



## 2015–16 STAFF ORIENTATION

There are several school board policies and collective bargaining provisions that principals and directors are required to review each fall with your school or department staff. Please review all items on the list below and have each employee check off that they have heard the information and then sign and date the document:

- 2015–16 Summary of Spending Guidelines and Controls
- Wellness Policy
- Student Discipline Procedures
- School Board Policy JB: Harassment, Intimidation, Bullying, Cyberbullying, Hazing and Teen Dating Violence
- School Board Policy JFG: Transgender and Gender Nonconforming Students, and its accompanying Administrative Rule
- School Board Policy JHCD: Administering Medication in School
- School Board Policy JHCCA/JHCCB: AIDS, HIV, and Hepatitis B
- School Board Policy AC: Nondiscrimination
- School Board Policy GBN: Sexual Harassment and District Administrative Rules G1140, G1150, G1160 and G1170, Prohibiting All Forms of Harassment and Discrimination
- District Administrative Rules G2100 and G2120: Professional Conduct and Respectful Workplace
- District Administrative Rule: Attendance Expectations
- School Board Policy GBCBA: Drug and Alcohol Abuse by Employees and District Administrative Rule 2430, Substance Abuse
- School Board Policies GBK: Use of Tobacco Products; JFCG, Use of Tobacco by Students; and Policy JFCH/JFCI, Drug, Tobacco and Alcohol Abuse by Students
- Technology Appropriate Use Guidelines
- Staff E-mail Usage and Use of District Property
- Process for Handling Complaints Against Staff by Principal or Department Director
- Guidelines for Political Activity by Employees and Political Activities Notice
- Reporting Child Abuse - Child Abuse and Sexual Conduct Posting and District Administrative Rule G2400: Child Abuse
- Reporting Sexual Conduct Toward Students by School Employees, District Administrative Rule G2400.01
- Locked Spaces
- Community Educators (Guest Speakers) and Outside Presenters

I have been informed of each of the above items and understand the policy or provision.

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date



# Financial Procedures for Schools and Departments

*Updated for 2015–16 (v1.1)*

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**Lane County School District 4J**

**Financial Services**

200 N. Monroe Street • Eugene, OR 97402

p. 541-790-7600 • <http://www.4j.lane.edu/finance>

## Financial Procedures for Schools and Departments FY16

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Updated August 19, 2015  
Contact [accounting@4j.lane.edu](mailto:accounting@4j.lane.edu) for questions

**CONTENTS**

**GUIDANCE FOR USING MANUAL .....7**  
*Additional Financial Activity Manuals ..... 7*

**FINANCIAL SERVICES CONTACTS.....8**  
*Distribution Lists and Email ..... 8*  
*Financial Services Contacts, Alphabetical ..... 8*  
*Financial Services Contact List by Responsibility Area ..... 9*  
*Contacts for Requesting System Authorization for Financial Activities ..... 10*

**FINANCIAL TASKS AND TIMELINE ..... 11**  
*Annual Activities ..... 11*  
*Month End Closing Activities ..... 11*  
*Month End Closing Tasks ..... 11*  
*2015–16 Calendar for Financial Services Due Dates ..... 12*

**ETHICS..... 14**  
*Ethics Considerations ..... 14*  
*Who Must Consider Ethics ..... 14*  
*Spending Public Funds ..... 14*  
*Penalties for Violation ..... 15*  
*Ethics Guidelines ..... 15*  
*General Guidelines ..... 15*  
*Receiving Gifts ..... 15*  
*Giving Gifts ..... 15*  
*The Public Test ..... 16*  
*Frequently Asked Questions Regarding Ethics\* ..... 16*

**BUDGETING AND ACCOUNTING GUIDE..... 18**  
*Fund Accounting ..... 18*  
*Governmental Funds ..... 18*  
*Proprietary Funds ..... 18*  
*Public Funds ..... 18*  
*2015–16 BUDGET PREPARATION BY FUND ..... 19*  
*What’s in My School Budget? ..... 20*  
*What’s in My Department Budget? ..... 21*  
*Chart of Accounts ..... 22*  
*Posting Account Numbers ..... 22*  
*Site Defined Sub-accounts ..... 22*  
*Discretionary Budget ..... 22*  
*Overview of Discretionary Budget ..... 22*  
*Lawson Financial Reports ..... 23*  
*How to Find Lawson Reports ..... 23*  
*Report Overview: Current School Financial Review ..... 23*  
*Report Overview: Current Financial Report ..... 24*  
*Considerations for Understanding Reports ..... 24*  
*Example: How to Create a Financial Report for School ..... 25*  
*Create Report in Lawson ..... 25*

## Financial Procedures for Schools and Departments FY16

---

Tracking Expenditures and Overspending .....	25
Considering Year-end Expenditures and Balances .....	25
<i>Sample Current School Financial Review Report</i> .....	27
<i>Reimbursable Account (31211)</i> .....	28
Monthly Reconciliation of Reimbursable Account (31211) .....	28
How to Determine the Amount Owed to the District .....	28
<i>Special Purpose Reserve Fund (Fund 290)</i> .....	29
How to Find Special Purpose Reserve Fund Balance.....	29
How to Read the Current Financial Report for Special Reserve Funds .....	29
Example of report:.....	29
Calculating Special Purpose Reserve Fund Transfer.....	30
<i>Capital Equipment Reserve Fund (Fund 490)</i> .....	31
<i>Using Targeted Funding</i> .....	31
Process for Allocating Targeted Funding.....	31
2015–16 Targeted Funding Allocations (March 5, 2015) .....	32
2015–16 Staff Conversion and Costing Table (July 1, 2015) .....	33
2015–16 Staff Conversion and Costing Table for Payroll and Employee Benefits .....	34
<i>Budget Transfers and Journal Entries</i> .....	35
Budget Transfers (BT) .....	35
Journal Entries (JEs).....	35
<i>Record Retention</i> .....	35
<b>SPENDING AUTHORITY AND CONTROLS .....</b>	<b>36</b>
<i>Spending Guidelines Overview</i> .....	36
<i>Signing Authority</i> .....	36
Summary of Authorized Signers .....	37
Roles and Purchasing Authority .....	37
<i>Cost Quotes and Request for Proposals</i> .....	37
Quote Requirements for Goods .....	38
Quote Requirements for Personal Services (ICAs) .....	38
Selecting a Vendor and Sources of Supply .....	38
<i>Buying Equipment</i> .....	38
Purchase Order for Buying Equipment.....	38
Fixed and Attractive Assets Definition/Inventory Requirements.....	39
Assets Purchased with Federal Funds .....	39
<b>Purchasing Requirements .....</b>	<b>41</b>
<i>Methods of Purchasing</i> .....	41
<i>Purchase orders (POs)</i> .....	41
<i>District Purchasing Cards (Visa)</i> .....	41
Overview.....	41
Process for Requesting New Credit Card or Cancellation of Card.....	42
Cardholder Obligations.....	42
Credit Card Limits .....	42
Access Online.....	42
Allowed Credit Card Purchases .....	43
Unallowed Credit Card Purchases .....	43
Vendors Excluded (MCC) .....	43
Required Receipts and Statement Documentation.....	43
Returns and credits .....	44

## Financial Procedures for Schools and Departments FY16

---

Internet Purchase Guidelines .....	44
Fraud Prevention/Fraud Action.....	44
Revoking Credit Card Privilege .....	44
<i>Employee Reimbursements</i> .....	45
<i>Inter-Governmental Agreements (IGA)</i> .....	45
<i>Independent Contractor Agreements (ICA)</i> .....	45
ICA Process .....	45
Paying the Contractor.....	46
<b>GUIDELINES FOR COMMONLY USED ACCOUNTS .....</b>	<b>48</b>
<i>Petty Cash</i> .....	48
Petty Cash.....	48
<i>Professional Development Costs</i> .....	48
Professional Development Plans.....	48
Professional Development Allowable Use .....	48
Recording Use of PD .....	48
<i>Meetings, Travel, and Meals</i> .....	48
Non-Travel Food Purchases.....	48
Spending Limit for Meal Purchases .....	49
<i>In-District Travel</i> .....	49
<i>Out of District and Out of State Travel</i> .....	50
Overview of Travel Expenditures .....	50
Approval for Out of District and Out of State Travel.....	50
Transportation Costs .....	50
Lodging Costs.....	50
<i>Corporate Travel Agency (Azumano Travel)</i> .....	51
Using Azumano.....	51
<i>Staff Celebrations and Flowers</i> .....	51
Staff Celebrations .....	51
Flowers .....	51
<i>Gifts and Gift Cards</i> .....	52
Volunteers .....	52
Staff .....	52
Students.....	52
<b>Payroll.....</b>	<b>54</b>
<i>Submission Dates</i> .....	54
Payroll Forms: Timesheets .....	54
Payroll Forms: Direct Deposit Request.....	54
Other Payroll Forms.....	54
<i>Payroll Forms and Information</i> .....	54
Payroll Forms Online .....	54
Monthly Wage Statements (My Pay Stub) .....	54
W-2s.....	55
<i>Employee Self Service</i> .....	55
Time and Absence Reporting .....	55
Personal Profile .....	55
Leave Balances .....	55
Pay Checks.....	55
<i>Additional Compensation</i> .....	55

