283,870	(14,212)	37.6%
0410	Supplies and Materials (incl. bus fuel)	458,646	207,531	189,788	(17,743)	41.4%
0412/413	Supplies Tires & Vehicle Parts	85,000	15,606	28,487	12,881	33.5%
0414	Supplies Custodial	157,500	86,031	90,171	4,140	57.3%
0415	Supplies Maintenance	497,500	189,323	173,613	(15,710)	34.9%
0416	Supplies Grounds	42,000	17,916	18,123	207	43.2%
0417	Supplies Maintenance Vehicles	15,000	4,413	1,887	(2,526)	12.6%
0420	Textbooks	1,970	29,919	0	(29,919)	0.0%
0430	Library Books	17,900	3,736	4,400	664	24.6%
0440	Periodicals	2,405	1,321	159	(1,162)	6.6%
0460	Non-consumable Items	217,210	31,610	26,632	(4,978)	12.3%
0470	Computer Software	105,791	107,733	99,608	(8,125)	94.2%
0480	Computer Hardware	195,795	74,992	89,846	14,854	45.9%
052x/054x	Equipment Acquisition	80,000	32,067	0	(32,067)	0.0%
0640	Dues and Fees	118,080	54,996	39,014	(15,982)	33.0%
0651/5	Liability Insurance & Settlements	172,000	133,447	172,575	39,128	100.3%
0653	Property Insurance Premiums	422,000	338,443	382,660	44,217	90.7%
0711	Transfer to Josai	7,500	0	0	0	0.0%
0712	Transfer to Long Term Maint.	750,000	0	0	0	0.0%
0713	Transfer to PERS Reserve Fund	100,000	0	0	0	0.0%
0715	Transfer to Curriculum/Tech. Fund	250,000	0	0	0	0.0%
		35,387,374	**14,192,786**	**15,124,986**	**932,200**	42.7%

2025-2026 Spending by Function

Function	Budget	Actual	% of Budget
1000 Instruction	18,783,808	7,304,548	**38.9%**
2000 Support	14,996,875	7,539,479	**50.3%**
3000 Community	499,191	280,959	**56.3%**
5200 Transfers	1,107,500	0	**0.0%**
	35,387,374	[illegible]	**42.7%**

7B

7C

Sweet Home SCHOOL DISTRICT

MEMORANDUM

To: Board of Directors

From: Kevin Strong

Subject: Board Requested Spending Report

Date: January 30, 2026

At the January Board meeting, the Board requested a detailed spending report for account 100.2320.340 (Office of the Superintendent – Travel and Professional Development) following public comment from a staff member who raised questions about expenditures in this line item during the 2022-2023, 2023–2024 and 2024-2025 fiscal years.

The attached report details this account's expenditures by fiscal year.

Sweet Home School District
2022-2023 Fiscal Year
Account 100.2320.340 (Office of the Superindent Travel & Professional Dev. Expenses)

2023 Confederation of Oregon School Administrators (COSA) Summer Conference in Eugene
Expenses:

Registration - T. Martin	$99.00
Mileage - T. Martin	$55.00
Lodging (The Graduate Hotel) T.Martin	$195.36
Sub-total	$349.36

Oregon School Personnel Association Fall Conference

Registration - J. Emmert	$349.00
Mileage reimbursement - J. Emmert	$115.00
Meal reimbursement - J. Emmert	$46.00
Lodging - Embassy Suites (Tigard)	$321.36
Meal reimbursement - J. Emmert	$35.75
Sub-total	$867.11

L. Riggs Reimbursments

San Diego State University Professional Development	$3,000.00
Salishan Lodge for April 2022 Oregon Small Schools Association Conference	$778.05
Sub-total	$3,778.05

COSA Law Conference

Mileage reimbursement - T. Martin	$112.05
Holiday Inn Express (Eugene) T. Martin	$340.02
Sub-total	$452.07

Job Fair Expenditures

Western Oregon University Job Fair Registration Fee	$200.00
Oregon Professional Education Job Fair Registration Fee	$1,250.00
University of Oregon Registration Fee	$50.00
Best Western lodging	$145.42
Travel reimbursement - J. Dargis	$194.91
Travel reimbursement - T. Barrett	$125.76
Travel reimbursement - M. Snyder	$171.96
Sub-total	$2,138.05

Superintendents' Meeting - Lincoln City

Mileage Reimbursement - T. Martin	$102.50
Salishan Lodging - T. Martin	$522.95
Sub-total	$625.45

Oregon School Personnel Association Spring Conference

Registration for J. Emmert and B. Riggs	$698.00
Mileage reimbursement - J. Emmert	$140.83
Sub-total	$838.83

2023 COSA Summer Conference Expenses

B. Brands	$325.00
T. Barrett	$325.00
B. Riggs	$325.00
L. Augsburger	$325.00
J. Dargis	$325.00
M. Looney	$325.00
D. Perry	$325.00
T. Martin	$325.00
Best Western hotel deposit	$535.50
D. Perry travel reimbursement	$213.53
A. Huff travel reimbursement	$278.22
J. Emmert travel reimbursement	$241.70
T. Barrett travel reimbursement	$232.20
M. Looney travel reimbursement	$158.51
L. Augsburger travel reimbursement	$216.15
Sub-total	$4,475.81

Carnegie Foundation Summit on Improvement in Education

Southwest Airlines - T. Martin	$289.58
Baggage Fees	$120.00
Cab Fees	$55.95
Uber Fees	$93.76
Eugene Airport Parking Fees	$94.00
Meal reimbursements	$188.92
Sub-total	$842.21

