

SCHOOL BOARD MEETING AGENDA

To view the live board meeting, please visit the Sweet Home School District website and click the YouTube link: [shsd55or.gov](https://www.youtube.com/watch?v=shsd55or.gov)

District Office Conference RoomAugust 10, 2026, 6:30 p.m.

- | | | |
|--|-----------|-----------------|
| 1. Call the meeting to order/pledge | D. Keene | Action |
| 2. Agenda approval/changes | D. Keene | Action |
| 3. Public Comment | | |
| 4. Personnel Reports/Comments | | |
| A. Superintendent's Report | T. Martin | Information |
| 5. Consent Agenda | D. Keene | ALL Action |
| A. Approve Regular Board and Worksession Minutes from the July 13, 2026 | | |
| B. Approve hire of Kaley Siewert, 4th grade teacher at Oak Heights effective 8/31/26 | | |
| C. Approve hire of Scott Boyer, Science teacher at the High School effective 8/31/26 | | |
| D. Accept Resignation of Maricel Rendado, Special Ed. Opportunity Teacher at Foster Elementary effective August 6, 2026 | | |
| 6. Information/Discussion | | ALL Information |
| A. Budget Report | K. Strong | |
| B. Auditor Letter Regarding Upcoming Audit | K. Strong | |
| C. Board Policies - Second Reading | D. Keene | |
| BBAA – Individual Board Member's Authority and Responsibilities, Delete | | |
| BBAA – Board Member's Authority and Responsibilities, New | | |
| BBE – Vacancies on the Board, (Version 1), Delete | | |
| BBE – Vacancies on the Board, New | | |
| BBE-AR – Board Member Vacancy Application, New | | |
| BCB – Board Officers | | |
| BCE – Board Committees, Delete | | |
| BCE – Board Committees, New | | |
| BCF – Advisory Committees to the Board, Delete | | |
| BD – Board Meetings, Notices and Communications, New | | |
| BD/BDA – Board Meetings, Optional, Delete | | |
| BDD – Board Meeting Procedures, Delete | | |
| BDD – Board Meeting Procedures, Optional, New | | |
| BDDC – Board Meeting Agenda, Optional, Delete | | |
| BDDC – Board Meeting Agenda, New | | |
| BDDG – Minutes of Board Meetings, Delete | | |
| BDDG – Recordings and Minutes of Board Meetings, New | | |
| CBA – Qualifications and Duties of the Superintendent | | |
| CBG – Evaluation of the Superintendent | | |
| CEA - Educational Equity Advisory Committee | | |
| EBB – Integrated Pest Management | | |
| ECAA – Access to Buildings | | |
| GAA – Personnel Definitions | | |
| GBA – Equal Employment Opportunity | | |
| GBN/JBA – Sexual Harassment | | |
| JBA/GBN – Sexual Harassment | | |
| JO-AR- Student Data Suppression Rule | | |
| 7. Action Items | D. Keene | Action |
| A. Resolution #1-2627 - Authorize the District to issue and sell up to \$40 million in voter-approved general obligation bonds to fund student safety improvements, career and technical education facilities, and the replacement of aging high school buildings. The resolution also authorizes the Superintendent or Business | | |

Manager to finalize the bond structure and sale, appoint the necessary financing professionals, and complete the required tax, disclosure, and post-issuance compliance activities.

- B. Resolution #2-2627 - Authorize the Superintendent or Business Manager to execute and deliver the OSCIM grant agreement on behalf of the District, along with any related documents necessary to secure the grant funding.

8. Board Comments		Information
9. Late Items		
10. Future Agenda Items	D. Keene	ALL Information
A. Next Board Officers Meeting - Monday, August 31, 2026 at 3:30pm		
B. Next Board Meeting - Monday, August 10, 2026 at 6:30pm		
C. New Teacher Luncheon - August 25, 2026 at 11:30am- Boardroom at District Office		
D. All Staff Inservice - September 1, 2026 at 7:30- High School Cafeteria		
11. Adjournment	D. Keene	Action

Board Chairman Mike Adams called the **Regular meeting** of the board of Directors of Sweet Home School District No. 55 to order at 6:28 p.m. July 13, 2026.

Board Members in Attendance

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

Staff Members in Attendance

Superintendent: Terry Martin; Administrators/Supervisors: Kevin Strong, Darel Bidwell; Classified; Michelle Bidwell; Board Recording Secretary: Julie Emmert

Other Attendance: Brandon Saveskie, New Era, Luke Augsburg, Chelsey Augsburg, Michelle Knight, Susan Coleman

1. Called the meeting to order at 6:30 pm
2. Elect Board Officers for 2026-2027 ORS 332.040, 332.005(2) BC/BCA M. Adams Action
 Board Chair: Dale Keene
 Vice-Chair 1: Mike Adams
 Vice-Chair 2: Jenna Northern

Board Chair Mike Adams read the organizational information as to how the elect Board Chair Mike Adams explained the organizational meeting procedures and outlined the election process for Board officers.

Board Chair Nominations:

Rachel Maynard by Mary Speck -2

Dale Keene by Jenna Northern - 6

Chris Hiaasen by Rachel Maynard

1 did not count

Board Vice Chair 1 Nominations:

Rachel Maynard by Mary Speck – 2

Mike Adams by Jenna Northern - 7

Board Vice Chair 2 Nominations:

Rachel Maynard by Mary Speck - 3

Jenna Northern by Mike Adams - 6

3. Public Comment: Luke Augsburg addressed the Board regarding items on the July Board agenda. He expressed concerns about proposed revisions to Board Policy **BCB – Board Officers**, specifically the language stating: *"If public comment is a part of the meeting, the Board chair may regulate the order and length of appearances and limit appearances to presentations of relevant points."* Mr. Augsburg stated that he was concerned this language could allow a Board Chair to limit or silence public comment based on whether comments are deemed relevant.

Mr. Augsburg agrees with the updates to board policy BDDG- Recordings and Minutes of Board Meetings but requested that microphones be provided for each Board member to improve audibility during meetings. In addition, he thanked the Board for reducing the Superintendent's travel.

4. Agenda approval/changes

Motion No. 26-40: Board Member Mary Speck moved to approve the agenda as amended. Board Member Mike Adams 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. Personnel Reports/Comments

A. Superintendent's Report

B. Sweet Home Early Literacy Program (Sweet HELP) - Susan Coleman shared the background of the program, How the Reading Buddy Program Works, first year outcomes, and Building for the Future

6. Consent Agenda

- A. Approved minutes from the June 8, 2025 School Board Meeting, June 22, 2026 Special Board Meeting
- B. Designated the Local Government Investment Pool and Key Bank as depositories for the District for 2026-2027 ORS 328.441 DG
- C. Designated Superintendent as Chief Administrative Officer, District Clerk and Hearings Officer for 2026-2027 ORS 332-515
- D. Designated Pauly Rogers as auditors of record for 2026-2027
- E. Designated The Hungerford Law Firm as attorney of record for 2026-2027 DJCA
- F. Authorized cooperative purchasing agreements with other local education agencies, county, state, and federal agencies for 2026-2027
- G. Designated the Business Manager as the Deputy Clerk, custodian of funds and Budget Officer for 2026-2027 ORS 328.441, 328.445, ORS 294.331
- H. Designated Superintendent as the signature authority on all state and federal grants for 2026-2027 ORS 332.525
- I. Designated Brown & Brown as our Insurance Agent of Record for 2025- 2026
- J. Authorized Business Manager & Superintendent to handle District funds for the 2026-2027 fiscal year
- K. Authorized Sweet Home School Board as the Local Public Contract Review Board ORS 279A.060
- L. Approved to extend the award for Food Products and Non-Food Supplies to Sysco for the 2026-2027 school year
- M. Accepted resignation from Amanda Hill, HR & Benefits Specialist effective July 10, 2026
- N. Approved transfer of Lisa Martin to HR & Benefits Specialist position in the Business office effective July 1, 2026
- O. Approved hire of Ryan Adams, Principal at Oak Heights effective August 6, 2026
- P. Accepted resignation from Elias Stuckart, Science Teacher at the High School effective immediately
- Q. Approved hire of Cathy Brands-Hawken, .4 Learning Consultant- Special Ed effective 8/31/2026 on a Post Retirement Agreement
- R. Approved hire of Grainne Tinnelly teacher at Oak Heights Elementary effective 8/31/2026

- S. Approved resignation from Laurel Adams, 4th Grade Teacher at Oak Heights elementary effective 6/12/2026

5A

Motion No. 26-41: Board Member Rachel Maynard moved to approve pull consent items O and Q out for discussion. 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

Motion No. 26-42: Board Member Mike Adams moved to approve the consent agenda without O and Q. 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

Rachel Maynard - Questions regarding hiring spouses, policies and how do we make sure this is being followed.

Motion No. 26-43: Board Member Mike Adams moved to approve O and Q. Board Member Rachel Maynard 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. Board Policies - First Read

BBAA – Individual Board Member’s Authority and Responsibilities, Delete
BBAA – Board Member’s Authority and Responsibilities, New
BBE – Vacancies on the Board, (Version 1), Delete
BBE – Vacancies on the Board, New
BBE-AR – Board Member Vacancy Application, New
BCB – Board Officers
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 GAA – Personnel Definitions
 GBA – Equal Employment Opportunity
 GBN/JBA – Sexual Harassment
 JBA/GBN – Sexual Harassment

B. UPDATED: Bond Update - K. Strong/J. Darwood showed a slide show of the High School draft remodel

8. Action Items

- A. Designate the day, time and location for the official school board meetings for the 2026-2027 school year ORS-322-045BD/BDA

Motion No. 26-44: Board Member Mary Speck moved to continue with the same day, time and location for the official school board meetings for the 2026-2027 school year. Board Member Rachel Maynard 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

- B. Approve the authorization for the Superintendent, Business Manager and Facilities Director to enter into negotiations with GLAS Architects for architectural, engineering, and related professional services associated with the upcoming bond project

Motion No. 26-45: Board Member Rachel Maynard moved to approve authorization for the Superintendent, Business Manager and Facilities Director to enter into negotiations with GLAS Architects for architectural, engineering, and related professional services associated with the upcoming bond project. Board Member Mike Adams 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

5A

9. Board Comments: Mary Speck congratulated the new board officers. Commented that our work session was really good.

10. Late Items

11. Future Agenda Items

- A. Summer Conference- July 16th -9:00-3:30 - Lane Community College, Eugene
- B. Next Board Officers Meeting TBD
- C. Next Board Meeting TBD
- D. New Teacher Luncheon - August 25, 2026 at 11:30- Boardroom at District Office
- E. All Staff Inservice - September 1, 2026 - more details to come

12. Adjournment at 7:40 pm

Signature, Board Chairman

Minutes completed by Julie Emmert, Board Recording Secretary

Board Chairman Mike Adams called the **Work Session** of the board of Directors of Sweet Home School District No. 55 to order at 3:00 p.m. July 13, 2026.