## Financial Procedures for Schools and Departments FY16

---

Classified Overtime/Additional Hours .....	55
Licensed/Administrator/Professional Extended Contracts .....	56
<i>Purchasing Additional Staffing</i> .....	56
Non-grant fund (not fund 260) purchases .....	56
Grant Fund (260) purchases .....	56
<i>Labor Laws and Exempt Status</i> .....	56
Fair Labor Standards Act (FLSA).....	56
<b>Nutrition Services .....</b>	<b>57</b>
<i>Important Phone Numbers:</i> .....	57
<i>Catering</i> .....	57
<i>Free and Reduced Applications</i> .....	57
<b>Warehouse.....</b>	<b>58</b>
<i>Confidential Shred</i> .....	58
<i>In-District Mail</i> .....	58
<i>Surplus Property/Loaner Equipment</i> .....	58
Items available for loan: .....	58
<i>Warehouse Catalog for Schools and Departments</i> .....	59
<i>Warehouse Delivery Schedule</i> .....	61
<b>Wellness Policy.....</b>	<b>63</b>
<i>Healthy Snacks Guidelines</i> .....	63
Snack Foods .....	63
Beverages .....	63
<i>Healthy Parties Guidelines</i> .....	64
Encouraged Beverages .....	64
Encouraged Foods .....	65
<i>Portion Sizes</i> .....	65
<i>Catering</i> .....	65
<b>CHECKLISTS.....</b>	<b>66</b>
<i>Spending Approval Checklist</i> .....	67
<i>Principal Monthly Checklist</i> .....	68
<b>FORMS AND TECHNICAL ASSISTANCE .....</b>	<b>69</b>

### **GUIDANCE FOR USING MANUAL**

This manual is intended to provide guidance for school and department staff who work with financial information. In the electronic version the quickest way to find information is to search for key words. For printed versions, find information by topic in the Table of Contents.

#### **Additional Financial Activity Manuals**

Additional resources *not included in this manual* are:

1. Grants and Gifts Manual (for Fund 260 activities and receiving donations)
2. Chart of Accounts (full list of all funds and accounts, with explanations for use)
3. Student Body Manual (for guidance in spending and recording financial information for Student Body activities)
4. INFOR Student Activities School User Manual (for technical use of the Student Activities module)

Please see the Financial Services intranet to download current manuals, which may be updated periodically throughout the year. Access is at: <http://www.4j.lane.edu/finance/intranet/>. NOTE: Access is only available through a 4J connection or through VPN access.



## **FINANCIAL SERVICES CONTACTS**

*Financial Services is organized in a cross-functional system that allows for multiple contacts and support. The best way to contact Finance is to use one of the distribution lists or shared emails.*

### **Distribution Lists and Email**

- accounting@4j.lane.edu (all Lawson, journal entry, and general accounting)
- acctspayable@4j.lane.edu (all vendor payment requests, travel reimbursements)
- billings@4j.lane.edu (invoicing for substitutes, supplies, bus trips, etc.)
- budget@4j.lane.edu (all budget activity)
- bussys@4j.lane.edu (Lawson and other Finance technology support)
- grants@4j.lane.edu (Grants, including EEF gifts and grants; Funds 260, 270, 275)
- studentbody@4j.lane.edu (school accounting, student activities)
- payroll@4j.lane.edu (paychecks, garnishments)
- purchasing@4j.lane.edu (Vendor Contracts, RFPs, Purchase Orders)

### **Financial Services Contacts, Alphabetical**

Main Line: x7600

Fax: 541-790-7605

<http://www.4j.lane.edu/finance>

<b>Staff</b>	<b>Title - Responsibility Area</b>	<b>Ext.</b>	<b>E-Mail @4j.lane.edu</b>
Alferes, Carol	Payroll M-Z	7612	alferes
Belz, Andrea	Associate Director	7608	belz_a
Brown, Monica	CFO & Director of Support Services	7606	brown_mo
Cone, Julie	Purchasing	7620	cone_ju
Cowan, Marla	Accounts Payable	7615	cowan_m
Eichler, Janette	Payroll A-L	7613	eichler
Elizondo, Eugenia	Purchasing, Fixed Assets, and Contracts	7611	elizondo_e
Gordon, Matt	Business Systems Analyst	7626	gordon_ma
Gripp, Nancy	General Accounting	7621	gripp
Hebard, Tyler	Payroll and Accounts Payable Supervisor	7622	hebard
Landeros, Ariana	PERS, Billing, and Visas	7617	landeros_a
Langan, Holly	Accounting and Reporting Supervisor	7610	langan_h
Mangus, Jenny	Accounts Payable	7609	mangus_j
McMahon, Trena	Budget System	7616	mcmahon_t
Montes, Maria	Student Body Accounting & Budget	7607	montes_m
Myrand, Sharon	Budget and Reporting Supervisor	7624	myrand_s
Palandri, Mike	Business Systems Specialist	7628	palandri
Peterson, Janet	General Accounting and Reports	7627	peterson_ja
Pickering, Terry	Technology Support Manager	7623	pickering
Sunderland, Nicole	General Accounting	7614	sunderland_n

## Financial Procedures for Schools and Departments FY16

### Financial Services Contact List by Responsibility Area

Staff	Responsibility Area	Ext	E-Mail
<b>Leadership</b>			
Brown, Monica	CFO & Director of Support Services	7606	brown_mo
Belz, Andrea	Associate Director, Financial Services	7608	belz_a
<b>Accounting - General Ledger</b>			<b>accounting@</b>
Langan, Holly	Accounting and Reporting Supervisor	7610	langan_h
Gripp, Nancy	General accounting, GL account number setup, and Journal Entry Approval	7621	gripp
Sunderland, Nicole		7614	sunderland_n
Peterson, Janet	Financial Analyst: Reporting	7627	peterson_ja
Landeros, Ariana	Accounting Specialist: Outside billing	7617	billings
<b>Accounting - Grants</b>			<b>grants@</b>
TBD	Grant accounting and reports	7618	grants
<b>Accounting - Student Body</b>			<b>studentbody@</b>
Montes, Maria	Staffing and School Accountant: Student Body, position control	7607	montes_m
<b>Accounts Payable (AP)</b>			<b>acctspayable@</b>
Hebard, Tyler	Payroll and Accounts Payable Supervisor	7622	hebard
Mangus, Jenny	AP Accounting Clerk: Schools and departments, extended contracts, employee reimbursements	7609	mangus_j
Cowan, Marla	AP Accounting Clerk: Facilities, Transportation, Office Depot, OfficeMax, Coastwide, Silke, School Specialty	7615	cowan_m
<b>Budget</b>			<b>budget@</b>
Myrand, Sharon	Budget and Reporting Supervisor; Treasury	7624	myrand_s
McMahon, Trena	Financial Analyst: Budget System	7616	mcmahon_t
Montes, Maria	Staffing and School Accountant: Student Body, Position Control	7607	montes_m
<b>Business Systems (e.g. password reset, system access and security)</b>			<b>bussys@</b>
Pickering, Terry	Technology Support Manager	7623	pickering
Gordon, Matt	Business Info Systems Analyst	7626	gordon_ma
Palandri, Mike	Business Systems Specialist	7628	palandri
<b>Payroll</b>			<b>payroll@</b>
Hebard, Tyler	Payroll and Accounts Payable Supervisor	7622	hebard
Alferes, Carol	Payroll M-Z	7612	alferes
Eichler, Janette	Payroll A-L	7613	eichler
Landeros, Ariana	PERS Support	7617	landeros_a
<b>Purchasing</b>			<b>purchasing@</b>
Cone, Julie (PT Mon-Wed)	Purchasing Analyst: Fixed assets, Purchase Order review, purchasing contracts, ICAs, VISA card holder management	7620	cone_ju
Elizondo, Eugenia		7611	elizondo_e
Landeros, Ariana	Visa statement processing	7617	landeros_a

## Financial Procedures for Schools and Departments FY16

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### Contacts for Requesting System Authorization for Financial Activities

Below are typical authorizations required for staff assigned to complete financial activities. The principal or administrator completes the authorization request for new staff or to update authorizations.