Oregon School Boards Association Workshop - May 2023

Meal reimbursement - Riverhouse - J.Emmert	$55.00
Meal reimbursement - Sisters Saloon - J. Emmert	$45.00
Meal reimbursement - Riverhouse - J.Emmert	$52.00
Meal reimbursement - Belgian Restaurant - J.Emmert	$21.60
Meal reimbursement - McKay Cottage - J.Emmert	$34.00
Riverhouse Lodging - J. Emmert	$490.14
Registration - J. Emmert	$170.00
Sub-total	$867.74

Other

Deposit to nutrition program to buy lunches for guests visiting schools	$100.00
Casa de Reyes Sweet Home to discuss curriculum	$111.95

Franczek PC for Tilte IX webinars subscription for staff training	$700.00
Serrantos Sweet Home to discuss curriculum adoption	$105.00
Mileage reimursement for Safe Schools meeting - T. Martin	$56.25
Mileage riembursement - T. Martin	$57.64
Mileage reimbursement to superintendents' meeting - T. Martin	$38.13
Mileage reimbursement to Albany for VCSA meeting - T. Martin	$37.50
Mileage reimbursements to Albany and to COSA for a superintendent mtg. - T. Martin	$212.40
Mileage reimbursement for meeting - T. Martin	$66.16
Mileage reimbursement - PACE insurance training - T. Martin	$206.33
Mileage reimb. for VCSA mtg. and to get BBQ for student/staff appreciation events	$121.83
SHSD Nutrition Services for providing food for in-service staff prof. development training	$1,291.00
Sub-total	$3,104.19

TOTAL EXPENDITURES	**$18,338.87**

Sweet Home School District
2023-2024 Fiscal Year
Account 100.2320.340 (Office of the Superindent Travel & Professional Dev. Expenses)

2023 Confederation of Oregon School Administrators (COSA) Annual Conference in Seaside, Oregon
Expenses:

Best Western Seaside (Lodging for Terry Martin, Barbi Riggs, Brian Brands, Luke Augsburger, Mark Looney, Todd Barrett, Josh Dargis, Amanda Gavette, Darrin Perry, Julie Emmert and Michelle Bidwell plus conference room rental fee for district meetings)	$12,391.95
Safeway food for COSA Conference	$165.34
Walmart food for COSA Conference	$128.30
Camp 18 Restaurant - Lunches on way to COSA Conference	$389.75
Best Western Seaside - firewood	$50.00
Twisted Fish Steakhouse - COSA Conference	$263.75
Doogers Seafood & Grill - COSA Conference	$54.00
T. Martin mileage to/from COSA Conference	$217.46
Sub-total	$13,660.55

August 2023 COSA Meeting

T. Martin mileage and meal reimbursement to August 2023 COSA meeting	$65.95
Candewood Suites - Eugene - August COSA Conference	$203.91
Sub-total	$269.86

2023 Oregon School Personnel Association Fall Summit Expenses:
J. Emmert, B. Riggs & A. Hill attended

OSPA Fall Summit Registration Fee	$349.00
J. Emmert mileage to/from OSPA Conference	$132.05
Meals at Cascadia Restaurant	$24.00
Meals/food from Cheesecake Factory	$110.00
Meals at Hops N Drops	$36.68
Sub-total	$651.73

Valley Coast Superintendent's Association Fall Meeting

Hallmark Newport Lodging for T. Martin	$488.27
T. Martin mileage to/from meeting in Newport	$131.00
Sub-total	$619.27

COSA Law Conference - November 2023

Holiday Inn Express Lodging for T. Martin	$432.97
Buffalo Wild Wings	$36.00
Sub-total	$468.97

COSA Winter Conference at Salishan

T. Martin mileage to/from Salishan	$134.00

T. Martin meals	$75.78
Salishan Lodging	$533.43
Sub-total	$743.21

Texas Computer Education Association (TCEA) Conference

TCEA advances technology in teaching and learning T. Martin attended the conference

T. Martin mileage reimbursement to/from airport	$142.04
Texas Computer Education Association Conference Registration	$349.00
Alaska Airlines - airline tickes to/from Austin, Texas	$591.10
Allianz - travel insurance	$36.94
Embassy Suites, Austin	$814.21
Alaska Air baggage charge	$45.00
Spothero (parking fees)	$64.20
Pappadeaux Seafood Kitchen	$38.00
Hilton Austin Taco Project restaurant	$24.00
Lanier Parking	$35.00
Enterprise Car Rental	$518.87
Quick Trip fuel for vehicle rental	$58.00
Alaska Air baggage charge	$40.00
Sub-total	$2,756.36

Portland, Oregon Educator Job Fair Expenses

Brian Brands, Barbi Riggs, Julie Emmert, Josh Dargis, Amanda Hill, Michelle Snyder, Sebastian Allison attended the job fair on behalf of the school district

J. Dargis mileage reimbursment	214.57
J. Emmert mileage reimbursement	153.06
S. Allison mileage reimbursement	145.32
Metropolitan job fair dinner	$83.00
Dennys job fair breakfasts	$116.77
Sub-total	$712.72

2024 Oregon School Personnel Association Conference

Registration	$349.00
J. Emmert Meal Reimbursement	$19.50
J. Emmert Mileage Reimbursement	$162.14
Black Rabbit Restaurant meals	$55.50
Power Station meals	$48.25
Black Rabbit Restaurant meals	$39.00
Edgefield Lodge - lodging (J. Emmert and B. Riggs shared a room to reduce expense)	$398.83
Sub-total	$1,072.22

2024 COSA Summer Conference

T. Martin Registration	$355.00
B. Brands Registration	$355.00

B. Riggs Registration	$355.00
R. Brown Registration	$355.00
A. Huff Registration	$355.00
N. Tyler Registrration	$355.00
A. Gavette Registration	$355.00
D. Perry Registratin	$355.00
T. Barrett Registration	$355.00
M. Looney Registration	$355.00
J. Dargis Registration	$355.00
Seaside house rental for R. Brown, A. Huff, N. Tyler & A. Gavette	$4,058.89
J. Emmert reimbursement for meals and supplies for COSA conference	$1,014.58
Best Western Seaside - lodging for staff not staying at house rental	$9,182.25
Sub-total	$18,160.72