Board Members in Attendance

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

Staff Members in Attendance

Superintendent: Terry Martin; Administrators/Supervisors: Kevin Strong; Classified; Michelle Bidwell; Board Recording Secretary: Julie Emmert

1. Called the meeting to order at 6:30 pm

2. Call the meeting to order

3. Work Session

Presenter: Jennifer Nelson, Oregon School Boards Association (OSBA)

Jennifer Nelson facilitated a Board Governance Work Session titled "**Aligning Priorities, Governance, and Accountability.**" The session focused on governance practices, superintendent goal setting, and the superintendent evaluation process.

Topics discussed included:

- The importance of strong governance through role clarity, shared expectations, effective communication, meaningful goals, and ongoing monitoring.
- A review of the distinct roles and responsibilities of the Board and Superintendent.
 - **Board Responsibilities:** Establishing vision, adopting policy, approving the budget, ensuring accountability, and providing superintendent oversight.
 - **Superintendent Responsibilities:** District operations, personnel, educational programs, recommendations to the Board, and implementation of Board direction.
- Discussion of governance scenarios illustrating the distinction between Board and administrative responsibilities, including:
 - Personnel complaints
 - Student safety concerns
 - Declining student achievement data
- Recognition that many day-to-day issues are administrative in nature and fall under the Superintendent's authority, while the Board's role is to provide oversight and governance.
- Review of the importance of understanding individual versus collective Board authority.
- Discussion regarding effective Board communication practices, including:
 - Reviewing Board packets in advance of meetings.
 - Maintaining professional communication.
 - Participating in ongoing Board development and training.

- Strategies for raising concerns effectively and maintaining productive working relationships.
- The relationship between the District Strategic Plan, Board priorities, Superintendent goals, and the evaluation process.
- The importance of communication, transparency, and the use of student achievement data to monitor district progress.
- Discussion regarding district operations, Board priorities, identifying evidence to measure progress toward goals, and the importance of regular monitoring and evaluation.

No action was taken during the work session.

4. Adjournment at 5:03 pm

Signature, Board Chairman
Julie Emmert, Board Recording Secretary

CANDIDATE NAME: Kaley Siewert

POSITION: 4th Grade Teacher

JOB #: 13-2627

DATE: July 13, 2026

BUILDING: Oak Heights

ADMINISTRATOR: Ryan Adams

Type of Endorsement: _____

Have three reference checks been completed? yes ☐ no ☐

Effective Date: 8/31/2024

Other Information:

[illegible]

7/13/2024
8/10/2024

RECOMMENDATION TO HIRE

CANDIDATE NAME: Scott BayerPOSITION: Science Teacher SHHSJOB #: 30-2627DATE: 7/16/27BUILDING: Sweet Home HSADMINISTRATOR: Arnon Huff

Does this candidate hold a current Oregon License?	yes	☒	no	☐
Does this candidate hold an Out-of-State License?	yes	☐	no	☒
Is this candidate in the process of obtaining an Oregon License?	yes	☐	no	☒

Type of Endorsement: ScienceHave three reference checks been completed? yes ☒ no ☐Effective Date: 26-27 school year

Other Information:

Office use only:

Superintendent review date: _____

Board approval date: _____

August 05, 2026

Terry Martin

Superintendent

Sweet Home School District #55

1920 Long Street, Sweet Home, Oregon

Mr. Terry Martin:

After much thought and consideration, I am formally submitting my resignation from my position as a SPED teacher (Opportunity Room) in Foster Elementary School, effective August 6, 2026.

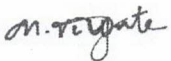
The revocation of my visa came as a complete surprise, as I was not given prior notice during the date of revocation. It was truly difficult and heartbreaking to receive such unexpected news. My sincere desire was to remain in the district and continue serving our students, especially since I had signed my contract for this school year last March with great hope and commitment.

Unfortunately, this situation is beyond my control, and I have no choice but to accept the circumstances. In order to create a graceful and professional transition, I have decided to tender my resignation and move forward.

I want to express my heartfelt gratitude for the opportunity to work in the district. I genuinely appreciate the support, trust, and kindness that I received during my time here. It has been a meaningful experience, and I will always be grateful for the chance to be part of the district.

Thank you once again for everything. I will always treasure the memories and skills obtained from my teaching journey within this institution.

Sincerely,



Maricel Rendado

SPED Teacher

YTD GENERAL FUND SPENDING COMPARED TO ADOPTED BUDGET & YTD SPENDING LAST YEAR

BY OBJECT CODE

7/31/2026

OBJECT	DESCRIPTION	2026-2027	YTD as of 7/31/25	YTD as of 7/31/26	Year-to-Year Increase/ <Decrease>	Spending as a % of budget
		Adopted Budget				
0111/0123	Licensed Salaries	7,659,031	0	1,262	1,262	0.0%
0112/0124	Classified Salaries	5,909,997	198,778	218,433	19,655	3.7%
0113/0114	Administrators/Managers	2,043,201	91,091	92,722	1,631	4.5%
0121	Substitutes - Licensed	465,000	0	0	0	0.0%
0122	Substitutes - Classified	433,000	26,339	19,919	(6,420)	4.6%
0132	Overtime	45,000	1,828	534	(1,294)	1.2%
0134/0135	Extra Duty	472,980	1,315	1,590	275	0.3%
0210/0213	Public Employees Retirement Sys.	5,038,563	88,879	87,168	(1,711)	1.7%
0220	Social Security	1,302,811	29,277	27,082	(2,195)	2.1%
0231	Worker's Compensation	158,435	5,451	4,916	(535)	3.1%
0232	Unemployment Compensation	255,453	764	707	(57)	0.3%
0233	Oregon Paid Leave	102,181	2,372	2,194	(178)	2.1%
0240	Contractual Employee Benefits	3,264,500	46,945	52,518	5,573	1.6%
0241	Tuition Reimbursement - Admin.	10,000	0	0	0	0.0%
0242	Tuition Reimbursement - Certified	20,000	0	0	0	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	680	530	(150)	3.0%
0249	Personal Choice Enroll Fee	2,000	85	0	(85)	0.0%
0312/0319	Instructional Services	285,000	0	0	0	0.0%
0321	Cleaning Services	20,000	0	0	0	0.0%
0322	Repairs and Maintenance Services	73,110	0	139	139	0.2%
0324	Rentals	8,000	0	0	0	0.0%
0325	Electricity	408,500	29,227	27,559	(1,668)	6.7%
0326	Fuel (Heating)	310,000	0	658	658	0.2%
0327	Water and Sewage	259,500	0	0	0	0.0%
0328	Garbage	104,000	8,216	8,601	385	8.3%
033X	Other Transportation	127,850	0	0	0	0.0%
0340	Travel	50,090	728	3,182	2,454	6.4%
0351/9	Telephone/Data Communications	177,500	10,634	10,695	61	6.0%
0353	Postage	25,000	0	0	0	0.0%
0354	Advertising/Public Notices	3,500	0	0	0	0.0%
0355	Printing and Binding	43,175	0	0	0	0.0%
0360	Charter School Payments	1,600,000	217,774	228,309	10,535	14.3%
0374	Other Tuition	165,000	12,900	10,600	(2,300)	6.4%
0381	Audit Services	41,000	0	0	0	0.0%
0382/0384	Legal & Negotiation Services	22,500	637	231	(406)	1.0%
0388/0389	Other Non-instructional Prof/Tech	755,000	36,300	38,342	2,042	5.1%
0410	Supplies and Materials (incl. bus fuel)	458,646	34,883	14,132	(20,751)	3.1%
0412/413	Supplies Tires & Vehicle Parts	85,000	5,488	762	(4,726)	0.9%
0414	Supplies Custodial	157,500	6,718	5,215	(1,503)	3.3%
0415	Supplies Maintenance	497,500	8,474	10,511	2,037	2.1%
0416	Supplies Grounds	42,000	600	1,000	400	2.4%
0417	Supplies Maintenance Vehicles	15,000	0	259	259	1.7%
0420	Textbooks	1,970	0	0	0	0.0%
0430	Library Books	17,900	0	23	23	0.1%
0440	Periodicals	2,405	80	0	(80)	0.0%
0460	Non-consumable Items	217,210	0	0	0	0.0%
0470	Computer Software	105,791	6,458	10,323	3,865	9.8%
0480	Computer Hardware	195,795	600	1,552	952	0.8%
052x/054x	Equipment Acquisition	80,000	0	0	0	0.0%
0640	Dues and Fees	118,080	10,326	15,760	5,434	13.3%
0651/5	Liability Insurance & Settlements	172,000	0	0	0	0.0%
0653	Property Insurance Premiums	422,000	0	0	0	0.0%
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	883,847	897,428	13,581	2.5%

2026-2027 Spending by Function

Function	Budget	Actual	% of Budget
1000 Instruction	19,307,846	44,580	0.2%
2000 Support	15,516,037	808,507	5.2%
3000 Community	570,453	44,341	7.8%
5200 Transfers	1,107,500	0	0.0%
	36,501,836	897,428	2.5%

6A



PAULY, ROGERS, AND CO., P.C.
12700 SW 72nd Ave. ♦ Tigard, OR 97223
(503) 620-2632
www.paulyrogersandcpcpas.com

6B

July 6, 2026

To the Board of Directors,
Sweet Home School District
Linn County, Oregon

We are engaged to audit the financial statements of the governmental activities and each major fund of Sweet Home School District for the year ended June 30, 2026. Professional standards require that we provide you with the following information related to our audit.

Since a two-way dialogue can provide valuable information for the audit process, we have included with this letter a questionnaire for you to complete. We also encourage you to contact us with any questions you may have about the audit process, anything in this letter, or other areas of concern.

Our Responsibility under U.S. Generally Accepted Auditing Standards

As stated in our engagement letter, our responsibility, as described by professional standards, is to express opinions about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles. Our audit of the financial statements does not relieve you or management of your responsibilities.

We have been engaged to report on the supplementary information, which accompanies the financial statements but is not RSI. Our responsibility for this supplementary information, as described by professional standards, is to evaluate the presentation of the supplementary information in relation to the financial statements as a whole and to report on whether the supplementary information is fairly stated, in all material respects, in relation to the financial statements as a whole.

Our responsibility is to plan and perform the audit to obtain reasonable, but not absolute, assurance that the financial statements are free of material misstatement. As part of our audit we will consider the internal control of the entity. Such considerations will be solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control. We are responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures specifically to identify such matters.

Planned Scope, Timing of the Audit, Significant Risks and Other

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested.

Our audit will include obtaining an understanding of the entity and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Material misstatements may result from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. We will generally communicate our significant findings at the conclusion of the audit. However, some matters could be communicated sooner, particularly if significant difficulties are encountered during the audit where assistance is needed to overcome the

difficulties or if the difficulties may lead to a modified opinion. We will also communicate any internal control related matters that are required to be communicated under professional standards.

We have identified the following significant risk(s) of material misstatement as part of our audit planning:

- Risk of management override of controls – during the audit, we review for any signs of management override of controls in all of our testing. There are specific tests in the general audit programs that address the risk of management override of controls.

Roy Rogers is the engagement partner and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it.