Authorization	Information required	How to Submit
Bank Signature Card	Name, position, ext, and email (See Student Body handbook)	Email <a href="mailto:studentbody@4j.lane.edu">studentbody@4j.lane.edu</a>
Student Activities & Lawson Systems Access, including: <ul style="list-style-type: none"> <li>• Asset Management</li> <li>• General Ledger</li> <li>• Purchase Orders</li> <li>• Warehouse Orders</li> <li>• 4J Employee Information</li> <li>• Time and Absence Approval</li> </ul>	Employee's name, position, and systems for which access is requested	Complete form online: <a href="http://www.4j.lane.edu/finance/intranet/">http://www.4j.lane.edu/finance/intranet/</a> (Go to link, <a href="#">Request New User Setup and Change Access</a> )
Work Orders	Name and position	Contact Facilities x7400, or <a href="mailto:shelby@4j.lane.edu">shelby@4j.lane.edu</a>
Buyer status (for creating and/or authorizing POs)	Name, e-mail address, and dollar limit for authorizing PO's.	Email <a href="mailto:purchasing@4j.lane.edu">purchasing@4j.lane.edu</a>
System Training Request	Employee name, position, and type of training needed	Email <a href="mailto:bussys@4j.lane.edu">bussys@4j.lane.edu</a>
Visa Card (new request and annual renewal)	Complete MOU (download from and submit to purchasing) Note: Standard limit is \$2,500/month and \$1,000/ purchase	Email <a href="mailto:purchasing@4j.lane.edu">purchasing@4j.lane.edu</a>

## **FINANCIAL TASKS AND TIMELINE**

Questions? Contact Accounting at x 7614 or x7621 or by email at [accounting@4j.lane.edu](mailto:accounting@4j.lane.edu)

### **Annual Activities**

<b>Month</b>	<b>Annual Activity</b>
September	<ul style="list-style-type: none"> <li>• Special Purpose Reserve Fund beginning balances entered by Finance</li> </ul>
January	<ul style="list-style-type: none"> <li>• Complete 1099 review with Financial Services</li> <li>• Budget training provided and guidelines posted</li> <li>• Budget system open for entry</li> <li>• Budget worksheets returned to Financial Services</li> </ul>
March	<ul style="list-style-type: none"> <li>• Begin Fixed Asset Inventory Review (complete by end of May)</li> </ul>
May	<ul style="list-style-type: none"> <li>• Special Purpose Reserve Fund review process begins</li> <li>• Student Body internal controls review begins</li> </ul>
June	<ul style="list-style-type: none"> <li>• Special Purpose Reserve Fund transfer request completed</li> <li>• Board approves fleet transfer</li> <li>• End of Year check outs</li> </ul>

### **Month End Closing Activities**

Each month Finance closes the period and reconciles accounts and balances. The month end close occurs on the following month on or near the 10<sup>th</sup>, and documentation is due to Financial Services by the 9<sup>th</sup>. Dates vary for weekends or holidays as needed. Schools and departments help with each period close by completing a series of tasks, which also alleviate the time required to close out at the end of the year.








#### **Month End Closing Tasks**

1. Reconcile bank statement (if applicable)
2. Reconcile petty cash account (if applicable)
3. Reconcile 31211 account
4. Review and correct substitute billings as needed
5. Review and pay other billings (bus trips, supplies, other)
6. Submit journal entries and documentation
7. Submit LTD passes information (high schools)
8. Review Open PO report and close POs as needed
9. Submit athletic and club fees and supporting scholarship documentation (MS & HS, quarterly)

# Financial Procedures for Schools and Departments FY16

## 2015–16 Calendar for Financial Services Due Dates

### July 2015–December 2015

-  Invoice Submission Deadline - 5 p.m.
-  Check Run
-  Visa statements due to Accounts Payable
-  SB Bank Reconciliation and Financial Reports due to Student Body Accountant
-  Payroll Information due by the 15th
-  Pay Day
-  Complete month-end tasklist

2015–2016						
July 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

2015–2016						
August 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

2015–2016						
September 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

2015–2016						
October 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31


2015–2016						
November 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26 (H)	27 (H)	28
29	30					


2015–2016						
December 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24 (H)	25 (H)	26
27	28	29	30	31		

# Financial Procedures for Schools and Departments FY16

## January 2016 – June 2016

 Invoice Submission Deadline - 5 p.m.


 Check Run

 Visa statements due to Accounts Payable

 SB Bank Reconciliation and Financial Reports due to Student Body Accountant

 Payroll Information due by the 15th

 Pay Day

 Complete month-end tasklist

2015-2016						
January 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1 (H)	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18 (H)	19	20	21	22	23
24	25	26	27	28	29	30
31						

2015-2016						
February 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15 (H)	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

2015-2016						
March 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

2015-2016						
April 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

2015-2016						
May 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30 (H)	31				

2015-2016						
June 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

### **ETHICS**

Questions? Contact Accounting at x 7614 or x7621 or by email at [accounting@4j.lane.edu](mailto:accounting@4j.lane.edu)

As public employees, all District staff are subject to government ethics laws. All staff are personally responsible for meeting ethics laws. These may be enforced by the Oregon Government Ethics Commission in the case of a breach (<http://www.oregon.gov/ogec>). Oregon government ethic laws prohibit public officials from using their office for financial gain and require public disclosure of economic conflict of interest. Please contact Financial Services for assistance prior to any transactions which may have the appearance of an ethics violation.

#### **Ethics Considerations**

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

*Acceptance of any gratuities, financial or otherwise, from any supplier of materials or services to the district by any Board member, officer or employee of the district is prohibited.*

#### **Who Must Consider Ethics**

- All public officials, defined as: Any person who is serving any public body of the state as an officer, employee, agent, or otherwise – regardless of whether the person is paid for such services.
- Also included are relatives and any businesses with which we are or a relative is associated.
- Relatives include spouses, children, siblings and parents and our spouse's children, siblings and parents.
- **Public officials are held to a higher standard than other citizens.**

#### **Spending Public Funds**

Public confidence in the integrity of Eugene School District 4J purchasing activities is critical. Improprieties, or even the appearance of improprieties, can undermine this confidence with very negative consequences.

- ALL Employees of the District are "Public Officials".
- All Public Officials dealing with purchases in any capacity are required to follow the guidelines in the State of Oregon, Code of Ethics ORS, 244 Government Ethics
- As public officials, we spend taxpayer money; the public holds us to a higher standard of conduct and scrutiny than employees in the private sector.
- District employees must conduct themselves with the highest ethical standards.
- Care must be exercised to avoid even the appearance of impropriety.

All district staff must ensure that there is a district purpose when using district resources. This might include for example use of computer resources (Internet surfing or shopping), purchases for personal consumption, or purchases from relatives or a business with which they are associated.

### **Penalties for Violation**

**For Staff:** Public employees may be subject to fines and penalties and be held *personally financially liable* for inappropriate expenditures, including a civil penalty ranging from \$5,000–25,000 per violation. An additional penalty equal to twice the amount of the financial benefit of the public official may also be imposed. (See ORS 244 for full text of enforcement)

**For District:** Erosion of trust by taxpayers could result in decreased community support and failure of future bond requests and local option levies. Lack of trust by the vendor community could result in contract award protests or an unwillingness to submit bids, thus decreasing competition and potentially increasing the cost of goods or services.

### **Ethics Guidelines**

#### **General Guidelines**

- Employee private business may not be conducted on public time.
- Employee may not sell personal property to the District.
- The District is not allowed to purchase personal property from employees.
- Public supplies, facilities, equipment, and personnel may not be used to carry out employee's private business.
- Employee's public position may not be used for personal gain.
- Employee may not use public contracts for personal use.
- Employee may not bid on District solicitations unless competing with all public bidders.
- Employee should avoid the intent and appearance of unethical or uncompromising practice in relationships, actions, and communications.
- Employee should refrain from any private business or professional activity that would create a conflict between personal interests and the interests of the District.

#### **Receiving Gifts**

Statute limits the gifts public official can receive. Due to recent ethics violations, the 2007 legislature enacted laws that further restricted gift acceptance.