Other Expenses

COSA Superintendent's Academy Professional Development Registration for T. Martin	$795.00
The Hungerford Law Firm Registration for monthly education legal webinars for district staff	$950.00
August 28, 2023 districtwide inservice lunch catered by Angela Tack Food Services	$4,810.00
Safeway - soft drinks for professional development training	$56.64
11/19/23 Charge- Lunch at Casa De Reyes for T. Martin, B. Riggs and prof. development speaker	$61.60
11/19/23 Charge - Bigfoot Grill -- food for admin. meeting	$308.75
11/19/23 Charge - Walmart -- food for admin. meeting	$50.55
12/15/23 T. Martin mileage reimbursement to Albany ESD for Early Literacy meeting	$37.34
12/15/23 T. Martin lunch with staff at Bigfoot Grille returning from Early Literacy meeting	$60.00
3/18/24 T. Martin mileage reimbursement to Albany for meeting	$40.20
3/19/24 Safeway - Food for counselors' appreciation lunch	$139.79
5/15/24 Safeway food for staff lunch	$84.35
5/15/24 T.Martin BBQ supplies	$29.07
Sub-total	$7,423.29

TOTAL EXPENDITURES	**$46,538.90**

Sweet Home School District
2024-2025 Fiscal Year
Account 100.2320.340 (Office of the Superindent Travel & Professional Dev. Expenses)

Law Webinar Subscription (Professional Development for Staff) for 2024-2025 School Year	
Subscription payment to Hungerford Law Firm	$1,100.00
Sub-total	$1,100.00
2024 Law Conference - Eugene	
T. Martin registration	$350.00
Sub-total	$350.00
2024 COSA Seaside Summer Conference	
Staff lunch at Camp 18 Restaurant	$673.24
Sub-total	$673.24
Raptor School Security Conference	
Alaska Airlines airfare	$425.19
Omni lodging	$869.28
Sub-total	$1,294.47
Valley Coast Superintendents Association Fall Meeting at Newport	
Lodging at Best Western Agate Beach	$297.38
Sub-total	$297.38
American Association of School Administrators Conference	
T. Martin registration	$1,150.00
Hilton Lodging	$1,446.96
Budget Car Rental	$571.11
United Baggage Fee	$40.00
T. Martin reimbursement for travel, parking fees, meals	$401.50
Taxi fees	$49.80
Sub-total	$3,659.37
Valley Coast Superintendents Association Spring Meeting at Newport	
T. Martin - Hallmark Lodging	$444.86
T. Martin - Reimbursement for mileage and meals	$169.59
Sub-total	$614.45
Oregon School Personnel Association Conference	
Registration - J. Emmert & B. Riggs	$898.00
J. Emmert mileage reimbursement	$176.40
J. Emmert/B. Riggs Meals	$319.43
Lodging - Edgefield (shared room to save on costs)	$482.02
Sub-total	$1,875.85
2025 COSA Seaside Summer Conference	
Registration - S. Nurre	$375.00

Registration - T. Martin	$375.00
Registration - B. Riggs	$375.00
Registration - B. Brands	$375.00
Registration - L. Leatham (late registration fee)	$475.00
Registration - M. Looney	$375.00
Registration - T. Barrett	$375.00
Registration - J. Dargis	$375.00
Registration - N. Tyler	$375.00
Registration - A. Gavette	$375.00
Registration - R. Brown	$375.00
Registration - A. Huff	$375.00
J. Emmert Reimbursement for food from Costco for COSA Conference	$210.66
Best Western Seaside Lodging and conference room rental	$11,967.30
Sub-total	$16,777.96

Other

T. Martin mileage reimbursement for meetings in Eugene and Newport	$213.88
T. Martin meal and mileage reimbursement	$230.74
T. Martin reimbursement for Costco - food for staff inservice	$104.85
T. Martin reimbursement mileage to/from Albany	$38.84
J. Emmert travel reimbursement	$130.20
Lunch at China Blue (Corvallis) for new staff from the Philippines	$73.63
T. Martin mileage reimbrsement to/from Albany for superintendent meeting	$38.19
T. Martin mileage reimbursement to/from VCSA meeting	$50.92
Sweet Home Alumni Foundation Fundraising Auction Table	$400.00
T. Martin payment to Texas Computer Education Association for AI in Education prof. dev. Training	$149.00
Walmart food for 8/5/24 admin. meeting	$107.23
Safeway food for 8/5/24 admin. meeting	$16.47
Table at Chamber of Commerce banquet	$525.00
OSBA charges for Board Development training	$1,714.07
Sub-total	$3,793.02

TOTAL EXPENDITURES	**$30,435.74**

7D

Sweet Home SCHOOL DISTRICT

MEMORANDUM

To: Board of Directors

From: Kevin Strong

Subject: Board Requested PERS Information

Date: January 30, 2026

At the January Board meeting, the Board requested additional information regarding the substantial increase in employer-paid PERS rates this fiscal year. The attached article from *The Oregon Journalism Project* provides a detailed explanation of why PERS investment returns have underperformed the broader stock market in recent years and how that has contributed to higher employer rates for school districts and other local governments.

Since this article was published, PERS reported a 9.68 percent investment return for 2025, exceeding its assumed rate of 6.90 percent. However, performance varied significantly by asset class: private equity returned 8.26 percent and real estate returned 2.15 percent while public equity returned 21.25 percent.