Management Representations

Professional standards require that we obtain certain representations from management before we issue our audit report. We will provide you with a copy of the signed management representation letter near the end of the audit process, if you request them.

Additional Requirements

The standards require that the auditors document the adequacy of two-way communication with the governing body. In the wake of well-publicized audit failures and emerging best practices in corporate governance, expectations have increased for auditors to communicate openly and candidly with those charged with governance regarding significant findings and issues related to the audit. We will communicate significant findings from the audit in writing when we believe that oral communication would not be adequate. Additional communications will come from us after we have issued our audit reports.

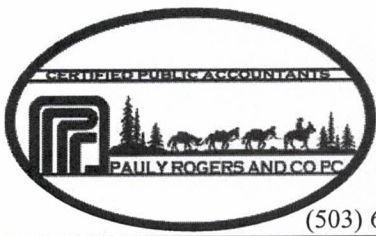
Request for information from Governing Body

In connection with an audit of your financial statements, please furnish answers to the questions on the enclosed "Governing Body Questionnaire" form, and return the questionnaire directly us, Pauly Rogers and Co., P.C., 12700 S.W. 72nd Avenue, Tigard, Oregon, 97223, or send the completed questionnaire to the email address below. The questionnaire is designed to obtain information in conjunction with the audit of Sweet Home School District for the year ended June 30, 2026 in accordance with Professional Standards. **If we do not receive a response from you, we will assume that you have no issues to report to us. Also, if you submitted a questionnaire to us and other items come to your attention, please feel free to send us another questionnaire back before we finish our audit.**

Thank you for your involvement and for completing the questionnaire. We believe audit standards will continue to expand and create additional requirements in years to come.

This information is intended solely for the use of the governing body and management and is not intended to be, and should not be, used by anyone other than these specified parties.

Brian Thompson
Pauly, Rogers and Co., P.C.
12700 SW 72nd Ave.
Tigard, Oregon 97223
BrianT@rascpas.com



**SWEET HOME SCHOOL DISTRICT
GOVERNING BODY QUESTIONNAIRE
FISCAL YEAR ENDING 06/30/2026**

6B

(503) 620-2632

-
1. Do you know of or suspect any fraud in your organization? *If so, please describe your knowledge and concerns.*

 2. Have you received any communications from employees, former employees, volunteers, grantors, contributors, regulators, or others alleging fraud or misconduct?

 3. How do you communicate to the staff that fraudulent and unethical behavior will not be tolerated?

 4. Are you aware of any pending or threatened litigation?

 5. Do you regularly receive financial/operating reports from staff?
 - a. How often?
 - b. Do you review these reports?
 - c. What information do you find most useful in these reports?
 - d. What monitoring do you do to assure yourself that information given to you by your staff does not make things look better or worse than they really are?

6. Is there anything else we need to know to properly plan this audit? Is there any area you are concerned about where you would like us to focus?

6B

The following questions relate to Related Parties. *If the answer to any question below is "yes," please explain in the space provided.*

Related parties include members of the governing body, administrative officials; immediate families of administrative officials, and members of the governing body; and affiliated governmental units not included in the financial statements, such as a metropolitan water and sewer system.

7. Have you or any related party of yours had any material interest, direct or indirect, in any of the following transactions or pending transactions since the beginning of the year under audit to which the entity was, or is to be, a party?

	<u>Yes</u>	<u>No</u>
Sale, purchase, exchange, or leasing of property?	☐	☐
Receiving or furnishings of goods, services, or facilities?	☐	☐
Transfer of receipt of income or assets?	☐	☐
Maintenance of bank balances as compensating balances for the benefit of another?	☐	☐
Other transactions?	☐	☐

8. Have you or any related party of yours been indebted to or had a receivable from the entity at any time since the beginning of the year under audit? Please exclude amounts due for ordinary travel and expense advances.

<u>Yes</u>	<u>No</u>
☐	☐

Name

Date

Sweet Home School District 55

Code: JBA/GBN
Adopted: 11/09/20
Revised/Readopted: 9/12/22; 9/09/24; 8/01/25
Orig. Code: JBA/GBN

Sexual Harassment

The district is committed to eliminating sexual harassment. Sexual harassment will not be tolerated in the district. All students, staff members and other persons are entitled to learn and work in an environment that is free of harassment. All staff members, students and third parties are subject to this policy. Any person may report sexual harassment.

The district processes complaints or reports of sexual harassment under Oregon Revised Statute (ORS) 342.700 et. al. and federal Title IX laws found in Title 34 C.F.R. Part 106. Individual complaints may require both of these procedures, and may involve additional complaint procedures.

General Procedures

When information, a report or complaint regarding sexual harassment is received by the district, the district will review such information, report or complaint to determine which law applies and will follow the appropriate procedures. When the alleged conduct could meet both of the definitions in ORS Chapter 342 and Title IX, both complaint procedures should be processed simultaneously (*see* JBA/GBN-AR(1) - Sexual Harassment Complaint Procedure and JBA/GBN-AR(2) - Federal Law (Title IX) Sexual Harassment Complaint Procedure). The district may also need to use other complaint procedures when the alleged conduct could meet the definitions for other complaint procedures

OREGON DEFINITION AND PROCEDURES

Oregon Definition

Sexual harassment of students, staff members or third parties¹ shall include:

1. A demand or request for sexual favors in exchange for benefits;
2. Unwelcome conduct of a sexual nature that is physical, verbal, or nonverbal and that:
 - a. Interferes with a student's educational activity or program;
 - b. Interferes with a school or district staff member's ability to perform their job; or
 - c. Creates an intimidating, offensive, or hostile environment.

¹: "Third party" means a person who is not a student or a school or district staff member and who is: 1) on or immediately adjacent to school grounds or district property; 2) at a school-sponsored activity or program; or 3) off school grounds or district property if a student or a school or district staff member acts toward the person in a manner that creates a hostile environment for the person while on school or district property, or at a school- or district-sponsored activity.

3. Assault when sexual contact occurs without consent². Sexual harassment does not include conduct that is necessary because of a job duty of a school or district staff member or because of a service required to be provided by a contractor, agent, or volunteer, if the conduct is not the product of sexual intent or a person finding another person, or another person's actions, offensive because of that other person's sexual orientation or gender identity.

Examples of sexual harassment may include, but not be limited to, physical touching or graffiti of a sexual nature; displaying or distributing of sexually explicit drawings; pictures and written materials; sexual gestures or obscene jokes; touching oneself sexually or talking about one's sexual behaviors in front of others; or spreading rumors about or rating other students or others as to appearance, sexual activity or performance.

Oregon Procedures

Reports and complaints of sexual harassment should be made to the following individual(s):

Foster Elementary

Shelley Nurre	Principal	541-367-7810	shelley.nurre@shsd55or.gov
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Hawthorne Elementary

Mark Looney	Principal	541-367-7450	mark.looney@shsd55or.gov
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Holley Elementary

Josh Dargis	Principal	541-367-7510	josh.dargis@shsd55or.gov
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Ryan Adams	Principal	541-367-7411	ryan.adams@shsd55or.gov
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Sweet Home Jr. High School

Nate Tyler	Principal	541-367-7411	nate.tyler@sshsd55or.gov
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Sweet Home High School

Ralph Brown	Principal	541-367-7142	ralph.brown@shsd55or.gov
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Sweet Home Charter School

Monica Isom	Principal	541-367-1833	shcs@piecharter.org
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Administration

Terry Martin	Superintendent	541-367-7637	terry.martin@shsd55or.gov
Brian Brands	Dir. of Student Serv.	541-367-7115	brian.brands@shsd55or.gov

These individual(s) are responsible for accepting and managing complaints of sexual harassment. Persons wishing to report should contact them using the above information. This person is also designated as the Title IX coordinator. See JBA/GBN-AR(1) - Sexual Harassment Complaint Procedure.

² "Without consent" means an act performed: (a) without the knowing, voluntary and clear agreement by all parties to participate in the specific act; or (b) when a person who is a party to the act is incapacitated by drugs or alcohol; unconscious; or pressured through physical force, coercion or explicit or implied threats to participate in the act.

Response

Any staff member who becomes aware of behavior that may violate this policy shall immediately report to a district official. The district official (with coordination involving the reporting staff member when appropriate) will take any action necessary to ensure the:

1. Student is protected and to promote a nonhostile learning environment;
2. Staff member is protected and to promote a nonhostile work environment; or
3. Third party who is subjected to the behavior is protected and to promote a nonhostile environment.

This includes providing resources for support measures to the student, staff member or third party who was subjected to the behavior and taking any actions necessary to remove potential future impact on the student, staff member or third party, but are not retaliatory against the student, staff member or third party being harassed or the person who reported to the district official.

Any student or staff member who feels they are a victim of sexual harassment are encouraged to report their concerns to district officials, this includes officials such as the principal, compliance officer or superintendent. Students may also report concerns to a teacher, counselor or school nurse, who will promptly notify the appropriate district official.

Investigation

All reports and complaints about behavior that may violate this policy shall be investigated. The district may use, but is not limited to, the following means for investigating incidents of possible harassment:

1. Interviews with those involved;
2. Interviews with witnesses;
3. Review of video surveillance;
4. Review of written communications, including electronic communications;
5. Review of any physical evidence; and
6. Use of third-party investigator

The district will use a reasonable person standard when determining whether a hostile environment exists. A hostile environment exists if a reasonable person with similar characteristics and under similar circumstances would consider the conduct to be so severe as to create a hostile environment

The district may take, but is not limited to, the following procedures and remedial action to address and stop sexual harassment:

1. Discipline of staff and students engaging in sexual harassment;
2. Removal of third parties engaged in sexual harassment;

3. Additional supervision in activities;
4. Additional controls for district electronic systems;
5. Trainings and education for staff and students; and
6. Increased notifications regarding district procedures and resources

When a student or staff member is harassed by a third party, the district will consider the following:

1. Removing that third party's ability to contract or volunteer with the district, or be present on district property;
2. If the third party works for an entity that contracts with the district, communicating with the third party's employer;
3. If the third party is a student of another district or school, communicate information related to the incident to the other district or school;
4. Limiting attendance at district events; and
5. Providing for additional supervision, including law enforcement if necessary, at district events

No Retaliation

Retaliation against persons who initiate complaint or otherwise report sexual harassment or who participate in an investigation or other related activities is prohibited. The initiation of a complaint, reporting of behavior, or participation in an investigation, in good faith about behavior that may violate this policy may not adversely affect the:

1. Educational assignments or educational environment of a student or other person initiating the complaint, reporting the behavior, or participating in the investigation; or
2. Any terms or conditions of employment or of work or educational environment of a school or district staff member or other person initiating the complaint, reporting the behavior, or participating in the investigation.

Students who initiate a complaint or otherwise report harassment covered by the policy or who participate in an investigation may not be disciplined for violations of the district's drug and alcohol policies that occurred in connection with the reported prohibited conduct and that were discovered because of the report or investigation, unless the student gave another person alcohol or drugs without the person's knowledge and with the intent of causing the person to become incapacitated and vulnerable to the prohibited conduct.