Any gift or gifts with an **aggregate value of \$50** or more during any calendar year from any single source that *could* have an administrative interest in the District cannot be accepted.

- Administrative interest means that they might want you to spend funds a certain way, change curriculum, give their student special treatment, etc.
- Consider what the public (parents, other students, etc.) perception will be if the gift acceptance became common knowledge.

#### **Giving Gifts**

**Employees** may not receive gifts purchased with district managed funds; this includes all federal, state, district, bond, grant, or student body funds.

- Employees should be paid via extended contract or timesheet.
- Non-cash gifts are considered a cash equivalent by IRS and are reported as taxable income.
- Gift Certificates may not be given to employees, regardless of dollar amount.



## Financial Procedures for Schools and Departments FY16

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**Volunteers** may not be given Gift Certificates to show appreciation. However, volunteers may receive a gift of a nominal value (e.g. not exceeding \$25) such as a school t-shirt, cap, etc.

**Students** may receive incentives using grant funds in limited circumstances; see Gifts and Gift Cards section. Director approval is required.

### **The Public Test**

The Oregon Accounting Manual includes a suggestion that several questions be asked during the review process of expenditures, encumbrances, or other kinds of obligations of public funds. The following questions are intended as examples, are not all-inclusive, and are suggested for approving offices because of their potential liability.

Public test questions to ask prior to approving expenditures:

- Is this obligation a responsible and appropriate use of public funds?
- Are there adequate budget resources available now to allow us to incur this obligation?
- Will this obligation or expenditure pass the "public perception" test? That is, would I be comfortable if I saw this transaction written up on the front page of the local newspaper? Am I willing to approve this obligation knowing that I am fully responsible?

### **Frequently Asked Questions Regarding Ethics\***

*\*adapted Beaverton School District HR Department Ethics FAQ: [http://www.beaverton.k12.or.us/pdf/HR/hr\\_EthicsFAQ.pdf](http://www.beaverton.k12.or.us/pdf/HR/hr_EthicsFAQ.pdf)*

ORS 244.040 prohibits public employees from using their position to obtain financial gain or to avoid financial detriment for themselves or their families. Gifts, food, services, activities or entertainment from any single donor are limited to \$50 annually. The following scenarios may assist employees in determining what constitutes ethical behavior as defined by this statute.

**1. A school distributes passes to games and school events for employees and their families.**

Employees may receive free passes to events as they are encouraged to support students. Family members, however, must pay the same rate as the general public.

**2. A parent offers to pay her child's teacher to tutor her child after school.**

This is a conflict of interest. Teachers may not receive remuneration for tutoring their own students. Tutoring students from other schools or classes is acceptable assuming the teacher does not do so during work time or use District.

**3. A Spanish teacher wants to take a group of students to Mexico during the summer. The trip is not District-sponsored, but a travel company has offered to pay the teacher's expenses if he can arrange for at least 15 students to participate.**

The teacher must go through the same processes as any non-employee community member. Advertising for the opportunity may not be done during work time. Flyers and brochures may only be posted on community boards in the same way any community events are posted. A building use permit and applicable fees are required for informational sessions conducted on District sites and after work hours. District email, copiers, materials or other resources may not be used to plan or promote the trip.

**4. A staff member uses the District's contract to purchase a computer.**

## Financial Procedures for Schools and Departments FY16

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The staff member may not purchase a personal computer using the district's contract. This is avoiding a financial detriment since the price the District pays is lower.

- 5. An employee attends a conference and wins a raffle drawing. The prize is a laptop computer.**  
This is considered a gift and exceeds the \$50 limit. The employee must either decline the gift or give it to the school or department.
- 6. A teacher receives flowers for her birthday (\$30 value) and a \$40 restaurant gift for teacher appreciation week from the same family.**  
A teacher gives grades to a student and has an administrative relationship with the family and may not receive gifts valuing over \$50 in a calendar year.
- 7. A parent volunteers hours in the classroom, and her employer gives a donation to the school for each hour donated. The parent would like to have the donation credited to his specific student's fundraising account for a school sponsored trip.**  
The donation is given for the benefit of the school, and not for the benefit of the individual student. The donation should be used for the school or classroom and not for the individual student's benefit.
- 8. Athletic family passes are given to coaches and athletic directors from OSAA. The annual pass is valued at \$50.**  
The coaches and athletic directors would be allowed to accept the OSAA gift as long as they do not receive any other gift from OSAA during the calendar year. The annual gift limit is \$50.
- 9. A staff member is offered a trip to look at a manufacturing plant or to see a particular technology in operation by the company selling the product.**  
The employee should not accept the offer. This might be considered a gift, as a personal benefit, such as air miles, extracurricular activities, or meals and entertainment that exceeds the district's guidelines, may result from the trip. In any case, this may have the appearance of violating state and district purchasing rules. Very limited exceptions for essential district business purposes may be allowed with board approval and the funding for the trip must flow through the district.
- 10. A staff member attends a conference in Texas and decides to extend the trip for an extra week using vacation to visit family that lives in the same town.**  
Any and all expenses incurred as a result of the employee's extra stay must be paid by the employee. If the cost for the employee's airfare would increase due to the employee staying the week for personal business, the employee would need to pay the additional cost.
- 11. A staff member is invited by an outside organization to make a presentation or participate in honorary work. There is no possible future purchasing decision by the district related to this organization. The organization pays the individual's expenses.**  
The employee's costs of travel, meals, and entertainment must comply with district spending limits. If this is not official district work the employee may be reimbursed by the outside organization. If it occurs during official district travel, the outside organization must reimburse the district (State Accounting Manual).
- 12. A staff member receives delivery of personal items to a district address.**  
District resources may not be used for personal benefit; it is a misuse of public assets. This is also a private activity that creates a conflict between the district's interests and personal interests.

## **BUDGETING AND ACCOUNTING GUIDE**

Questions? Contact Budget at x 7624 or by email at [budget@4j.lane.edu](mailto:budget@4j.lane.edu)

### **Fund Accounting**

A **fund** is a fiscal and accounting entity with a self-balancing set of accounts recording cash and other financial resources together with all related liabilities and residual equities or balances and changes therein, which are segregated for the purpose of carrying on specific activities or attaining certain objectives in accordance with special regulations, restrictions, or limitations.

**The District manages the following Funds:**

#### **Governmental Funds**

- The **General Fund** is the District's primary operating fund. It accounts for all financial resources except those required to be accounted for in another fund. Most staff are budgeted in the General Fund.
- The **Debt Service Fund** accounts for the resources accumulated and payments made for principal and interest on long-term general obligation debt and pension debt of governmental funds.
- The **Capital Projects Fund** accounts for resources accumulated and payments made for the acquisition and improvement of sites, construction and remodel of facilities.
- The **Federal, State and Local Programs Fund** (Special Revenue Fund) accounts for resources acquired and payments made for federal, state and local grants (i.e. Title I, Eugene Education Fund, etc.).
- The **Nutrition Services Fund** (Special Revenue Fund) accounts for revenue and expenditures of the District's food programs. Principal revenue sources are cash sales of food and subsidies under the National School Lunch Act.
- The **School Resources Fund** (Special Revenue Fund) accounts for fundraising and student fees designated for extracurricular activities and projects and for the special reserve funds for schools and departments.

#### **Proprietary Funds**

- The **Insurance Reserve Fund** (Internal Service Fund) accounts for the majority of the District's insurance functions, including employee benefit plans and property and liability insurance. The fund is financed primarily by interfund charges and interest earnings.
- The **Postemployment Benefits Fund** (Internal Service Fund) accounts for the receipt and disbursement of postemployment benefits.

#### **Public Funds**

**All revenues and expenditures in the above funds are considered *public funds* and are subject to many laws regarding purchasing and documentation.** To ensure good stewardship, use of these monies must be well-documented and closely controlled. If you would like assistance in determining the appropriateness of an expenditure or documentation, contact Financial Services at x 7600, or email: Accounting ([accounting@4j.lane.edu](mailto:accounting@4j.lane.edu)) or Budget ([budget@4j.lane.edu](mailto:budget@4j.lane.edu)).