OPERF	Policy	Target[1]	$ Thousands[2]	Actual	Year-To-Date[3]
TOTAL OPERF Regular Account			$ 101,338,833		**9.68**
OPERF Policy Benchmark					*13.54*
Value Added					**(3.86)**
OPERF Reference Portfolio					*16.43*
Public Equity	22.5-32.5%	27.5%	$ 20,345,047	20.1%	**21.25**
MSCI ACWI IMI Net					*22.06*
Private Equity	15-27.5%	20.0%	$ 25,005,288	24.7%	**8.26**
Russell 3000+300 Bps Qtr Lag					*20.89*
Total Equity	**42.5-52.5%**	**47.5%**	**$ 45,350,335**	**44.8%**	
Fixed Income	**20-30%**	**25.0%**	**$ 23,329,914**	**23.0%**	**7.28**
Oregon Custom Fixed Income Benchmark					*7.30*
Real Estate	**7.5-17.5%**	**12.5%**	**$ 13,531,461**	**13.4%**	**2.15**
Oregon Custom Real Estate Benchmark					*3.19*
Real Assets	**2.5-10.0%**	**7.5%**	**$ 10,758,008**	**10.6%**	**11.38**
CPI +4%					*7.05*
Diversifying Strategies	**2.5-10.0%**	**7.5%**	**$ 5,479,403**	**5.4%**	**10.00**
HFRI FOF: Conservative Index					*8.12*
Opportunity Portfolio	**0-5%**	**0%**	**$ 2,846,052**	**2.8%**	**11.19**
Opportunity Custom Benchmark					*13.54*
Cash w/Overlay	**0-3%**	**0%**	**$ 43,660**	**0.0%**	**4.76**
91 Day Treasury Bill					*4.18*

PERS investment returns place local governments in a bind

By James Neff | The Oregon Journalism Project | August 5, 2025

Earlier this year, Grant School District Superintendent Mark Witty faced a $900,000 hike in what his district needs to pay this coming year to the Oregon Public Employees Retirement Fund.

JJ Collier is the only art teacher in the Grant School District, and just saw her hours reduced.

It was a crippling announcement. The cause of the increase? Lousy investment returns by the state agency empowered to invest public employees' money. And when investment returns are poor, the state has to fund pension obligations by forcing local governments to make up the difference.

"We had to make significant cuts," said Witty, whose small district educates 470 kids in grades K–12. "It's been traumatic for people."

He had to fire a secretary and an administrator. He couldn't replace three teachers who were leaving, including one in special ed, as well as two teacher's aides. He made cuts to high school vocational agriculture, sliced $20,000 from the athletics department, and cut the district's only art teacher to half time.

That art teacher, JJ Collier, has worked at Grant Union, the combined junior and senior high school in John Day, for 19 years. At 68, she still needed more full-time years of credit for retirement. "It's frustrating," she says. "I was angry."

Hard choices like those the Grant County district had to make have played out across the state's 197 school districts as school boards and superintendents look for an estimated $670 million more over two years to pay for the increased pension fund assessments. Money that could pay for about 6,700 beginning teachers.

The pain, of course, goes far beyond school districts. Every public employer from the state of Oregon down to the smallest special district—904 government employers in all—is in materially worse shape this year because of the pension fund's anemic investment returns.

That means fewer teachers, firefighters, nurses and other vital employees.

An OJP investigation of the Oregon Investment Council, interviews with people in and outside of the State Treasury, and an examination of thousands of pages of documents, meeting minutes and

financial data show that those poor returns could have been averted if Oregon had simply invested the funds in accordance with the guidance for which it pays its outside experts handsomely.

For years, that advice has been for the state to put more money in the stock market and less in a form of investment called private equity—a risky kind of financial engineering in which investment managers buy private companies and seek to resell them in seven to 10 years. And while some major state pension funds and university endowments have been reducing their private equity holdings, Oregon has stayed the course.

Results have been dismal.

For the past 10 years, Oregon's investments in private equity yielded returns below its yardstick—the Russell 3000 Index plus 3%. Last year, Oregon's private equity portfolio yielded just 4.1%, far below the Russell 3000 benchmark, which yielded 38.4%.

Rex Kim, the treasury's chief investment officer since 2020, oversees the $100 billion in the pension fund and how it is invested. (Kim's salary—$810,030—makes him the highest-paid state employee.)

He brushes off criticism of the state's private equity portfolio, saying it's myopic. "I'm not a big fan of taking single-period snapshots of performance." He says his team invests for the long term, over decades of market cycles that he says show private equity beats the stock market.

Rick Pope, a retired Portland lawyer who has spent years attending OIC meetings and publishing reports about the fund for Divest Oregon, is blunt. "They have a car crash on their hands, which [his] staff continues to deny as a problem," Pope says.

Treasury staffers, he adds, have "allocated way beyond their policy to private equity, which has damaged [Public Employee Retirement System] returns. They missed the big stock market uptick because the treasury had to sell stock market investments to fund benefits."

Veteran reporter Ted Sickinger recently dug into these topics at *The Oregonian*.

Rightly so. Think of Oregon's pension fund as a savings account on which 415,000 people rely for PERS benefits. Though most Oregonians don't have a public pension, the success of the fund impacts their quality of life and their families' futures.

"We should all care about PERS because this system touches just about every public service in Oregon," says John Tapogna, senior adviser with ECOnorthwest.

Kim's not the only one responsible. The state treasurer, who is Kim's boss, and the other four voting members of the OIC, appointed by the governor for their investment expertise, have presided as Kim and his team have overinvested in private equity.

One of the nation's leading experts on pension fund investing, Richard Ennis, who reviewed Oregon's 10-year performance, recently gave OJP a withering assessment.

"Oregon has underperformed its private equity benchmark by a significant margin," says Ennis, who helped create the field of institutional investment consulting. "They appear to be after the highest-returning asset without respect to risk-return considerations and without regard to their seeming lack of selection skill."

Gov. Tina Kotek and lawmakers have been debating for the past six months whether Oregon schools need more funding or greater accountability for the money they spend. OJP's reporting shows this would be far less of an issue if the state simply invested more wisely.