Notices

When a person³ who may have been affected by this policy files a complaint or otherwise reports behavior that may violate the policy, the district shall provide written notification to the following:

1. Each reporting person;
2. If appropriate, any impacted person who is not a reporting person;
3. Each reported person; and
4. Where applicable, a parent or legal guardian of a reporting person, impacted person, or reported person.

The written notification must include⁴:

1. Name and contact information for all persons designated by the district to receive complaints;
2. The rights of the person that the notification is going to;
3. Information about the internal complaint processes available through the school or district that the student, student's parents, staff member, person or person's parent who filed the complaint may pursue, including the person designated for the school or district for receiving complaints and any timelines;
4. Notice that civil and criminal remedies that are not provided by the school or district may be available to the person through the legal system and that those remedies may be subject to statutes of limitation;
5. Information about services available to the student or staff member through the school or district, including any counseling services, nursing services or peer advising;
6. Information about the privacy rights of the person and legally recognized exceptions to those rights for internal complaint processes and services available through the school or district;
7. Information about, and contact information for, services and resources that are available to the person, including but not limited to:
 - a. For the reporting person, state and community-based resources for persons who have experienced sexual harassment; or
 - b. For the reported persons, information about and contact information for state and community-based mental health services.
8. Notice that students who report about possible prohibited conduct and students who participate in an investigation under this policy may not be disciplined for violations of the district's drug and alcohol policies that occurred in connection with the reported prohibited conduct and that were discovered as

³ Student, staff member, or third party, or if applicable, the student or third party's parent. If the person is a minor, the district should consider when to contact the person's parent.

⁴ Remember confidentiality laws when providing any information.

a result of a prohibited conduct report or investigation unless the student gave another person alcohol or drugs without the person's knowledge and with the intent of causing the person to become incapacitated and vulnerable to the prohibited conduct; and

9. Prohibition of retaliation.

~~Notification, to the extent allowable under state and federal student confidentiality laws, must be provided when the investigation is initiated and concluded. The notification at the conclusion must include whether a violation of the policy was found to have occurred.~~

The notice must:

1. Be written in plain language that is easy to understand;
2. Use print that is of a color, size and font that allows the notification to be easily read; and
3. Be made available to students, students' parents, staff members and member of the public at each office, at the district office and on the website of the school or district.

Additionally, notice must be provided to the person who initiated the complaint and, if applicable, the person's parents, when an investigation is initiated and when it is concluded. The notification at the conclusion of the investigation must include whether a violation of the policy was found to have occurred, to the extent allowable under state and federal student confidentiality laws.

Oregon Department of Education (ODE) Support

The ODE will provide technical assistance and training upon request

FEDERAL DEFINITION AND PROCEDURES

Federal Definition

Sexual harassment means conduct on the basis of sex that satisfies one or more of the following:

1. An employee of the district conditioning the provision of an aid, benefit, or service of the district on an individual's participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the district's education program or activity⁵;
3. "Sexual assault": an offense classified as a forcible or nonforcible sex offense under the uniform crime reporting system of the Federal Bureau of Investigation;
4. "Dating violence": violence committed by a person who is or has been in a social relationship of a romantic or intimate nature with the victim and where the existence of such a relationship shall be

⁵ "Education program or activity" includes locations, events, or circumstances over which the recipient exercised substantial control over both the respondent and the context in which the sexual harassment occurs." (Title 34 C.F.R. § 106.44(a))

determined based on a consideration of the length of the relationship, the type of relationship and the frequency of interaction between the persons involved in the relationship;

5. “Domestic violence”: felony or misdemeanor crimes of violence committed by a current or former spouse or intimate partner of the victim, by a person with whom the victim shares a child in common, by a person who is cohabitating with or has cohabitated with the victim as a spouse or intimate partner, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person’s acts under the domestic or family violence laws of the jurisdiction; or
6. “Stalking”: engaging in a course of conduct directed at a specific person that would cause a reasonable person fear for the person’s own safety or the safety of others, or suffer substantial emotional distress.

This definition only applies to sex discrimination occurring against a person who is a subject of this policy in the United States. A district’s treatment of a complainant or a respondent in response to a formal complaint of sexual harassment may constitute discrimination on the basis of sex under Title IX.

Federal Procedures

The district will adopt and publish grievance procedures that provide for the prompt and equitable resolution of the student and employee complaints alleging any action that would be prohibited by this policy. *See* JBA/GBN-AR(2) – Federal Law (Title IX) Sexual Harassment Complaint Procedure.

Reporting

Any person may report sexual harassment. This report may be made in person, by mail, by telephone, or by electronic mail, or by any other means that results in the Title IX Coordinator receiving the person’s verbal or written report. The report can be made at any time.

The director of student services is designated as the Title IX Coordinator and can be contacted at 541-367-7115. The Title IX Coordinator will coordinate the district’s efforts to comply with its responsibilities related to this policy. The district prominently will display the contact information for the Title IX Coordinator on the district website and in each handbook

Response

The district will promptly respond to information, allegations or reports of sexual harassment when there is actual knowledge of such harassment, even if a formal complaint has not been filed.⁶ The district shall treat complainants and respondents equitably by providing supportive measures⁷ to the complainant and by

⁶ (Title 34 C.F.R. §106.44(a)) Response cannot be deliberately indifferent. A recipient is deliberately indifferent only if its response to sexual harassment is clearly unreasonable in light of the known circumstances.

⁷ (Title 34 C.F.R. § 106.44(a)) Supportive measures means non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures are designed to restore or preserve equal access to the recipient’s education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the district’s educational environment, or deter sexual harassment. The district must maintain

following a grievance procedure⁸ prior to imposing any disciplinary sanctions or other actions that are not supportive measures against a respondent. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures.

The Title IX Coordinator must promptly contact the complainant to discuss the availability of supportive measures, consider the complainant's wishes, with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint.⁹

If after an individualized safety and risk analysis, it is determined that there is an immediate threat to the physical health or safety of any person, an emergency removal of the respondent can take place.¹⁰ The district must provide the respondent with notice and an opportunity to challenge the decision immediately following the removal. A non-student employee may also be placed on non-disciplinary administrative leave pending the grievance process.

Notice

The district shall provide notice to all applicants for admission and employment, students, parents or legal guardians, employees, and all unions or professional organizations holding collective bargaining or professional agreements with the district of the following:

1. The name or title, office address, electronic mail address, and telephone number of the Title IX Coordinator(s);
2. That the district does not discriminate on the basis of sex in the education program or activity that it operates, as required by Title IX. This includes admissions and employment; and
3. The grievance procedure and process, how to file a formal complaint of sex discrimination or sexual harassment, and how the district will respond.

Inquiries about the application to Title IX and its requirements may be referred to the Title IX coordinator or the Assistant Secretary¹¹, or both

No Retaliation

as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of the recipient to provide supportive measures. (Title 34 C.F.R. § 99.30(a))

⁸ This grievance procedure must meet the requirements of Title 34 C.F.R. § 106.45 (included in accompanying administrative regulation, *see* JBA/GBN-AR(2) - Federal Law (Title IX) Sexual Harassment Complaint Procedure).

⁹ The Title IX coordinator may also discuss that the Title IX coordinator has the ability to file a formal complaint.

¹⁰ The district may still have obligations under Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973 or the American with Disabilities Act (ADA). (Title 34 C.F.R. § 106.44(c))

¹¹ Of the United States Department of Education.

Neither the district or any person may retaliate¹² against an individual for reporting, testifying, providing evidence, being a complainant, otherwise participating or refusing to participate in any investigation or process in accordance with this procedure. The district must keep confidential the identity of parties and participating persons, except as disclosure is allowed under Family Educational Rights and Privacy Act (FERPA), as required by law, or to carry out the proceedings herein. Complaints of retaliation may be filed using these procedures.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a grievance proceeding does not constitute retaliation.

Publication

This policy shall be made available to students, parents of students and staff members. This policy and contact information for the Title IX Coordinator shall be prominently published in the school student handbook and on the district website. This policy shall also be made available at each school office and at the district office. The district shall post this policy on a sign in all grade 6 through 12 schools, on a sign that is at least 8.5 inches by 11 inches in size. A copy of the policy will be made available to any person upon request.

END OF POLICY

Legal Reference(s):

¹² Retaliation includes, but is not limited to, intimidation, threats, coercion, and discrimination.

[ORS 243.706](#)
[ORS 332.107](#)
[ORS 342.700](#)
[ORS 342.704](#)
[ORS 342.708](#)

[ORS 342.850](#)
[ORS 342.865](#)
[ORS 659.850](#)
[ORS 659A.006](#)
[ORS 659A.029](#)

[ORS 659A.030](#)
[OAR 581-021-0038](#)
[OAR 584-020-0040](#)
[OAR 584-020-0041](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2020).

Bartsch v. Elkton School District, FDA-13-011 (March 27, 2014).

Davis v. Monroe County Bd. of Educ., 526 U.S. 629 (1999).

Gebser v. Lago Vista Indep. Sch. Dist., 524 U.S. 274 (1998).¶

Cross Reference(s):

GBN/JBA - Sexual Harassment

GBNA - Hazing, Harassment, Intimidation, Bullying, Menacing or Cyberbullying - Staff

JFCF - Hazing, Harassment, Intimidation, Bullying, Menacing, Cyberbullying, Teen Dating Violence, or Domestic Violence – Student

JHFF/GBNAA - Suspected Sexual Conduct with Students and Reporting Requirements

Sweet Home School District 55

Code: GBN/JBA
Adopted: 11/09/20
Revised/Readopted: 9/12/22; 9/09/24; 8/01/25
Orig. Code: GBN/JBA

Sexual Harassment

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3. Assault when sexual contact occurs without consent²
4. Sexual harassment does not include conduct that is necessary because of a job duty of a school or district staff member or because of a service required to be provided by a contractor, agent, or volunteer, if the conduct is not the product of sexual intent or a person finding another person, or another person's actions, offensive because of that other person's sexual orientation or gender identity.

Examples of sexual harassment may include, but not be limited to, physical touching or graffiti of a sexual nature; displaying or distributing of sexually explicit drawings; pictures and written materials; sexual gestures or obscene jokes; touching oneself sexually or talking about one's sexual behaviors in front of others; or spreading rumors about or rating other students or others as to appearance, sexual activity or performance

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This includes providing resources for support measures to the student, staff member or third party who was subjected to the behavior and taking any actions necessary to remove potential future impact on the student, staff member or third party, but are not retaliatory against the student, staff member or third party being harassed or the person who reported to the district official.

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When a student or staff member is harassed by a third party, the district will consider the following:

1. Removing that third party's ability to contract or volunteer with the district, or be present on district property;
2. If the third party works for an entity that contracts with the district, communicating with the third party's employer;
3. If the third party is a student of another district or school, communicate information related to the incident to the other district or school;
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2. The rights of the person that the notification is going to;
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4. Notice that civil and criminal remedies that are not provided by the school or district may be available to the person through the legal system and that those remedies may be subject to statutes of limitation;
5. Information about services available to the student or staff member through the school or district, including any counseling services, nursing services or peer advising;
6. Information about the privacy rights of the person and legally recognized exceptions to those rights for internal complaint processes and services available through the school or district;
7. Information about, and contact information for, services and resources that are available to the person, including but not limited to:
 - a. For the reporting person, state and community-based resources for persons who have experienced sexual harassment; or
 - b. For the reported persons, information about and contact information for state and community-based mental health services.
8. Notice that students who report about possible prohibited conduct and students who participate in an investigation under this policy may not be disciplined for violations of the district's drug and alcohol policies that occurred in connection with the reported prohibited conduct and that were discovered as

³ Student, staff member, or third party, or if applicable, the student or third party's parent. If the person is a minor, the district should consider when to contact the person's parent.