## Financial Procedures for Schools and Departments FY16

### 2015–16 BUDGET PREPARATION BY FUND

HOW ALLOCATED	WHEN ALLOCATED	SPENDING INFORMATION	REQUIREMENTS/OTHER	WHO BUDGETS
<b>100: GENERAL FUND</b>				
Per pupil allocations	Part of discretionary budget	Supplies, textbooks, repairs, field trips& equipment <i>(for both regular &amp; special ed.)</i>		Schools
Flat grants		Advisory council supplies, small remodel projects, secondary intramurals and athletics, vehicle supplies, and Career Center funds.		
Custodial and maintenance supplies	Part of discretionary budget	Based on building square footage and student enrollment. To be spent for purposes allocated.		Belinda Wilton, Facilities <i>wilton@</i>
Over enrollment Allocation	October–November	Per pupil allocation for supplies and equipment related to unanticipated enrollment increases.		Financial Services <i>budget@</i>
Ratio staffing	In budget process; part of staffing allocation	Regular staffing and benefits.		
Targeted funding	In budget process; part of staffing allocation	See "Targeted Funding Allocations" in 2015–16 Targeted Funding Allocations (March 5, 2015)		
General Fund Savings	Year-end balances may qualify for transfer to the Special Purpose Reserve Fund.			
<b>290: SPECIAL PURPOSE RESERVE FUND</b> <i>(Funds remaining carry into following year)</i>				
Based on carry over from previous years by each school or department	September	Instruction related staffing, services, projects, property and equipment.		Financial Services <i>budget@</i>
<b>260: FEDERAL, STATE, LOCAL PROGRAMS</b> <i>(Funds carry into following year, if allowed by grant)</i>				
Grants	As awarded	Specified by grant		<i>grants@</i>
Title Grants	As awarded	Specified by grant		David Pierpoint, Instruction <i>pierpoint_d@</i>
<b>270: EUGENE EDUCATION FUND (EEF) GIFTS</b> <i>(Funds carry into following year)</i>				
Grants	Quarterly	Specified by donor; budget as salary only or any educational use		<i>grants@</i>
<b>275: EUGENE EDUCATION FUND (EEF) GRANTS</b> <i>(Funds must be expended by June 30; remaining funds are returned to EEF)</i>				
Grants	Quarterly	Specified by gift or grant		<i>grants@</i>

## What's in My School Budget?

If you work in a school, your budget looks like this. The portions of your budget that you are held accountable for are based on non-FTE allocations, even though some of those dollars are used for staff-related costs.

### GENERAL FUND (Fund 100)

#### Staffing FTE Allocation

- Licensed
  - Based on projected enrollment adjusted to reflect student needs
  - Program staffing
- Classified
  - Staffing based on enrollment
  - Program staffing

#### Discretionary Funds

- Per pupil allocations and other grants to pay for supplies, materials, services and *some staffing costs* such as
  - Overtime
  - Temporary help
  - Extended contracts
  - Substitutes
  - Supervision
- Targeted funding
- For staffing, professional development, or materials and supplies.

### SPECIAL PURPOSE RESERVE (Fund 290)

- Dollar amounts transferred from the General Fund in previous years
- Formerly Fund 210 and only for Schools and Departments
- May be used for instruction related services, projects, property and equipment

### GRANTS (Fund 260)

- Allocations for staffing, materials and supplies, as specified by grant
- Staffing charged at actual costs

### EUGENE EDUCATION FUND (Fund 270 and 275)

- Allocations for staffing, materials and supplies, as specified by donor (Fund 270) or by grant (Fund 275)
- Staffing charged at average costs

## What's in My Department Budget?

If you work in a department, the budget looks like this. Departments are held accountable for all allocations, regardless of whether funds are used for staffing or materials, supplies or services.

### GENERAL FUND (Fund 100)

- Staffing dollars budgeted as FTE, at the same levels and job classifications as the previous year (unless additional FTE were approved during the budget process).
- Costs related to FTE added by department (not through budget process) must be paid for out of existing department funds.
- Dollars allocated for non-FTE costs are provided at the same level as previous year, unless they have been adjusted to pay for department-initiated staff conversions.

### SPECIAL PURPOSE RESERVE FUND (Fund 290)

#### Discretionary - \$

- Dollar amounts transferred from the General Fund in previous years
- Formerly Fund 210 and only for Schools and Departments
- May be used for instruction related services, projects, property and equipment

### GRANTS (Fund 260)

- Allocations for staffing, materials and supplies, as specified by grant
- Staffing charged at actual costs

### CAPITAL EQUIPMENT RESERVE FUND (Fund 490)

#### Discretionary - \$

- Dollar amounts transferred from the General Fund in previous years
- Formerly Fund 210 and only for Technology, Facilities, and Transportation Departments
- Allocations for critical equipment needs approved by the superintendent's cabinet

### EUGENE EDUCATION FUND (Fund 270 and 275)

- Allocations for staffing, materials and supplies, as specified by donor (Fund 270) or by gift or grant (Fund 275)
- Staffing charged at average costs

**Chart of Accounts**

**Posting Account Numbers**

Funds received and expended by the District are recorded in the financial systems through the use of Posting Accounts. Each posting account is represented by three segments:

1. Accounting Units. Accounting units are constructed through the use of four parts: Fund (3 digits), Cost Center (3 digits), Function (4 digits), and Area or Grant (3 or 5 digits).
1. Accounts. Accounts are placed after the Accounting Unit to indicate the type of expenditure, revenue, asset, or liability to be recorded. Expenditure accounts are 3 digits and all other accounts are 5 digits.
2. Sub-Accounts. Sub-Accounts are three digits and allow for grouping within an account.

Together, the Posting Account Number is constructed as outlined below and detailed in the following sections. *Note that Cost Center, Function, Area, Grant, Account, and Sub-Accounts are used in the same way regardless of the fund(s) in which they are used.*

	Accounting Unit				Account	Sub-Acct
	Fund	Cost Center	Function	Area or Grant	Account	Optional
# digits	xxx	xxx	xxxx	xxx or xxxxx	xxx or xxxxx	xxx
Example	100	104	1111	050	410	000
	General	Adams	Regular Elementary	Regular Instruction Elementary	Supplies	none

**Site Defined Sub-accounts**

- Sub-accounts can be added to existing accounts
- 901 through 959 (up to 49 sub-accounts for each account, except sub accounts 931-933, 944-949 and 954 which are designated for use by Financial Services and will not be available for use by schools or departments).

For more information regarding the chart of accounts, please refer to the Chart of Accounts Manual (<http://www.4j.lane.edu/finance/intranet/forms-documents/>).

**Discretionary Budget**

**Overview of Discretionary Budget**

- Mainly per pupil allocation; includes other allocations of custodial supplies, flat grants, small school funding
- Targeted funding allocations can be converted to staffing
- Budget guidelines suggest appropriate uses
- Actual spending is at principal's discretion
  - Subject to legal uses of public funds.
  - Subject to district spending policy and procedures.

## Financial Procedures for Schools and Departments FY16

- Schools monitor budget vs. actual for total discretionary budget
  - Use the “Current School Financial Review” report
  - Budget may be managed account by account or only to the bottom line
  - Projected year-end balance may be transferred to the Special Purpose Reserve Fund

### Lawson Financial Reports

#### How to Find Lawson Reports

Below is a screenshot showing how to find financial reports in Lawson, under Reporting. As indicated by (2) below, selecting the box to the left of the report name and then clicking on (3) Add to Favorites will add frequently used reports to the Favorites list. This will save time in finding reports.

**You can create your own short list of the reports you frequently use:**

The screenshot shows the 'Reporting' section of the Lawson system. A list of reports is displayed with columns for 'Report Name' and 'Description'. The report '4JGL001' is selected, and its checkbox is checked. Callouts provide instructions: (1) Sort reports alphabetically by clicking here. (2) Mark the box next to the report(s) you frequently use. (3) Click here. (4) The next time you access 4J Custom Reports, click on Favorites to access your short list.