The Oregon Public Employees Retirement Fund is responsible for paying pensions to 166,000 retirees and 249,000 future retirees. To do that, PERS charges each city, county, school district and public employer 27 cents on top of every payroll dollar—the system's highest rate ever—and gives the money to OPERF to invest. The fund uses investment gains to pay pensioners.

Investment returns—profits on the investments managers make—fuel the system.

The investment decisions treasury investment staff makes, following OIC policy, are crucial. Sometimes stocks are better than bonds. In other years, real estate or private equity might outperform.

Drawing on the expertise of highly paid outside consultants and the council, Kim's team essentially creates a recipe for what percentage of the fund, called a target, to allocate to different asset classes: stocks, bonds, real estate and private equity, all with an eye for growth and stability that looks decades into the future.

But as any cook can tell you, too much of one ingredient and too little of another can ruin the dish.

How the fund got out of whack can be laid at the feet of the Oregon State Treasurer's Office, its chief investment officer, and the Oregon Investment Council, a board of directors, if you will, that includes as voting members the state treasurer and four members who are appointed to the voluntary position by the governor. Understanding how these partners work together is key.

To guide its choices, treasury staff hires outside experts who tap mountains of research and the best investment analysts to formulate an investment strategy—i.e., how much of the portfolio to allocate to the various ingredients.

The state paid one of those consultants, Meketa Investment Group, $1 million in the past year for advice on the best mix.

"Asset allocation is the most important decision the OIC makes," Meketa tells the council in its regular reports.

Records show the treasury has not followed that high-priced advice for years. For instance, Meketa's current target for stocks is 27.5%. But just 18% of Oregon's $100 billion pension fund is currently invested in stocks.

And the stock market has increased in value significantly more than private equity over the past few years (see graph). In other words, OPERF has loaded up on losers and underinvested in winners. As for the private equity investments, they underperformed their benchmarks every year but one over the past decade.

A number of leading pension funds have been moving away from private equity. Last year, the $202 billion Teachers Retirement System of Texas cut its private equity target to 12%, down from 14%. The $41 billion endowment at Yale University quietly decided in April to sell $6 billion in private equity because the funds weren't delivering the outsized returns that Yale had expected. The sale is particularly significant because Yale pioneered private equity investing among university endowments and many others followed its lead.

If the PERS fund had roughly matched the targets that the consultants and OIC members had committed to stocks and private equity, the fund would have earned about $1.4 billion more in 2024. School districts like Grant County's and cash-strapped cities such as Roseburg, Lakeview and Coos Bay would have millions of dollars more to spend on teachers, librarians, firefighters, street maintenance workers and other needed services.

Asked for his reaction to the OJP calculation about the $1.4 billion cost of being out of compliance with its 2024 targets, the state treasurer from 2017 to 2025, Tobias Read, replied:

"What is my reaction to not having a crystal ball that tells you what exactly will happen in markets next year? Or 10 years? If we could buy one of those, I'm sure we would have."

Even current State Treasurer Elizabeth Steiner says changing course is ill-advised. "At Treasury, we invest the $101 billion in the PERS fund based on long-term goals and strategies," Steiner said. "We don't chase one-year market ups and downs." In fact, Kim's team plans to add to its private equity holdings this year by buying about $2 billion more of the underperforming asset class. Steiner supports that decision.

There are several possible reasons Treasurer Steiner, Kim and others are sticking with Oregon's private equity strategy.

First, Oregon has a long history with private equity. In 1978, it became the first public pension fund to invest in the complicated asset, with $10 million in a fledgling firm called Kohlberg Kravis Roberts & Co, which went on to become a giant in the private equity field. Three years later, the Oregon pension fund made a colossal $178 million bet on a $420 million leveraged buyout of Portland's Fred Meyer grocery chain. The gamble paid returns up to a reported 400% years later.

"When I was there, we were really proud of being pioneers in that realm," says Mark Gardiner, a Portland businessman who served on the OIC from 1999 to 2007.

Second, Oregon dug itself a big hole in the 1990s by promising generous benefits to public employees that it couldn't afford. By 2005, it had crawled out of that hole and the system was fully funded, meaning it had enough money in the fund to pay 100% of future liabilities.

But the Great Recession and the accompanying real estate and stock market crash dug a deep new hole. Today, the fund has a $24 billion unfunded liability. Put another way, it has only 77 cents for every dollar it owes to current and future pensioners.

So, like a gambler on a losing streak, treasury staff is making risky bets to try to earn excess returns and reduce the unfunded liability, a phenomenon that studies have noted with underfunded pensions.

A third reason is a culture in which the staff investment professionals believe they know best.

Gardiner, a former chief financial officer for the city of Portland, described a culture in which treasury staff, rather than the appointed council, controlled the agenda.

"The staff and the consultants were always ready to tell you why you couldn't do what you wanted to do," he says. "Yeah, there was always the 'Oh my God, we have to get into this fund.'…If you went back, you'd find situations where we bitched and moaned about it and still voted for it. Sadly, there was a go-along, get-along thing there."

Rukaiyah Adams was chair of the OIC from 2017 to 2020. When she took over, Adams, then chief investment officer at Meyer Memorial Trust, wrote a letter to newly elected State Treasurer Read and the investment council about the risks of too much exposure to private equity.

Industry experts suggested private equity performance was trending downward, she wrote.

"It's not clear whether our historic commitment to private equity will continue to realize a return premium relative to simpler, less costly and more liquid public market alternatives."

At the time, the OIC's target for private equity was 17.5%, but in reality the fund was overweight at 20%. The national average was just 8.5%.

During Adams' term, private equity as a percentage of the pension fund grew further (see graph).

"Managing asset allocation for a fund as large as OPERF is like steering an aircraft carrier — it's hard to change direction or pivot suddenly," Adams says today.