⁴ Remember confidentiality laws when providing any information.

a result of a prohibited conduct report or investigation unless the student gave another person alcohol or drugs without the person's knowledge and with the intent of causing the person to become incapacitated and vulnerable to the prohibited conduct; and

9. Prohibition of retaliation.

~~Notification, to the extent allowable under state and federal student confidentiality laws, must be provided when the investigation is initiated and concluded. The notification at the conclusion must include whether a violation of the policy was found to have occurred.~~

The notice must:

1. Be written in plain language that is easy to understand;
2. Use print that is of a color, size and font that allows the notification to be easily read; and
3. Be made available to students, students' parents, staff members and member of the public at each office, at the district office and on the website of the school or district.

Additionally, notice must be provided to the person who initiated the complaint and, if applicable, the person's parents, when an investigation is initiated and when it is concluded. The notification at the conclusion of the investigation must include whether a violation of the policy was found to have occurred, to the extent allowable under state and federal student confidentiality laws.

Oregon Department of Education (ODE) Support

The ODE will provide technical assistance and training upon request

FEDERAL DEFINITION AND PROCEDURES

Federal Definition

Sexual harassment means conduct on the basis of sex that satisfies one or more of the following:

1. An employee of the district conditioning the provision of an aid, benefit, or service of the district on an individual's participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the district's education program or activity⁵;
3. "Sexual assault": an offense classified as a forcible or nonforcible sex offense under the uniform crime reporting system of the Federal Bureau of Investigation;
4. "Dating violence": violence committed by a person who is or has been in a social relationship of a romantic or intimate nature with the victim and where the existence of such a relationship shall be

⁵ "Education program or activity" includes locations, events, or circumstances over which the recipient exercised substantial control over both the respondent and the context in which the sexual harassment occurs." (Title 34 C.F.R. § 106.44(a))

determined based on a consideration of the length of the relationship, the type of relationship and the frequency of interaction between the persons involved in the relationship;

5. “Domestic violence”: felony or misdemeanor crimes of violence committed by a current or former spouse or intimate partner of the victim, by a person with whom the victim shares a child in common, by a person who is cohabitating with or has cohabitated with the victim as a spouse or intimate partner, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person’s acts under the domestic or family violence laws of the jurisdiction; or
6. “Stalking”: engaging in a course of conduct directed at a specific person that would cause a reasonable person fear for the person’s own safety or the safety of others, or suffer substantial emotional distress.

This definition only applies to sex discrimination occurring against a person who is a subject of this policy in the United States. A district’s treatment of a complainant or a respondent in response to a formal complaint of sexual harassment may constitute discrimination on the basis of sex under Title IX.

Federal Procedures

The district will adopt and publish grievance procedures that provide for the prompt and equitable resolution of the student and employee complaints alleging any action that would be prohibited by this policy. See GBN/JBA-AR(2) – Federal Law (Title IX) Sexual Harassment Complaint Procedure.

Reporting

Any person may report sexual harassment. This report may be made in person, by mail, by telephone, or by electronic mail, or by any other means that results in the Title IX Coordinator receiving the person’s verbal or written report. The report can be made at any time.

The director of student services is designated as the Title IX Coordinator and can be contacted at 541-367-7115. The Title IX Coordinator will coordinate the district’s efforts to comply with its responsibilities related to this AR policy. The district prominently will display the contact information for the Title IX Coordinator on the district website and in each handbook

Response

The district will promptly respond to information, allegations or reports of sexual harassment when there is actual knowledge of such harassment, even if a formal complaint has not been filed.⁶ The district shall treat complainants and respondents equitably by providing supportive measures⁷ to the complainant and by

⁶ (Title 34 C.F.R. §106.44(a)) Response cannot be deliberately indifferent. A recipient is deliberately indifferent only if its response to sexual harassment is clearly unreasonable in light of the known circumstances.

⁷ (Title 34 C.F.R. § 106.44(a)) Supportive measures means non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures are designed to restore or preserve equal access to the recipient’s education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the district’s educational environment, or deter sexual harassment. The district must maintain

following a grievance procedure⁸ prior to imposing any disciplinary sanctions or other actions that are not supportive measures against a respondent. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures.

The Title IX coordinator must promptly contact the complainant to discuss the availability of supportive measures, consider the complainant's wishes, with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint.⁹

If after an individualized safety and risk analysis, it is determined that there is an immediate threat to the physical health or safety of any person, an emergency removal of the respondent can take place.¹⁰ The district must provide the respondent with notice and an opportunity to challenge the decision immediately following the removal. A non-student employee may also be placed on non-disciplinary administrative leave pending the grievance process.

Notice

The district shall provide notice to all applicants for admission and employment, students, parents or legal guardians, employees, and all unions or professional organizations holding collective bargaining or professional agreements with the district of the following:

1. The name or title, office address, electronic mail address, and telephone number of the Title IX Coordinator(s);
2. That the district does not discriminate on the basis of sex in the education program or activity that it operates, as required by Title IX. This includes admissions and employment; and
3. The grievance procedure and process, how to file a formal complaint of sex discrimination or sexual harassment, and how the district will respond.

Inquiries about the application to Title IX and its requirements may be referred to the Title IX coordinator or the Assistant Secretary¹¹, or both

No Retaliation

as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of the recipient to provide supportive measures. (Title 34 C.F.R. § 99.30(a))

⁸ This grievance procedure must meet the requirements of Title 34 C.F.R. § 106.45 (included in accompanying administrative regulation, *see* GBN/JBA-AR(2) - Federal Law (Title IX) Sexual Harassment Complaint Procedure).

⁹ The Title IX coordinator may also discuss that the Title IX coordinator has the ability to file a formal complaint.

¹⁰ The district may still have obligations under Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973 or the American with Disabilities Act (ADA). (Title 34 C.F.R. § 106.44(c))

¹¹ Of the United States Department of Education.

Neither the district or any person may retaliate¹² against an individual for reporting, testifying, providing evidence, being a complainant, otherwise participating or refusing to participate in any investigation or process in accordance with this procedure. The district must keep confidential the identity of parties and participating persons, except as disclosure is allowed under Family Educational Rights and Privacy Act (FERPA), as required by law, or to carry out the proceedings herein. Complaints of retaliation may be filed using these procedures.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a grievance proceeding does not constitute retaliation.

Publication

This policy shall be made available to students, parents of students and staff members. This policy and contact information for the Title IX Coordinator shall be prominently published in the school student handbook and on the district website. This policy shall also be made available at each school office and at the district office. The district shall post this policy on a sign in all grade 6 through 12 schools, on a sign that is at least 8.5 inches by 11 inches in size. A copy of the policy will be made available to any person upon request.

END OF POLICY

Legal Reference(s):

¹² Retaliation includes, but is not limited to, intimidation, threats, coercion, and discrimination.

[ORS 243.706](#)
[ORS 332.107](#)
[ORS 342.700](#)
[ORS 342.704](#)
[ORS 342.708](#)

[ORS 342.850](#)
[ORS 342.865](#)
[ORS 659.850](#)
[ORS 659A.006](#)
[ORS 659A.029](#)

[ORS 659A.030](#)
[OAR 581-021-0038](#)
[OAR 584-020-0040](#)
[OAR 584-020-0041](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2020).

Bartsch v. Elkton School District, FDA-13-011 (March 27, 2014).

Davis v. Monroe County Bd. of Educ., 526 U.S. 629 (1999).

Gebser v. Lago Vista Indep. Sch. Dist., 524 U.S. 274 (1998). ¶

¶

Cross Reference(s):

AC - Nondiscrimination

ACB - Every Student Belongs

GBNA - Hazing, Harassment, Intimidation, Bullying, Menacing or Cyberbullying - Staff

GBNAA/JHFF - Suspected Sexual Conduct with Students and Reporting Requirements

JBA/GBN - Sexual Harassment

JFCF - Hazing, Harassment, Intimidation, Bullying, Menacing, Cyberbullying, Teen Dating Violence, or Domestic Violence – Student

Sweet Home School District 55

Code: JO-AR
Adopted:

Student Data Suppression Rule

Purpose and Scope

The Sweet Home School District (SHSD) is committed to protecting the privacy of student records in accordance with the Family Educational Rights and Privacy Act (FERPA) and guidance from the Oregon Department of Education (ODE). The following rules establish a consistent, districtwide standard for the reporting of interim and summative assessment results.

The primary objective is to prevent the identification of individual students within public reports, especially when analyzing small student groups or extreme performance outcomes. This rule must be applied consistently across all schools and student groups before any public data review occurs.

Primary Suppression Standards

1. Small Group Reporting (n-size)

Public reports must suppress or aggregate data whenever the size of a student group is small enough that individual students could reasonably be identified.

- Threshold: SHSD and ODE advise extreme caution with groups generally smaller than 10 students.
- Action: Groups with fewer than 10 students will not be reported separately in public documents. These data must be suppressed or aggregated into a larger category to protect confidentiality.

2. Percentage Reporting Thresholds

To prevent the identification of students in high-performing or low-performing categories, specific thresholds for reporting percentages must be utilized.

- Upper Limit: Percentages above 95% must be reported as >95%.
- Lower Limit: Percentages below 5% must be reported as <5%.

3. N-Size Suppression

In addition to suppressing the performance data itself, the associated n-sizes (the number of students in the group) must also be suppressed where required.

- **Rule:** If reporting an n-size would allow someone to calculate the performance of a suppressed group or identify an individual student's result, that n-size must be withheld from the public report.

Implementation Summary

Reporting Category	Rule / Threshold	Reporting Action
Small Groups	n < 10 students	Suppress or Aggregate
High Performance	Result > 95%	Report as ">95%"
Low Performance	Result < 5%	Report as "<5%"
Identifiable n-sizes	Calculation Risk	Suppress associated n-size

Responsibilities

- **District Administration:** Ensure this suppression rule is established and understood by all staff before the first data review cycle of the school year.
- **Data Managers & Building Administrators:** Apply these rules consistently to all public-facing reports, including board presentations and community communications.
- **Internal Reviews:** While internal instructional teams may review disaggregated data to support student growth, these individuals remain bound by FERPA and must ensure that identifiable data is never shared outside of authorized personnel.

Authorization

Superintendent, Sweet Home School District #55

Legal Reference(s):

ORS 326.565

ORS 332.107

Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g

**MEMORANDUM**

To: Board of Directors
From: Kevin Strong
Subject: Bond Related Resolutions
Date: August 5, 2026

I respectfully request that the Board approve the following two resolutions related to the District's bond project. Approval of both resolutions is necessary for the District to receive the \$12,252,000 Oregon School Capital Improvement Matching (OSCIM) Program grant.