Report Name	Description
<input type="checkbox"/> 4JBN305 [Details]	Create Employee Group B-CLAS-10 Upload
<input type="checkbox"/> 4JPR312 [Details]	Create New Hires Workbook
<input type="checkbox"/> 4JPR303 [Details]	Create Substitute Dues Upload File
<input type="checkbox"/> 4JPR316 [Details]	Create Workman's Comp Holiday Ticket Upload
<input type="checkbox"/> 4JGL001d [Details]	Current Department Financial Review
<input type="checkbox"/> 4JGL012a [Details]	Current Detail by Area
<input type="checkbox"/> 4JGL012b [Details]	Current Detail by Grant
<input type="checkbox"/> 4JGL006a [Details]	Current Financial Report
<input type="checkbox"/> 4JGL006b [Details]	Current Financial Report For Grants
<input type="checkbox"/> 4JGL304 [Details]	Current Financial Statement Detail by Cost Center ....
<input checked="" type="checkbox"/> 4JGL001 [Details]	Current School Financial Review

#### Report Overview: Current School Financial Review

- A financial report for use by schools (4JGL001)
- International High Schools use a similar Alt HS Current Financial Review (4JGL001b)
- Amounts reported under Fund 100 reflects discretionary account only
  - Discretionary Subtotal
  - General Fund (Fund 100) including any Targeted Funding and Academy Allocations
  - Excludes salaries/benefits not controlled by school
  - Eligible for Special Purpose Reserve Fund Transfer



## Financial Procedures for Schools and Departments FY16

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- Instruction Department projects
- Includes sub account 899 Literacy
- Includes sub account 849 Avid Program
- Includes sub account 881 Targeted Funding
- Separate Line for 31211 (reimbursable) accounts
- Amounts reported under other Funds
  - 270 – Eugene Education Fund (EEF) Gifts
  - 275 – Eugene Education Fund (EEF) Grants
  - 290 – Special Purpose Reserve Fund (formerly Fund 210-Capital Equipment Fund and only for Schools and Departments)
- **Report is complete as of the prior night's processing**

### **Report Overview: Current Financial Report**

- A financial report for use by departments instead of the Current School Financial Review (4JGL006a)
- Includes all salaries and benefits
- Provides totals by Fund
  - 100 – General Fund (remaining budget is eligible for Special Purpose Reserve Fund Transfer)
  - 260 – Federal and State Programs (Grants)
  - 270 – Eugene Education Fund (EEF) Gifts
  - 275 – Eugene Education Fund (EEF) Grants
  - 290 – Special Purpose Reserve Fund (formerly Fund 210-Capital Equipment Fund and only for Schools and Departments)
  - 490 – Capital Equipment Reserve (formerly Fund 210-Capital Equipment Fund and only for Technology Department, Facilities, and Transportation)
- **Report is complete as of the prior night's processing**

### **Considerations for Understanding Reports**

- Items may not be included in report totals yet, such as:
  - Warehouse orders not yet shipped
  - Actual amounts that vary from Purchase Order amounts
  - VISA card charges that have not been processed
  - Amounts charged to the reimbursable accounts that will be charged to discretionary accounts (100xxx 31211)
  - Pending Journal Entries (in the encumbrance column) may be changed before being approved
  - Pending Budget Transfers are not included

### Example: How to Create a Financial Report for School

#### Create Report in Lawson

1. Log in to Lawson.
2. Choose **Current School Financial Review (4JGL001)** from 4J Custom Reports on the 4J Reports bookmark.
  - Alternative High Schools should select the **Alternative High School Current School Financial Review (4JGL001b)**.
3. Enter the **fiscal year** (e.g., 2016).
4. Enter the 3-digit **cost center** assigned to the school.
5. Choose whether to include or exclude accounts with all zero balances. Click OK.

**An example of the Current School Financial Review is provided after this section.** There is also a menu choice in the 4J Reports bookmark for the Current Financial Report, but that report contains more than just discretionary accounts. This is a “current” report and includes all transactions that were released through the previous night.

#### How to Review Available Funds

Included on this report are the General Fund, Special Purpose Reserve Fund, and Eugene Education Fund. The accounts included are the “discretionary” accounts for which the school is financially responsible. Non-discretionary salary and benefit accounts are excluded. Separate subtotals in the General Fund are given for special purpose accounts, including the 31211 Reimbursable. There is an option of including the accounts that have no activity for the year.

Locate the **Discretionary Subtotal** line in the report. If the amount in the **Balance** column is positive, the General Fund discretionary budget has available funds. Keep informed about how the balance changes month to month to prevent overspending.

#### Tracking Expenditures and Overspending

Responsibility for **expenditure tracking is the bottom line for each fund and not on an account-by-account basis**. For example, if the school is over budget in supplies and under budget in postage, there are no repercussions as long as the bottom line is not overspent. It is a site-based decision whether to: 1) monitor actual spending against the budget for each account; 2) ignore overspending by account if it is less than a predetermined amount set by the principal or administrator (for example, \$100); or 3) simply focus on the bottom line.

Any overspending of the discretionary General Fund accounts, in total, will have to be repaid in the following year or charged to other funds if appropriate money is available.

#### Considering Year-end Expenditures and Balances

As the end of the fiscal year approaches, any balance expected to be left over may be transferred to the Special Purpose Reserve Fund (Fund 290). Make sure to consider expenditures that may post after year-end as well as open purchase orders that may get cancelled or be invoiced at a different dollar amount than what was **encumbered**. Examples of expenditures that may post after year-end include print orders, postage slips, invoices for goods and services received before year end, VISA card charges, bus trips, district travel, etc.

## **Financial Procedures for Schools and Departments FY16**

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At the beginning of June, inform Financial Services of the requested amount to transfer to the Special Purpose Reserve Fund. Principals and secretaries should review what is still outstanding and discuss expected new expenditures not yet posted.

Subsequent to Board approval, the Special Purpose Reserve Fund transfer will carry forward the remaining balance in the General Fund budget at year-end and will be available in the Special Purpose Reserve Fund the following year, typically by October.

# Financial Procedures for Schools and Departments FY16

## Sample Current School Financial Review Report

Eugene Public Schools  
ADAMS  
8/27/2013 15:25

GENERAL LEDGER SYSTEM  
Current School Financial Review for ADAMS  
Fiscal Year 2014

43GL001  
(Username here)  
Page 1

Selection Criteria  
Fiscal year: 2014  
Cost Center: 104  
Incl zero balance accts: N

Accounting Unit	Acct	Sub Acct	Account Description	Budget	Encumbrance	Expenditure	Balance
1001041111050	410	0	ADAMS GEN K-5 REG:SUPPLIES	12,834.00	1.00	228.36	12,604.64
1001041111050	410	990	ADAMS GEN K-5 REG:SUPPLIES CIP SAVINGS CON	0.00	148.95	0.00	-148.95
1001041280000	131	0	ADAMS GEN ALT ED:LICENSED SALARIES-ADD'L	1,000.00	0.00	0.00	1,000.00
1001041280000	211	0	ADAMS GEN ALT ED:PERS EMPLOYER CONTRIBUTION	337.50	0.00	0.00	337.50
1001041280000	220	0	ADAMS GEN ALT ED:SOCIAL SECURITY ADMINISTRATION	76.50	0.00	0.00	76.50
1001041280000	231	0	ADAMS GEN ALT ED:WORKER'S COMPENSATION	11.20	0.00	0.00	11.20
1001041280000	232	0	ADAMS GEN ALT ED:STATE UNEMPLOYMENT INSURANCE	5.00	0.00	0.00	5.00
1001042222000	410	0	ADAMS GEN LIBRARY:SUPPLIES	100.00	0.00	0.00	100.00
1001042223000	410	0	ADAMS GEN AV SVCS:SUPPLIES	3,700.00	0.00	0.00	3,700.00
1001042223000	470	0	ADAMS GEN AV SVCS:COMPUTER SOFTWARE	1,000.00	0.00	0.00	1,000.00
1001042223000	480	0	ADAMS GEN AV SVCS:COMPUTER HARDWARE	500.00	0.00	0.00	500.00
1001042240000	121	0	ADAMS GEN INST STAFF DEV:SUBS-LICENSED SALARIES	1,000.00	0.00	0.00	1,000.00
1001042240000	122	0	ADAMS GEN INST STAFF DEV:SUBS-CLASSIFIED SALARIES	1,000.00	0.00	0.00	1,000.00
1001042240000	211	0	ADAMS GEN INST STAFF DEV:PERS EMPLOYER CONTRIBUTION	76.20	0.00	0.00	76.20
1001042240000	220	0	ADAMS GEN INST STAFF DEV:SOCIAL SECURITY ADMINISTRATION	153.00	0.00	0.00	153.00
1001042240000	231	0	ADAMS GEN INST STAFF DEV:WORKER'S COMPENSATION	22.40	0.00	0.00	22.40
1001042240000	232	0	ADAMS GEN INST STAFF DEV:STATE UNEMPLOYMENT INSURANCE	10.00	0.00	0.00	10.00
1001042240000	244	0	ADAMS GEN INST STAFF DEV:INSURANCE BENEFITS	43.40	0.00	0.00	43.40
1001042411000	124	818	ADAMS GEN PRINCIPALS:TEMP-CLASSIFIED SALARIES WORKSTUDY	2,450.00	0.00	0.00	2,450.00
1001042411000	241	0	ADAMS GEN PRINCIPALS:PROFESSIONAL DUES	1,700.00	0.00	0.00	1,700.00
1001042411000	322	0	ADAMS GEN PRINCIPALS:REPAIRS & MAINT.SVCS. (ON CONTRACT)	4,600.00	0.00	7.00	4,593.00
1001042411000	324	0	ADAMS GEN PRINCIPALS:RENTALS	3,200.00	0.00	0.00	3,200.00
1001042411000	345	0	ADAMS GEN PRINCIPALS:FOOD/MEALS/SNACKS	600.00	0.00	0.00	600.00
1001042411000	346	0	ADAMS GEN PRINCIPALS:IN-DISTRICT EXPENSE	100.00	0.00	0.00	100.00
1001042411000	353	0	ADAMS GEN PRINCIPALS:POSTAGE	1,200.00	0.00	0.00	1,200.00
1001042411000	410	0	ADAMS GEN PRINCIPALS:SUPPLIES	200.00	0.00	0.00	200.00
1001042490000	319	881	ADAMS GEN OTHER SCH ADM:OTHER INSTRUC.PROF. & TECH.SERVICE TARGETED FUN	10,205.00	0.00	0.00	10,205.00
1001042546000	410	0	ADAMS GEN BLDG MAINT:SUPPLIES	5,500.00	250.00	325.65	4,924.35
			<b>Discretionary Subtotal:</b>	<b>51,624.20</b>	<b>399.95</b>	<b>561.01</b>	<b>50,663.24</b>
100104	31211	0	ADAMS GEN:REIMBURSABLE ACCOUNT	0.00	0.00	370.28	370.28
				<b>0.00</b>	<b>0.00</b>	<b>370.28</b>	<b>370.28</b>
			<b>** Fund 100 Total:</b>	<b>51,624.20</b>	<b>399.95</b>	<b>931.29</b>	<b>51,033.52</b>