By 2022, under OIC's current chairwoman, Cara Samples of Fulcrum Wealth Management Group, private equity reached 26% of the pension fund and the OIC had raised the private equity target to 20%.

At the OIC's Nov. 2 meeting that year, Kim's staff, along with consultant Meketa, proposed bumping up the target yet again, to 22.5%.

Samples opposed it: Raising the target "to solve the problem of being overallocated, I don't think we need to do that."

Later in the meeting, Michael Langdon, then the treasury's director of private markets, dismissed such concerns: "I could tell you candidly whether it's 20 or 22 it makes no difference to us. We're still going to be executing the same plan."

Samples declined OJP's requests for comment.

At the OIC's Jan. 25, 2023, meeting, the overallotment in private equity came up yet again. CIO Kim told Samples: "I don't think we as an organization are in a rush to get down to 20%. We hope to get there in time, but…we don't want to lose the long-term value of what we're doing in order to get to some 20% artificial number."

If staff considers the treasury's own targets artificial, why even have an allocation plan, asks Divest Oregon's Pope.

"This is a case where the staff just didn't follow the policies set down by the people they're supposed to obey. And it's a case where the policymakers did not, for whatever reason, ride herd on the staff until it looked like the wheels were starting to come off this vehicle."

In rebuttal, Read says he and OIC members talked several times about getting private equity down to its 20% target and that, in October 2024, "the OIC was presented with reduction scenarios that would get the fund to those targets in the next three to four years."

Ten months later, that plan has yet to come up for a vote.

Back in John Day, Superintendent Witty held out some hope for his school district's fortunes even though the town's only surviving lumber mill had been shuttered months earlier. An interested buyer had surfaced, and talks among the state and the feds about $8 million needed to upgrade the mill and rescue its 70 good jobs seemed promising.

But, he recently said, he learned plans had fallen through. That meant that over the next school year or two, the Grant County district would lose perhaps as many as 30 students. Even worse, he expects another 6% increase in PERS costs on top of the lost per-pupil funding.

"That would be another $850,000 to $950,000 for PERS again," Witty says.

And more job cuts, thanks in part to an underperforming pension fund.

Sweet Home School District 55

7E

Code: JFCEB-AR
Adopted: 10/19/09
Revised/Readopted: 1/09/23
Orig. Code: JFCEB-AR

Personal Electronic Devices and Social Media
(Version 1)

See new version

Students may use personal electronic devices on district grounds subject to the following:

1. Personal electronic devices shall not be used in a manner that disrupts the educational process, school programs or activities, or in a manner that violates law, Board policy, administrative regulation or school rules;[1]

2. Unless as authorized in advance by the building principal or designee for health or safety reasons, or in the event of an emergency situation that involves imminent physical danger, devices shall be turned off and operated only before and after the regular school day. Personal electronic devices at the high school may be used during the student's lunch break. They may not be used at any time in the proximity of any class, school activity or event that may be in session or in progress during those times or in accordance with established school or classroom rules;

3. No personal electronic device which allows for a wireless, unfiltered connection to the district's electronic communication system or has the capability to take photographs or record video or audio, shall be used for such purposes while on district property or at district-sponsored events unless as expressly authorized in advance by the principal or designee;

4. The district shall not be responsible for loss, theft or damage to personal electronic devices brought to district property or district-sponsored events;

5. Personal electronic devices must not be displayed in plain view during prohibited times of use;

6. Personal electronic devices may be used as electronic study aids during the school day if provided as a part of a student's individualized education program (IEP), or if permission is received from the student's teacher;

7. The use of personal electronic devices in any way to send or receive messages, data or information that would pose a threat to academic integrity, contribute to or constitute academic dishonesty is strictly prohibited;

---

[1] The taking, disseminating, transferring or sharing of obscene, pornographic or otherwise illegal images or photographs, whether by electronic data transfer or otherwise (commonly called texting, sexting, emailing, etc.) may constitute a crime under state and/or federal law. Any person taking, disseminating, transferring or sharing obscene, pornographic or otherwise illegal images or photographs will be reported to law enforcement and/or other appropriate state or federal agencies.

7E

8. The use of personal electronic devices in any manner that would violate the confidentiality or privacy rights of another individual is strictly prohibited;

9. Students shall comply with any additional school rules as established by the principal and classroom rules as approved by the principal concerning the appropriate use of personal electronic devices;

10. Personal electronic devices used in violation of law, Board policy, administrative regulation or approved school rules will be confiscated, turned in to the school office and returned to the student or parent following parent notification, conference, detention, suspension, expulsion and/or referral to law enforcement officials as appropriate;

11. Students may not access social media websites using district equipment, while on district property or at district-sponsored activities unless the access is approved by a district representative.

DELETE

Sweet Home School District 55

7 E

Code: JFCEB-AR
Revised/Reviewed:

Request for Personal Electronic Devices Exception

A parent or guardian may request an exception to the personal electronic device prohibition by submitting the following form to the principal:

Name of student: _____ Grade: _____

School: _____

If the reason for the request is included in the student's individualized education program, as defined in ORS 343.025 or an education plan developed for the student in accordance with Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. § 794, this form is not required.

This request is:

- ☐ In compliance with the student's medical provider's order for the care and treatment of a medical condition (attach a copy of the order);
- ☐ Accommodate the individual circumstances of the student;
- ☐ Further specific educational outcomes for the student.

Exemption requested (describe the requested possession or use of a personal electronic device to be allowed and reason for the requested exemption):

_____

_____

_____

Duration for requested exemption: _____

Signed: _____ Date: _____

Parent or guardian name: _____

Parent or guardian phone: _____ Email: _____

_____

For Completion by School Administration

Request: ☐ Granted ☐ Denied

Expiration of exemption: _____

Reason for denial: _____

☐ More information needed. Please submit by [date] for reconsideration.