Resolution No. 1-2627 authorizes the District to issue and sell up to \$40 million in voter-approved general obligation bonds to fund student safety improvements, career and technical education facilities, and the replacement of aging high school buildings. The resolution also authorizes the Superintendent or Business Manager to finalize the bond structure and sale, appoint the necessary financing professionals, and complete all required tax, disclosure, and post-issuance compliance activities.

Resolution No. 2-2627 authorizes the Superintendent or Business Manager to execute and deliver the OSCIM grant agreement on behalf of the District, along with any related documents necessary to secure the grant funding.

RESOLUTION NO. 1-2627

A RESOLUTION OF SWEET HOME SCHOOL DISTRICT NO. 55, LINN COUNTY, OREGON AUTHORIZING THE ISSUANCE AND SALE OF ONE OR MORE SERIES OF GENERAL OBLIGATION BONDS IN THE AGGREGATE PRINCIPAL AMOUNT NOT TO EXCEED \$40,000,000; DESIGNATING AN AUTHORIZED REPRESENTATIVE, BOND COUNSEL, UNDERWRITER OR PLACEMENT AGENT; AUTHORIZING APPOINTMENT OF A FINANCIAL ADVISOR, PAYING AGENT AND BOND REGISTRAR; AUTHORIZING PUBLISHING OF A NOTICE OF SALE OR EXECUTION OF A BOND PURCHASE AGREEMENT; AND RELATED MATTERS.

WHEREAS, the Board of Directors of Sweet Home School District No. 55, Linn County, Oregon (the "District") submitted to the voters of the District at an election on May 19, 2026, Measure 22-214 which sought the authorization to contract a general obligation bonded indebtedness in an amount not to exceed \$40,000,000 to finance capital costs; and

WHEREAS, a majority of the voters of the District voting on Measure 22-214 approved of the issuance of the general obligation bonded indebtedness; and

WHEREAS, the District now desires to proceed with the issuance of general obligation bonds under the authorization of Measure 22-214 in an amount not to exceed \$40,000,000 to be issued in one or more series.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF SWEET HOME SCHOOL DISTRICT NO. 55, LINN COUNTY, OREGON THAT:

Section 1. Issuance of Bonds. The Board of Directors of the District authorizes the issuance and sale of general obligation bonds in the aggregate principal amount not to exceed \$40,000,000 (the "Bonds"), under the authority of Measure 22-214.

The Bonds shall be issued as negotiable general obligation bonds of the District for a term not to exceed 30 years from date of issuance and may be issued in one or more series, as determined by the Authorized Representative. The Bonds shall have a true interest cost not to exceed six and one-half percent (6.5%) per annum. The District authorizes the Superintendent or the Business Manager, or either of their designees (the "Authorized Representative"), to determine and designate the principal amount of each series, dated dates, interest rates, maturity dates, optional redemption dates, prices and premiums, if any, principal serial maturities, term bond maturity or maturities, denominations, interest payment dates, applicable discount or premium, whether the Bonds are issued as taxable and/or tax-exempt obligations, whether to participate in the Oregon School Bond Guaranty Program or obtain bond insurance or some other form of guaranty or security for the payment of the Bonds, whether the Bonds are issued as current interest bonds,

deferred interest bonds and/or convertible deferred interest bonds, to obtain one or more ratings for the Bonds, and such other provisions as are deemed necessary and desirable for the sale and issuance of the Bonds.

Section 2. Title and Execution of the Bonds. The initial series of Bonds shall be entitled "Sweet Home School District No. 55, Linn County, Oregon, General Obligation Bonds, Series 2026" (the "Series 2026 Bonds"), or such other name approved by the Authorized Representative. Other series of Bonds shall be titled as determined by the Authorized Representative. The Bonds shall bear the manual or facsimile signature of the Chair of the Board of Directors of the District and the manual or facsimile signature of the Superintendent. The Bonds shall be initially issued in book-entry form as a single, typewritten bond for each maturity and issued in the registered name of the nominee of The Depository Trust Company. The Bonds will be issued without certificates being made available to the bondholders.

Section 3. Book-Entry-Only System. Ownership of the Bonds shall be recorded through entries on the books of banks and broker-dealer participants and correspondents that are related to entries on The Depository Trust Company book-entry-only system. The Bonds shall be initially issued in the form of a separate single fully registered type-written bond for each maturity of the Bonds (the "Global Certificates"). Each Global Certificate shall be registered in the name of Cede & Co. as nominee (the "Nominee") of The Depository Trust Company (the "Depository") as the "Registered Owner", and such Global Certificates shall be lodged with the Depository until redemption or maturity of the bond issue. The Paying Agent shall remit payment for the maturing principal and interest on the Bonds to the Registered Owner for distribution by the Nominee for the benefit of the bondholder (the "Beneficial Owner" or "Record Owner") by recorded entry on the books of the Depository participants and correspondents. While the Bonds are in book-entry-only form, the Bonds will be available in denominations of \$5,000 maturity value or any integral multiple thereof.

The Authorized Representative is authorized to file with the Depository a Letter of Representation to induce the Depository to accept the Bonds as eligible for deposit at the Depository. The Underwriter/Placement Agent or the District's Financial Advisor for the Bonds is authorized to provide the Depository with the Preliminary Official Statement, together with the completed Depository's underwriting questionnaire.

The execution and delivery of the Letter of Representation and the providing to the Depository of the Preliminary Official Statement and the underwriting questionnaire shall not in any way impose upon the District any obligation whatsoever with respect to persons having interests in the Bonds other than the Registered Owners of the Bonds as shown on the registration books maintained by the Paying Agent and Bond Registrar. The Paying Agent and Bond Registrar, in writing, shall accept the book-entry-only system and shall agree to take all action necessary to at all times comply with the Depository's operational arrangements for the book-entry-only system. The Authorized Representative may take all other action to qualify the Bonds for the Depository's book-entry-only system.

In the event the Depository determines not to continue to act as securities depository for the Bonds, or the District determines that the Depository shall no longer act, then the District will discontinue the book-entry-only system with the Depository. If the District fails to identify another qualified securities depository to replace the Depository, the Bonds shall no longer be a book-entry-only issue but shall be registered in the registration books maintained by the Paying Agent and Bond Registrar in the name of the Registered Owner as appearing on the registration books of the Paying Agent and Bond Registrar and thereafter in the name or names of the bondholder transferring or exchanging Bonds in accordance with the provisions of Section 4 herein.

With respect to Bonds registered in the registration books maintained by the Paying Agent and Bond Registrar in the name of the Nominee of the Depository, the District, and the Paying Agent and Bond Registrar shall have no responsibility or obligation to any participant or correspondent of the Depository or to any Beneficial Owner on behalf of which such participants or correspondents act as agent for the Registered Owner with respect to:

(i) the accuracy of the records of the Depository, the Nominee or any participant or correspondent with respect to any ownership interest in the Bonds,

(ii) the delivery to any participant or correspondent or any other person, other than a Registered Owner as shown in the registration books maintained by the Paying Agent and Bond Registrar, of any notice with respect to the Bonds, including any notice of redemption,

(iii) the selection by the Depository of the beneficial interest in Bonds to be redeemed in the event the District redeems the Bonds in part, or

(iv) the payment to any participant, correspondent or any other person other than the Registered Owner of the Bonds as shown in the registration books maintained by the Paying Agent and Bond Registrar, of any amount with respect to principal or interest on the Bonds. Notwithstanding the book-entry-only system, the District may treat and consider the Registered Owner in whose name each Bond is registered in the registration books maintained by the Paying Agent and Bond Registrar as the Registered Owner and absolute owner of such Bond for the purpose of payment of principal and interest with respect to such Bond, or for the purpose of giving notices of redemption and other matters with respect to such Bond, or for the purpose of registering transfers with respect to such Bond, or for all other purposes whatsoever. The District shall pay or cause to be paid all principal of and interest on the Bonds only to or upon the order of the Registered Owner, as shown in the registration books maintained by the Paying Agent and Bond Registrar, or their representative attorneys duly authorized in writing, and all such payments shall be valid and effective to fully satisfy and discharge the District's obligation with respect to payment thereof to the extent of the sum or sums so paid.

Upon delivery by the Depository to the District and to the Registered Owner of a Bond of written notice to the effect that the Depository has determined to substitute a new nominee in place of the Nominee then the word "Nominee" in this Resolution shall refer to such new nominee of the Depository, and upon receipt of such notice, the District shall promptly deliver a copy thereof to the Paying Agent and Bond Registrar.

Section 4. Transfer of Bonds. If the book-entry system is not utilized, the Bonds will be issued in certificate form. In such a case, the Bonds are transferable, or subject to exchange, for fully registered Bonds in the denomination of \$5,000 maturity value or integral multiples thereof by the owner thereof in person, or by the owner's attorney, duly authorized in writing, at the office of the Bond Registrar. The Bond Registrar shall maintain a record of the names and addresses of the owners of the Bonds. The records of the registered bond ownership are not public records within the meaning of Oregon Revised Statutes 192.410(4).

All bonds issued upon transfer of or in exchange for Bonds shall be valid general obligation bonds of the District evidencing the same debt and shall be entitled to the same benefits as the Bonds surrendered for such exchange or transfer. All fees, expenses and charges of the Paying Agent and Bond Registrar shall be payable by the District. The Bond Registrar shall not be required to transfer or exchange any Bond after the close of business on the record date or transfer or exchange any Bond called or being called for redemption.

Section 5. Printing Bonds. If the Bonds are not in book-entry form, then the Authorized Representative is authorized to contract for the printing of the Bonds. The Authorized Representative may provide for the printing of, in addition to the original issue of Bonds, if any, additional Bonds to be printed in blank form as to registration and to be designated by appropriate number for the Bond Registrar for delivery to the owner upon transfer or exchange of Bonds. The additional Bonds shall bear the dated date of the Bonds, shall be signed by the manual or facsimile signature of the Chair and shall be attested by the manual or facsimile signature of the Superintendent and the Paying Agent and Bond Registrar shall manually sign the Certificate of Authentication as of the date of delivery or transfer of the Bonds.

Section 6. Sale of Bonds. The Bonds may be sold by a private placement, competitive sale and/or negotiated sale pursuant to ORS 287A.300 as determined by the Authorized Representative. The Authorized Representative shall determine the requirements for the sale of the Bonds, subject to the provisions of this Resolution, that provide the most advantageous terms to the District. If sold at a competitive sale, the Authorized Representative is authorized to prepare the terms of and publish a notice of sale and act upon the bids received. If sold at a negotiated sale or private placement, the Authorized Representative is authorized to negotiate and execute a term sheet, commitment letter, bond purchase agreement, and/or placement agreement setting forth the terms of the sale of the Bonds.