1 The "Current School Financial Review" only includes discretionary accounts. The "Current Financial Report" includes ALL of your cost center's accounts.

2 "Current" includes all released transactions to date (updated nightly)

3 Encumbrances include open purchase orders and "released" journal entries. Actual amounts may vary.

4 A positive balance in the discretionary subtotal may be transferred to the Special Purpose Reserve Fund after year-end.

5 The reimbursable account (what Student Body owes to the District) is listed separately. You may have other discretionary accounts that are not listed on this report. Only accounts with activity are listed.

Other Funds are shown in separate sections on this report. See the following pages for more information.

### Reimbursable Account (31211)

The Reimbursable Account provides a mechanism to record expenditures lacking documentation for posting to other funds (e.g. Visa charges), or that will be paid with Student Body or other funds.

#### Monthly Reconciliation of Reimbursable Account (31211)

- **This account should be reconciled monthly.** Review after e-mail from Financial Services indicates month is closed to ensure all transactions are complete.
- **Pay actual charges only.**
  - Use the Expenditure column balance to determine the amount owed.
  - Amounts in the encumbrance column may be different than the actual amount when the invoice is received.
  - If VISA charges are posted, make sure they clear out after distribution is submitted to Financial Services.
- **One check can be sent for multiple charges.**
  - When sending in one check for multiple items **always include the Account Detail by Account** for the 31211 account and indicate the items paid.
  - Indicate the 31211 account by including the full account, i.e. 100xxx 31211.
  - If multiple Student Body accounts need to be charged, distribute among the accounts when you enter the check into the Student Body system.
  - To help track what 31211 charges have been paid, consider including an identifier like the transaction number in the comment section when recording the check in Student Body.
- **Check prior year balance for new charges**
  - Most entries are in by August, but corrections can be made through the District audit period on a case-by-case basis.
  - In Account Detail by Account Report, enter fiscal year 2015, enter accounting unit 100xxx, enter account 31211.

#### How to Determine the Amount Owed to the District

Use the **Current School Financial Review (4JGL001)**, **Alt High School Current School Financial** or **Current Financial Review** to review the 31211 Reimbursable account.

An example of the Reimbursable Account is printed on the previous page (see \_\_\_\_\_ on the Sample Current School Financial Review Report). Four items of interest are noted on that report:

1. This is a revenue account for the District.
2. All other accounts on this report are expenditure accounts.
3. This account has **no budget** for any school or department.
4. A positive amount in the **Expenditure** column at the end of the report means you owe the district funds.

Any balances owed in the Reimbursable Account need to be paid before fiscal year end or they may be moved to an expenditure account in your discretionary budget. Contact accounting for help reconciling this account if needed.

**Special Purpose Reserve Fund (Fund 290)**

The Special Purpose Reserve Fund (Fund 290) provides a mechanism to save and accumulate General Fund balances on an annual basis.

- It is not a “spend-it or lose-it” type of fund; the balance carries over to the subsequent year.
- Funds can be added to the Special Purpose Reserve Fund annually by not spending all the discretionary dollars in the General Fund. **Financial Services will notify sites in May of the deadline to make this request.**
- Subsequent to Board approval, the Special Purpose Reserve Fund transfer will reduce the General Fund budget authority and move it to the Special Purpose Reserve Fund in the following year.
- Carryover funds are typically entered by September after the District’s audit is complete.
- Funds can be used to support instruction-related services, projects, property and equipment.

**How to Find Special Purpose Reserve Fund Balance**

1. Log in to Lawson.
2. Choose **Current Financial Report** from the 4J Reports bookmark.
3. Enter the **fiscal year** (e.g., 2015 or 2016).
4. Enter **290** in the Fund field.
5. Enter your 3-digit **cost center**.
6. Enter an asterisk for Function, Area, Account from 0 to 999, and Sub Accounts from 0 to 9999.
7. Choose whether to include or exclude accounts with all zero balances. Click OK.

**How to Read the Current Financial Report for Special Reserve Funds**

1. This fund’s budget is loaded into the following accounts depending on whether they are for schools or departments:  
 Schools:       290 ccc 2411 000 480 0  
 Departments: 290 ccc ffff 000 480 0
2. A positive amount in the **Balance** column at the end of the report means you have money available to spend.
3. Any overspending in the Special Purpose Reserve Fund needs to be moved by journal entry to another fund.

**Example of report:**

Eugene Public Schools Financial Services 6/20/2014 10:25	GENERAL LEDGER SYSTEM Current Financial Report Fiscal Year 2014	4JGL006A mcMahon_t Page 1
Selection Criteria		
Fiscal year:	2014	
Fund:	290	
Function:	*	
Cost Center:	557	
Area:	*	
Account range:	0 - 999	
Sub account range:	0 - 9999	
Incl zero balances:	N	

Accting Unit/Acct/SubAcct	Account Description	Budget	Encumbrance	Expenditure	Balance
2905572411000 460 0	MONRO SP/P RES PRINCIPALS:NON-CONSUMABLE SUPPLIES	0.00	341.51	5,645.05	-5,986.56
2905572411000 460 0	MONRO SP/P RES PRINCIPALS:COMPUTER HARDWARE	29,249.11	0.00	-896.00	30,147.11
	* <b>Total fund 290</b>	<b>29,249.11</b>	<b>341.51</b>	<b>4,747.05</b>	<b>24,160.55</b>
	** <b>Grand Total:</b>	<b>29,249.11</b>	<b>341.51</b>	<b>4,747.05</b>	<b>24,160.55</b>

\*\*\*\*\* End of Report \*\*\*\*\*

## Financial Procedures for Schools and Departments FY16

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### Calculating Special Purpose Reserve Fund Transfer

1. Work in whole dollar amounts only; no cents.
2. Print and review the discretionary account balances using the "Current School Financial Review" for schools or "Current Financial Review" for departments.
3. Estimate charges or credits that have not been posted yet to accounts, and subtract them from the "Balance" column to determine the total transfer amount (see added information circled on report below).

1009992490897	319	0	EXAMPLE SCHOOL GEN OTHER SCH AD:OTHER I	26,120.00	0.00	0.00	26,120.00
1009992544000	522	0	EXAMPLE SCHOOL BUILDING MAI:BLDG. IMPRO	1,875.00	0.00	0.00	1,875.00
1009992548000	410	0	EXAMPLE SCHOOL GEN BLDG MAINT:SUPPLIES	6,392.00	0.00	5,960.95	431.05
Discretionary Subtotal:				126,085.00	6,038.99	59,748.44	60,297.57
							-34,500.00
Example School estimated additional expenses							25,798.00
Example School amount to transfer							

(Round the cents.)