_____

_____

Signed: _____ Date: _____

School administration will consult with a school nurse when appropriate. School administration decisions will be issued and communicated to the parent or guardian within 10 school days of receipt and can be appealed to the superintendent within 10 days of issuance. The superintendent's decision will be final. Denied requests may be resubmitted if circumstances change or after 12 months, whichever is earlier.

7E

Guidelines for exemption consideration:

1. Exemptions should only be approved for legitimate needs of students and their families, not mere convenience;

2. Exemptions should be consistently granted in a non-discriminatory manner;

3. Exemptions should be limited to address the specific need, with limitations communicated to the student regarding other possession and use;

4. Exemptions should only be approved when other communication methods and device availability (school phones, laptops, computers, available internet, etc.) are not adequate for the specific need;

5. Exemptions should be communicated to necessary staff in a way that protects student privacy;

6. Exemptions should minimize disruption to other students, staff and the educational environment.

2026-2027 SHSD Calendar DRAFT 8A

Sweet Home SCHOOL DISTRICT

1ST SEMESTER

	M	T	W	Th	F	Instructional Days	Contract Days
AUGUST							
	3	4	5	6	7	0	0
	10	11	12	13	14	0	0
	17	18	19	20	21	0	0
	24	25	26	27	28	0	0
	31					0	1
SEPTEMBER							
		1	2	3	4		3
	7	8	9	10	11	4	5
	14	15	16	17	18	5	5
	21	22	23	24	25	5	5
	28	29	30			3	3
OCTOBER							
				1	2	2	2
	5	6	7	8	9	4	5
	12	13	14	15	16	5	5
	19	20	21	22	23	3	5
	26	27	28	29	30	5	5
NOVEMBER							
	2	3	4	5	6	5	5
	9	10	11	12	13	4	5
	16	17	18	19	20	5	5
	23	24	25	26	27	2	3
	30					1	1
DECEMBER							
		1	2	3	4	4	4
	7	8	9	10	11	5	5
	14	15	16	17	18	5	5
	21	22	23	24	25	0	1
	28	29	30	31		0	0
JANUARY							
					1	0	1
	4	5	6	7	8	5	5
	11	12	13	14	15	5	5
	18	19	20	21	22	4	4
	25	26	27	28	29	4	5
						85	98

2ND SEMESTER

	M	T	W	Th	F	Instructional Days	Contract Days
FEBRUARY							
	1	2	3	4	5	5	5
	8	9	10	11	12	5	5
	15	16	17	18	19	4	4
	22	23	24	25	26	5	5
MARCH							
	1	2	3	4	5	5	5
	8	9	10	11	12	5	5
	15	16	17	18	19	5	5
	22	23	24	25	26	0	0
	29	30	31			3	3
APRIL							
				1	2	2	2
	5	6	7	8	9	3	5
	12	13	14	15	16	5	5
	19	20	21	22	23	5	5
	26	27	28	29	30	5	5
MAY							
	3	4	5	6	7	5	5
	10	11	12	13	14	5	5
	17	18	19	20	21	5	5
	24	25	26	27	28	5	5
	31					0	1
JUNE							
		1	2	3	4	4	4
	7	8	9	10	11	5	5
	14	15	16	17	18	4	5
	21	22	23	24	25	0	0
	28	29	30			0	0
						90	94
					Total	175	192

- Instructional Days
- Teacher Non-Contract Day
- Teacher In-Service Day (no students)
- Holidays
- Early Release PD Days
- Half Day-Prep/Grading/Conference Prep
- K-12 Conferences (no students)
- End of Semester
- Grading Days
- Graduation (June 11) No School for High School Only
- End of Quarter for JH

SHSD Regular Start/Stop Times

	START	END
Elem:	7:45	2:15
JH:	8:00	3:00
HS:	8:10	3:15

Early Release Times for Wed. Professional Development

Elem:	1:15 AM
JH:	2:00 PM
HS:	2:15 PM

Half Day 10/21, 4/7, 6/17

PD/Last day of school

Elem:	11:15 AM
JH:	12:00 PM
HS:	12:00 PM

This calendar meets or exceeds all requirements of OAR 581-022-1620

Board Approved:

1/6/2026 10:21 AM

8B Resolution 2526-3

Sweet Home SCHOOL DISTRICT

MEMORANDUM

To: Board of Directors

From: Kevin Strong

Subject: Bond Resolution Action Item

Date: February 4, 2026

Please find attached Board Resolution #2526-3, which authorizes a May 19, 2026 election for voters to consider a proposed bond measure.

The resolution and draft ballot title incorporate the five bond guiding objectives approved by the Board at the January 2026 Board meeting. The bond guiding objectives are:

1. **Maintain the current tax rate**
2. **Student safety and security**
3. **Upgrade classrooms and career learning facilities**
4. **Durable, long-lasting schools**
5. **Leverage grants to reduce local costs**

RESOLUTION NO. #2526-3

A RESOLUTION OF SWEET HOME SCHOOL DISTRICT NO. 55, LINN COUNTY, OREGON CALLING A MEASURE ELECTION TO SUBMIT TO THE ELECTORS OF THE DISTRICT THE QUESTION OF CONTRACTING A GENERAL OBLIGATION BONDED INDEBTEDNESS IN AN AGGREGATE PRINCIPAL AMOUNT NOT TO EXCEED $40,000,000 TO FINANCE CAPITAL COSTS; DECLARING INTENT TO REIMBURSE EXPENDITURES; AND RELATED MATTERS.