Section 7. Payment of Bonds. If the book-entry system is not utilized, the principal of the current interest Bonds shall be payable upon presentation of the Bonds at maturity at the designated corporate trust office of the appointed Paying Agent. Payment of each installment of interest due each year shall be made by wire, check or draft of the Paying Agent on each interest payment date to the owner thereof whose name and address appears on the registration books of the District maintained by the Paying Agent as of the close of business on the record date as determined by the Authorized Representative. For deferred interest Bonds, the accreted value (representing the original issue price plus accrued and compounded interest) shall be payable at maturity or upon prior redemption at the designated corporate trust office of the appointed Paying Agent, and no

periodic interest payments shall be made prior to maturity or redemption. For convertible Bonds, no periodic interest payments shall be made prior to the applicable conversion date; on and after the conversion date, interest shall be payable on each interest payment date to the owner thereof in the same manner as current interest Bonds, and principal shall be payable at maturity or upon prior redemption.

Section 8. Form of Bonds. The Bonds shall be issued substantially in the form approved by the Authorized Representative and Bond Counsel.

Section 9. Appointment of Paying Agent and Registrar. The Authorized Representative is authorized to designate a Paying Agent and Bond Registrar for the Bonds and to negotiate and execute on behalf of the District a Paying Agent and Registrar Agreement. In addition, the District requests and authorizes the Paying Agent and Registrar to execute the Certificate of Authentication as of the date of delivery of the Bonds.

Section 10. Tax Levy and Pledge. The Bonds shall be a general obligation of the District. The full faith and credit of the District is pledged to the owners of all such Bonds for the payment of the principal and interest on such bonds when due. The District shall levy annually, as provided by law, a direct ad valorem tax upon all of the taxable property within the District in sufficient amount, without limitation, to pay the principal of and interest on all such bonds promptly as they become due and payable. The District covenants with the owners of all such Bonds to pledge such ad valorem taxes in sufficient amount (after taking into consideration discounts taken and delinquencies that may occur in the payment of such taxes and other legally available amounts) to pay the principal of and interest on all such bonds as they respectively become due and payable. Pursuant to ORS 310.145, the District hereby classifies the tax levy described in this section to be taxes imposed to pay the principal and interest on exempt bonded indebtedness and such taxes are not subject to the limits of sections 11 or 11b, Article XI of the Oregon Constitution. The District shall give notice of the classification of the tax levy as provided in ORS 305.583(9)(a) and (10).

Section 11. Conditional Redemption. Any notice of optional redemption may state that the optional redemption is conditional upon receipt by the Bond Registrar of moneys sufficient to pay the redemption price of such Bonds or upon the satisfaction of any other condition, and/or that such notice may be rescinded upon the occurrence of any other event, and any conditional notice so given may be rescinded at any time before payment of such redemption price if any such condition so specified is not satisfied or if any such other event occurs. Notice of such rescission or of the failure of any such condition shall be given by the Bond Registrar to the Registered Owner as promptly as practicable upon the failure of such condition or the occurrence of such other event.

Section 12. Defeasance. The District may defease Bonds by setting aside, with a duly appointed escrow agent, in a special escrow account irrevocably pledged to the payment of the Bonds to be defeased, cash or direct obligations of the United States or obligations the principal of and interest on which are fully and unconditionally guaranteed by the United States in an amount which, in the opinion of an independent certified public accountant, is sufficient without reinvestment to pay all principal and interest on the defeased Bonds until their maturity date or any earlier redemption date. Bonds which have been defeased pursuant to this Section shall be

deemed paid and no longer outstanding, and shall cease to be entitled to any lien, benefit or security under this Resolution except the right to receive payment from such special escrow account.

Section 13. Authorized Uses of the Proceeds of the Bonds. For purposes of ORS 305.583(9)(b), the proceeds of all the bonds issued under the authority of Measure 22-214 shall be used for capital costs, including:

Student Safety: Upgrade emergency communication and lockdown systems at every school

Vocational and Career Training: Upgrade career facilities to prepare students for skilled trades and local jobs

Durable, Secure Classrooms: Replace aging flat-roof high school buildings, modulars and outdoor breezeways with classrooms built for Oregon's climate. Consolidate over 40 exterior entrances with public access to classrooms, restrooms and student areas into a single monitored main entrance during school hours.

Approval of the Bonds secures a matching grant from the Oregon School Capital Improvement Matching (OSCIM) Program in the amount of \$12,252,000.

The District shall give notice of the specification of the authorized uses of the proceeds of bonded indebtedness as provided in ORS 305.583(9)(b) and (10).

Section 14. Contract with Beneficial Owners of Bonds. In consideration of the purchase and acceptance of the Bonds, the provisions of this Resolution and the Bonds shall be deemed to be and shall constitute a contract between the District and the Beneficial Owners of the Bonds. The covenants and agreements to be performed by or on behalf of the District shall be for the equal benefit, protection and security of the Beneficial Owners of any and all Bonds, all of which shall be of equal rank without preference, priority, or distinction among the Bonds.

Section 15. Preservation of Tax Exemption for Interest on the Bonds. The District covenants that it will take all actions necessary to prevent interest on a tax-exempt Bond from being included in gross income for federal income tax purposes, and it will neither take any action nor make or permit any use of proceeds of a tax-exempt Bond or other funds of the District treated as proceeds of such Bond at any time during the term of the Bonds which will cause interest on the Bonds to be included in gross income for federal income tax purposes. The District also covenants that it will, to the extent the arbitrage rebate requirement of Section 148 of the Code, is applicable to the Bonds, take all actions necessary to comply (or to be treated as having complied) with that requirement in connection with the Bonds, including the calculation and payment of any penalties that the District has elected to pay as an alternative to calculating rebatable arbitrage, and the payment of any other penalties if required under Section 148 of the Code to prevent interest on the Bonds from being included in gross income for federal income tax purposes.

Section 16. Appointment of Underwriter or Placement Agent. Piper Sandler & Co. is appointed as the Underwriter or Placement Agent in connection with the issuance of the Series 2026 Bonds.

Section 17. Appointment of Financial Advisor. The Authorized Representative is authorized to appoint a Financial Advisor to the District for the issuance of a series of Bonds.

Section 18. Appointment of Bond Counsel. The law firm of Foster Garvey P.C. of Portland, Oregon is appointed as Bond Counsel to the District for the issuance of the Series 2026 Bonds.

Section 19. Preliminary and Final Official Statement. The District shall prepare, or cause to be prepared, a preliminary official statement for the Bonds which shall be available for distribution to prospective purchasers of the Bonds, if desirable or necessary. The Authorized Representative is authorized to deem such preliminary official statement final pursuant to Rule 15c2-12 of the Securities and Exchange Commission. In addition, an official statement shall be prepared and ready for delivery to the purchasers of the Bonds no later than the seventh (7th) business day after the sale of the Bonds, if desirable or necessary. When the District determines that the final official statement does not contain any untrue statement of a material fact or omit to state any material fact necessary to make the statements contained in the official statement not misleading in the light of the circumstances under which they are made, the Authorized Representative is authorized to certify the accuracy of the official statement on behalf of the District.

Section 20. Closing of the Sale and Delivery of the Bonds. The Authorized Representative is authorized to determine and execute all the documents, including a tax certificate, and perform any and all other things or acts necessary for the sale and delivery of the Bonds as herein authorized. Such acts of the Authorized Representative are for and on behalf of and are authorized by the Board of Directors of the District.

Section 21. Continuing Disclosure. The District covenants and agrees that it will comply with and carry out all of the provisions of a Continuing Disclosure Certificate to be executed by the District, if desirable or necessary. Failure by the District to comply with the Continuing Disclosure Certificate will not constitute an event of default; however, any Beneficial Owner may take such actions as may be necessary and appropriate, including seeking mandate or specific performance by court order, to cause the District to comply with its obligations under this section.

Section 22. Post Issuance Compliance Procedures. The Authorized Representative is directed to establish post issuance compliance procedures to ensure that (a) the interest on obligations issued by the District which is not included in gross income for federal income tax purposes remains exempt from federal income tax and (b) the obligation of the District to provide continuing disclosure as described in the Continuing Disclosure Certificate is met in substantially the form attached as Exhibit A, with such changes as may be approved by the Authorized Representative.

Section 23. Effective Date. This Resolution shall take effect on the date of its adoption.

ADOPTED by the Board of Directors of Sweet Home School District No. 55, Linn County, Oregon, this 10th day of August, 2026.

**SWEET HOME SCHOOL DISTRICT NO. 55
LINN COUNTY, OREGON**

Board Chair

ATTEST:

Board Clerk

Exhibit A

POST-ISSUANCE COMPLIANCE PROCEDURES FOR BONDS

1. Purpose. The purpose of these post-issuance compliance procedures ("Compliance Procedures") for tax-exempt bonds and other obligations (sometimes collectively referred to herein as "bonds" or "tax-exempt bonds") issued by Sweet Home School District, Linn County, Oregon (the "District") for which federal tax exemption is provided by the Internal Revenue Code of 1986, as amended (the "Code"), is to facilitate compliance by the District with the applicable requirements of the Code that must be satisfied after the issue date of the bonds to maintain the tax exemption for the bonds after the issue date. This procedure also facilitates compliance by the District with the applicable requirements of federal securities laws relating to bonds.

TAX COMPLIANCE PROCEDURES

2. Responsibility for Monitoring Post-Issuance Tax Compliance. The Board of Education of the District has the overall, final responsibility for monitoring whether the District is in compliance with post-issuance federal tax requirements for the District's tax-exempt bonds. However, the Board of Education has delegated the primary operating responsibility to monitor the District's compliance with post-issuance federal tax requirements for the District's bonds. The Board of Education also has authorized and directed the Business Manager of the District (the "Business Manager") to adopt and implement on behalf of the District these Compliance Procedures.

3. Arbitrage Yield Restriction and Rebate Requirements. The Business Manager will maintain or cause to be maintained records of:

(a) purchases and sales of investments made with bond proceeds (including amounts treated as "gross proceeds" of bonds under section 148 of the Code) and receipts of earnings on those investments;

(b) expenditures made with bond proceeds (including investment earnings on bond proceeds) in a timely and diligent manner for the governmental purposes of the bonds, such as for the costs of purchasing, constructing and/or renovating property and facilities;

(c) information showing, where applicable for a particular calendar year, that the District was eligible to be treated as a "small issuer" in respect of bonds issued in that calendar year because the District did not reasonably expect to issue more than \$5,000,000 of tax-exempt bonds in that calendar year;

(d) calculations that will be sufficient to demonstrate to the Internal Revenue Service ("IRS") upon an audit of a bond issue that, where applicable, the District has complied with an available spending exception to the arbitrage rebate requirement in respect of that bond issue;

(e) calculations that will be sufficient to demonstrate to the IRS upon an audit of a bond issue for which no exception to the arbitrage rebate requirement was applicable, that the rebate amount, if any, that was payable to the United States of America in respect of investments made with gross proceeds of that bond issue was calculated and timely paid with Form 8038-T timely filed with the IRS; and

(f) information and records showing that investments held in yield-restricted advance refunding or defeasance escrows for bonds, and investments made with unspent bond proceeds after the expiration of the applicable temporary period, were not invested in higher-yielding investments.

4. Restrictions on Private Business Use and Private Loans. The Business Manager will adopt procedures calculated to educate and inform the principal operating officials of those departments, including utility departments, if any, of the District (the “users”) for which land, buildings, facilities and equipment (“property”) are financed with proceeds of tax-exempt bonds about the restrictions on private business use that apply to that property after the bonds have been issued, and of the restriction on the use of proceeds of tax-exempt bonds to make or finance any loan to any person other than a state or local government unit.

In particular, following the issuance of bonds for the financing of property, the Business Manager shall provide to the users of the property a copy of these Compliance Procedures and other appropriate written guidance advising that:

(a) “private business use” means use by any person other than a state or local government unit, including business corporations, partnerships, limited liability companies, associations, nonprofit corporations, natural persons engaged in trade or business activity, and *the United States of America and any federal agency*, as a result of ownership of the property or use of the property under a lease, management or service contract (except for certain “qualified” management or service contracts), output contract for the purchase of electricity or water, privately sponsored research contract (except for certain “qualified” research contracts), “naming rights” contract, “public-private partnership” arrangement, or any similar use arrangement that provides special legal entitlements for the use of the bond-financed property;

(b) under section 141 of the Code, no more than 10% of the proceeds of any tax-exempt bond issue (including the property financed with the bonds) may be used for private business use, of which no more than 5% of the proceeds of the tax-exempt bond issue (including the property financed with the bonds) may be used for any “unrelated” private business use—that is, generally, a private business use that is not functionally related to the governmental purposes of the bonds; and no more than *the lesser* of \$5,000,000 or 5% of the proceeds of a tax-exempt bond issue may be used to make or finance a loan to any person other than a state or local government unit;

(c) before entering into any special use arrangement with a nongovernmental person that involves the use of bond-financed property, the user must consult with the Business Manager and provide the Business Manager with a description of the proposed nongovernmental use arrangement, and determine whether that use arrangement, if put into effect, will be consistent with the restrictions on private business use of the bond-financed property;

(d) in connection with the evaluation of any proposed nongovernmental use arrangement, the Business Manager should consult with nationally recognized bond counsel to the District as may be necessary to obtain federal tax advice on whether that use arrangement, if put into effect, will be consistent with the restrictions on private business use of the bond-financed property, and, if not, whether any “remedial action” permitted under section 141 of the Code may be taken by the District as a means of enabling that use arrangement to be put into effect without adversely affecting the tax-exempt status of the bonds that financed the property; and

(e) the Business Manager and the user of the property shall maintain records of such nongovernmental uses, if any, of bond-financed property, including copies of the pertinent leases, contracts or other documentation, and the related determination that those nongovernmental uses are not inconsistent with the tax-exempt status of the bonds that financed the property.

5. Records to be Maintained for Tax-Exempt Bonds. It is the policy of the District that, unless

otherwise permitted by future IRS regulations or other guidance, written records (which may be in electronic form) will be maintained with respect to each bond issue for as long as those bonds remain outstanding, plus three years. For this purpose, the bonds include refunding bonds that refund the original bonds and thereby refinance the property that was financed by the original bonds.

The records to be maintained are to include:

- (a) the official Transcript of Proceedings for the original issuance of the bonds;
- (b) records showing how the bond proceeds were invested, as described in 3(a) above;
- (c) records showing how the bond proceeds were spent, as described in 3(b) and 4(c) above, including purchase contracts, construction contracts, progress payment requests, invoices, cancelled checks, payment of bond issuance costs, and records of “allocations” of bond proceeds to make reimbursement for project expenditures made before the bonds were actually issued;
- (d) information, records and calculations showing that, with respect to each bond issue, the District was eligible for the “small issuer” exception or one of the spending exceptions to the arbitrage rebate requirement or, if not, that the rebate amount, if any, that was payable to the United States of America in respect of investments made with gross proceeds of that bond issue was calculated and timely paid with Form 8038-T timely filed with the IRS, as described in 3(c), (d) and (e) above; and
- (e) records showing that special use arrangements, if any, affecting bond-financed property made by the District with nongovernmental persons, if any, are consistent with applicable restrictions on private business use of property financed with proceeds of tax-exempt bonds and restrictions on the use of proceeds of tax-exempt bonds to make or finance loans to any person other than a state or local government unit, as described in 4 above.

The basic purpose of the foregoing record retention policy for the District’s tax-exempt bonds is to enable the District to readily demonstrate to the IRS upon an audit of any tax-exempt bond issue that the District has fully complied with all federal tax requirements that must be satisfied after the issue date of the bonds so that those bonds continue to be tax-exempt under the Code.

6. Identification and Remediation of Potential Violations of Federal Tax Requirements for Tax-Exempt Bonds.

(a) So long as any of the District’s tax-exempt bond issues remain outstanding, the Business Manager will periodically consult with the users of the District’s bond-financed property to review and determine whether current use arrangements involving that property continue to comply with applicable federal tax requirements as described in these Compliance Procedures. This may be accomplished, for example, by periodically meeting with users, providing questionnaires to users about current use arrangements, or adopting other protocols reasonably calculated to ensure compliance with applicable federal tax requirements on a continuing basis. This periodic review may be scheduled, for example, at or before the times that the District is required to file with the Municipal Securities Rulemaking Board the annual financial information and operating data pursuant to the District’s undertaking to provide continuing disclosure with respect to outstanding bond issues.

(b) If at any time during the life of an issue of tax-exempt bonds, the District discovers that a violation of federal tax requirements applicable to that issue may have occurred, the Business Manager will consult with bond counsel to determine whether any such violation actually has occurred and,

if so, take prompt action to accomplish an available remedial action under applicable Internal Revenue Service regulations or to enter into a closing agreement with the Internal Revenue Service under the Voluntary Closing Agreement Program described under Notice 2008-31 or other future published guidance.

7. Education Policy With Respect to Federal Tax Requirements for Tax-Exempt Bonds. It is the policy of the District that the Business Manager and their staff, as well as the principal operating officials of those departments of the District for which property is financed with proceeds of tax-exempt bonds should be provided with education and training on federal tax requirements applicable to tax-exempt bonds.

DISCLOSURE COMPLIANCE PROCEDURES

8. Responsibility for Monitoring Post-Issuance Disclosure Compliance. The Board of Education of the District has the overall, final responsibility for monitoring whether the District is in compliance with post-issuance federal securities law requirements for the District's bonds. However, the Board of Education has delegated the primary operating responsibility to monitor the District's compliance. The Board of Education also has authorized and directed the Business Manager to adopt and implement on behalf of the District these Compliance Procedures.

9. The District will comply with all continuing disclosure agreements under SEC Rule 15c2-12 (the "Rule"). The Rule prohibits any broker, dealer, or municipal securities dealer from acting as an underwriter in a primary offering of municipal securities unless the District promises in writing to provide certain ongoing information. The annual financial information is to be sent to the MSRB as designated by the SEC. The Business Manager will coordinate with staff, and may engage a dissemination agent, counsel or other professionals to assist in performing the actions listed below.

10. The Business Manager will compile and maintain a set of currently effective continuing disclosure agreements of the District (the "Current Agreements".)

11. The Business Manager shall ensure that all necessary financial and operating data is filed in the manner and by the filing dates set forth in the Current Agreements. The Business Manager shall review the Current Agreements annually prior to the filing dates keeping in mind the information and timing requirements may differ between Current Agreements. As part of the annual review, the Business Manager shall also review prior filings made within the past five years subsequent to the last such review of prior filings and the Business Manager will remedy and prior late or missing filings.

12. The Business Manager shall keep a calendar of filing dates required under the Current Agreement and subscribe to notification services made available through the EMMA system.

13. The Business Manager shall monitor the occurrence of the following events and/or other events set forth in the Current Agreements and shall provide notice of the same in the manner required by the applicable Current Agreement (likely within 10 days of occurrence):

- a. Principal and interest payment delinquencies;
- b. Non-payment related defaults, if material;
- c. Unscheduled draws on debt service reserves reflecting financial difficulties;
- d. Unscheduled draws on credit enhancements reflecting financial difficulties;
- e. Substitution of credit or liquidity providers, or their failure to perform;

- f. Adverse tax opinions, the issuance by the Internal Revenue Service of proposed or final determinations of taxability, Notices of Proposed Issue (IRS Form 5701-TEB) or other material notices or determinations with respect to the tax status of the Obligations, or other events affecting the tax status of the Bonds;
- g. Modifications to rights of Bond holders, if material;
- h. Bond calls, if material, and tender offers;
- i. Defeasances;
- j. Release, substitution or sale of property securing repayment of the Bonds, if material;
- k. Rating changes;
- l. Bankruptcy, insolvency, receivership or similar event of the District;
- m. The consummation of a merger, consolidation, or acquisition involving the District, or the sale of all or substantially all of the assets of the District, other than in the ordinary course of business, the entry into a definitive agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms, if material;
- n. Appointment of a successor or additional trustee or the change of name of a trustee, if material.
- o. Incurrence of a financial obligation of the obligated person, if material, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a financial obligation of the obligated person, any of which affect security holders, if material; and
- p. Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a financial obligation of the obligated person, any of which reflect financial difficulties; and
- q. Notice of a failure to provide required annual financial information, on or before the date specified in the written agreement or contract.

14. The Business Manager shall review drafts of any official statement for a new offering of securities and with assistance with its dissemination agent, counsel, or other agents of the District, as applicable, and shall determine that the official statement accurately and completely describes the District's continuing disclosure compliance history within the five years prior to the date of the official statement. This compliance review is not intended to limit the District's other reviews of or diligence procedures relating to its official statements.

15. The Business Manager shall arrange for annual disclosure training with bond counsel for the Business Manager and designated staff to include education on these procedures and the disclosure obligations under federal and state securities laws.

SWEET HOME SCHOOL DISTRICT NO. 55
Linn County, Oregon

RESOLUTION NO. 2-2627

A RESOLUTION AUTHORIZING EXECUTION OF THE ARTICLE XI-P GRANT AGREEMENT

WHEREAS, the Oregon Department of Education has awarded Sweet Home School District No. 55 ("District") an Oregon School Capital Improvement Matching Program grant in an amount not to exceed \$12,252,000; and

WHEREAS, the Oregon Department of Education has provided the District with an Article XI-P Grant Agreement governing the award and use of the grant funds; and

WHEREAS, the Grant Agreement requires authorization by the Board of Directors before it is executed on behalf of the District.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF SWEET HOME SCHOOL DISTRICT NO. 55 AS FOLLOWS:

1. The Article XI-P Grant Agreement between the State of Oregon, acting by and through the Oregon Department of Education, and Sweet Home School District No. 55 is approved.
2. The Superintendent or Business Manager is authorized to execute and deliver the Grant Agreement on behalf of the District and to execute any documents reasonably necessary to carry out the Grant Agreement.
3. This Resolution takes effect immediately upon adoption.

ADOPTED by the Board of Directors of Sweet Home School District No. 55 this 10th day of August, 2026.

SWEET HOME SCHOOL DISTRICT NO. 55
Linn County, Oregon

Chair, Board of Directors

ATTEST:

Superintendent/Clerk