WHEREAS, the Board of Directors of Sweet Home School District No. 55, Linn County, Oregon, a school district under Oregon Revised Statutes ("ORS") Chapter 332 (the "District"), has conducted a thorough evaluation of its facilities relating to instructional programming, safety and community needs and has determined that a need exists for the District to finance certain capital costs of the District, as described in the Notice of Measure Election attached hereto as Exhibit A and to pay bond issuance costs (collectively, the "Project"); and

WHEREAS, ORS 328.205, as amended (the "Act"), authorizes the District, subject to voter approval, to contract bonded indebtedness to provide funds to finance the costs of the Project and to pay bond issuance costs; and

WHEREAS, in connection with the Project, the District has evaluated the need for and funding of safety improvements in accordance with ORS 332.176; and

WHEREAS, Oregon Laws 2015, Chapter 783 (Senate Bill 447) established an Oregon School Capital Improvement Matching Program (the "OSCIM" Program") which provides matching fund grants to school districts for capital costs of school districts; and

WHEREAS, the OSCIM Program requires matching funds in an amount equal to or exceeding the amount of the grant and such matching funds must be from general obligation bonds approved by the voters of the district; and

WHEREAS, the District has been approved for a $12,252,000 grant from the OSCIM Program contingent upon bond approval at the May 19, 2026 election; and

WHEREAS, the Board has determined that it is in the best interest of the District to place the question of issuing the general obligation bonds on the ballot at the May 19, 2026 election.

NOW, THEREFORE, THE BOARD OF DIRECTORS OF SWEET HOME SCHOOL DISTRICT NO. 55, LINN COUNTY, OREGON RESOLVES AS FOLLOWS:

1. A measure election is hereby called for the purpose of submitting to the electors of the District the question of contracting a general obligation bonded indebtedness in the name of the District in an amount not to exceed $40,000,000 (the "Bonds"). Bond proceeds will be used to finance the Project and pay bond issuance costs. The Bonds shall mature over a period of not more than 30 years from the date of issue and may be issued in one or more series.

2. The measure election hereby called shall be held in the District on May 19, 2026. As authorized by the County Clerk of Linn County, Oregon and the Oregon Secretary of State, the election shall be conducted by mail pursuant to ORS 254.465 and 254.470.

3. The District authorizes the Superintendent or the Business Manager, or their designee, as the authorized representative (the "Authorized Representative") to act on behalf of the District, to submit the final ballot title and explanatory statement, if any, and to take such further action as is necessary or desirable to carry out the intent and purposes herein in compliance with the applicable provisions of law.

4. The Authorized Representative shall cause to be delivered to the Elections Official of Linn County, Oregon, the Notice of Measure Election (the "Notice") in substantially the form attached hereto as Exhibit A, with such changes as are approved and filed by the Authorized Representative as follows:

a. Not later than February 27, 2026 (81 days prior to the election date) for publication of notice by Linn County on Form SEL 805; and

b. Not sooner than after completion of the ballot title challenge process provided in the Secretary of State's Referral Manual and not later than March 19, 2026 (61 days prior to the election date) on Form SEL 803.

5. The Authorized Representative shall cause to be delivered to the Elections Official of Linn County, Oregon, an Explanatory Statement if Linn County prepares a voters' pamphlet for the May 19, 2026 election, which shall be approved and filed by the Authorized Representative at the time of filing Form SEL 803 pursuant to paragraph 4.b. above.

6. The District anticipates incurring expenditures (the "Expenditures") to finance the cost of the Project and hereby declares its official intent to reimburse its general fund with the proceeds of the Bonds for any of the Expenditures incurred by it prior to the issuance of the Bonds, the interest on which is expected to be excluded from gross income under Section 103 of the Internal Revenue Code of 1986, as amended (the "Code").

7. The Board of Directors hereby ratifies, approves and confirms all actions heretofore taken by the District officers and officials in furtherance of the Bonds and the Project authorized herein, including but not limited to the appointment of Piper Sandler & Co. to serve as the underwriter for the Bonds and the retention of Foster Garvey P.C. to serve as Bond Counsel to the District.

[Signatures appear on the following page.]

ADOPTED by the Board of Directors of Sweet Home School District No. 55, Linn County, Oregon, this 9th day of February 2026.

SWEET HOME SCHOOL DISTRICT NO. 55
LINN COUNTY, OREGON

By:_____
Chair

ATTEST:

By:_____
Superintendent

EXHIBIT A

NOTICE OF MEASURE ELECTION
SWEET HOME SCHOOL DISTRICT NO. 55
LINN COUNTY, OREGON

Notice

Name of District	**Name of County or Counties**	**Date of Election**
Sweet Home School District No. 55	Linn	May 19, 2026

Ballot Title

Caption 10 words which reasonably identifies the subject of the measure

Bonds for Safety, Classrooms, Career Training Facilities, Secure $12,252,000 Grant

Question 20 words which plainly phrases the chief purpose of the measure

Shall District issue bonds, estimated to maintain existing bond rate, for safety, classrooms and career training facilities, secure $12,252,000 grant? If the bonds are approved, they will be payable from taxes on property or property ownership that are not subject to the limits of sections 11 and 11b, Article XI of the Oregon Constitution.

Summary 175 words which concisely and impartially summarizes the measure and its major effect

This measure is structured to maintain the existing District bond rate; no tax rate increase is expected with passage.

Approval secures a $12,252,000 State grant, reducing local costs.

Sweet Home School District seeks approval for up to $40 million in general obligation bonds to finance capital costs, including:

• **Improve Safety:** Upgrade safety at every school, including updated emergency communication and lockdown systems.

• **Expand Career Training:** Upgrade vocational and career technical facilities to prepare students for local jobs.

• **Construct Durable, Secure Classrooms:** Replace aging flat-roof high school classroom buildings with durable classrooms designed for Oregon's climate and improve security by consolidating over 40 exterior entrances with direct public access into a single monitored entrance during school hours.

The $12,252,000 grant is contingent on voter approval. Bonds may be issued in multiple series, each maturing within 30 years of issuance. The measure is estimated to maintain the current District bond rate of $1.45 per $1,000 of assessed value. Actual tax rates may vary, depending on final interest rates and changes in assessed value.