4. In estimating additional charges or credits, be sure to consider the following:
  - Review outstanding encumbrances to determine if these will be paid, canceled, etc. (For help canceling purchase orders, e-mail [purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu).)
  - Estimate or allow for May and/or June transactions that may not be posted until after June 30, i.e., VISA, postage and printing, transportation charges, and other billings, including staff.
  - If you have staffing transactions that could not be moved via a journal entry between discretionary and non-discretionary it will be necessary to take those into account as well. Please email [budget@4j.lane.edu](mailto:budget@4j.lane.edu) if you have questions.
4. Email Budget ([budget@4j.lane.edu](mailto:budget@4j.lane.edu)) with the transfer amount requested.
5. No adjustments will be made to the school's financial records until the summer when the school year is closed out and all expenditures are entered.

### **Capital Equipment Reserve Fund (Fund 490)**

This fund applies only to the Technology, Facilities, and Transportation Departments. Please contact Budget directly for instructions on calculating the Capital Equipment Reserve transfer.

#### **Using Targeted Funding**

In addition to the regular staffing allocation and discretionary budget, schools receive a targeted funding allocation. This funding can be used for staffing as well as for other types of expenditures.

- Staffing purchased with any source of Targeted Funding reduces the Discretionary materials and supplies allocation.
- Human Resources must be notified of any changes in staffing plans, on appropriate forms.
- Materials and supplies allocations are budgeted in 100 ccc 11xx aaa 319 881

#### **Process for Allocating Targeted Funding**

- In the spring of each year, during the budget process, the Superintendent's Staff sets the level of targeted funding allocations.
- The amounts of funding allocations are provided to schools as part of the staffing packet.
- Using the staff conversion table provided in the staffing packet, schools can convert certain types of these funds to FTE as part of their staffing plans.
- As these funds have been identified by Financial Services as converted to FTE, budget authority is moved from the school's discretionary budget to its personnel budget.
- Subsequent requests for FTE conversions are to be submitted with an Employee Change Form to Human Resources. Financial Services moves budget authority from the school's discretionary budget to its personnel budget once requests are approved (joint approval—Human Resources and Financial Services).

A summary of 2015–16 Targeted Funding Allocations is provided in the next table.



## Financial Procedures for Schools and Departments FY16

### 2015-16 Targeted Funding Allocations (March 5, 2015)

Eugene 4J School District 2015-16 Targeted Funding Allocation March 4, 2015				
	TARGETED FUNDING			
	Budget \$ Allocation 2014-15	Needs Wtd Enrollment Allocation Factor	Budget \$ Allocation 2015-16	Year-Over-Year Change \$ Allocation
<b>Elementary</b>				
Adams	\$10,375	6.0%	\$11,130	\$755
Awbrey Park	\$10,041	5.6%	\$10,329	\$288
Bertha Holt	\$14,990	8.0%	\$14,682	(\$308)
Buena Vista	\$10,279	5.8%	\$10,708	\$429
Camas Ridge	\$9,801	5.8%	\$10,668	\$867
Cesar Chavez	\$12,244	6.3%	\$11,692	(\$552)
Charlemagne	\$7,557	4.5%	\$8,226	\$669
Corridor	\$6,925	3.8%	\$6,996	\$71
Edgewood	\$9,609	5.0%	\$9,261	(\$348)
Edison	\$8,939	4.8%	\$8,861	(\$78)
Family School	\$4,460	2.4%	\$4,504	\$44
Gilham	\$11,717	6.9%	\$12,743	\$1,026
Howard	\$9,547	5.5%	\$10,047	\$500
McCormack	\$9,304	5.2%	\$9,515	\$211
River Road	\$9,389	5.3%	\$9,763	\$374
Spring Creek	\$9,545	5.0%	\$9,287	(\$258)
Twin Oaks	\$6,122	3.1%	\$5,793	(\$329)
Willagillespie	\$13,497	6.8%	\$12,596	(\$901)
Yujin Gakuen	\$7,264	4.0%	\$7,344	\$80
Total - Elementary	\$181,605	100.0%	\$184,145	
<b>Middle</b>				
Arts and Technology	\$15,543	9.4%	\$18,380	\$2,837
Cal Young	\$26,930	13.9%	\$27,142	\$212
Kelly	\$22,829	11.2%	\$21,783	(\$1,046)
Kennedy	\$24,505	12.5%	\$24,330	(\$175)
Madison	\$24,827	12.7%	\$24,725	(\$102)
Monroe	\$26,395	13.5%	\$26,196	(\$199)
Roosevelt	\$28,711	15.2%	\$29,540	\$829
Spencer Butte	\$22,169	11.6%	\$22,499	\$330
Total - Middle	\$191,909	100.0%	\$194,595	
<b>High</b>				
Churchill	\$57,822	21.8%	\$58,714	\$892
Churchill - I.H.S. (1)	\$1,361		\$1,380	\$19
North Eugene	\$61,991	21.2%	\$57,123	(\$4,868)
Sheldon	\$68,890	25.3%	\$68,043	(\$847)
Sheldon - I.H.S. (1)	\$1,378		\$1,397	\$19
South Eugene	\$64,888	25.3%	\$68,064	\$3,176
South Eugene - I.H.S. (1)	\$1,378		\$1,397	\$19
ECCO	\$11,776	6.4%	\$17,135	\$5,359
Total - High	\$269,484	100.0%	\$273,253	
<b>GRAND TOTAL</b>	<b>\$642,998</b>		<b>\$651,993</b>	

(1) - International High School allocation dollar amounts held at 2014-15 allocation levels, plus 1.4% increase.

## Financial Procedures for Schools and Departments FY16

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### 2015-16 Staff Conversion and Costing Table (July 1, 2015)

Below are average staff salary, payroll and benefits costs to use for calculating additional staffing from grants, donated funds, or conversions of materials and supplies budgets to FTE, and for converting licensed FTE and classified hours. Amounts can be used for both conversion purposes and costing additional staffing. **Classified conversions are stated in terms of hours and not FTE.**

Remember that there is a 10% equity surcharge on donated funds earmarked for staffing.\*

*These rates may be used for all staffing conversions.*

#### **AVERAGE STAFFING COSTS**

##### Licensed Staff (190 days)

Regular Staff .10 FTE = \$9,906

Salary Account	111	\$6,070
Fixed Costs	200s	\$2,302
Fringe Benefits	240s	\$1,534

Extended Contract 1 day = \$428

Salary Account	131	\$318
Fixed / Fringe Costs	200s	\$110

Substitute Teacher 1 day = \$219

Salary Account	121	\$174
Fixed / Fringe Costs	200s	\$45

**Classified - Grade 10 and lower (average of 207 days)** 1 Hour = \$6,777

Salary Account	112	\$3,651
Fixed Costs	200s	\$1,293
Fringe Benefits	240s	\$1,833

**Classified - Grade 11 and higher (average of 222 days)** 1 Hour = \$7,674

Salary Account	112	\$4,313
Fixed Costs	200s	\$1,528
Fringe Benefits	240s	\$1,833

\* Please contact a member of the Budget team ([budget@4j.lane.edu](mailto:budget@4j.lane.edu)) for help in costing additional staffing or converting one type of staffing to another, e.g., licensed to classified. Financial Services will work with you to determine the amount that needs to be billed to your school for staffing purchased with outside funds.

According to Board policy, staff positions funded through donations will be created only after the funds have been received by the district.

For staffing funded through Eugene Education Fund (EEF) grants, please notify the Grants Coordinator ([grants@4j.lane.edu](mailto:grants@4j.lane.edu)) of your budget decisions, in addition to your Human Resources representative.

## Financial Procedures for Schools and Departments FY16

### 2015-16 Staff Conversion and Costing Table for Payroll and Employee Benefits

*For budgeting, converting supply and materials budgets to FTE, and projecting additional staff costs (i.e., targeted funding).*

Description	Account	Licensed (111, 123)	Classified (112)	Administrative (113)	Supervisory (114)	Professional (118)
PERS, OPSRP, IAP (Pick-Up)	** 211	25.67%	25.67%	25.67%	25.67%	25.67%
FICA	220	7.65%	7.65%	7.65%	7.65%	7.65%
Workers Comp (classroom, office)	* 231	0.90%	0.90%	0.90%	0.90%	0.90%
Unemployment	232	0.30%	0.30%	0.30%	0.30%	0.30%
District Retirement***		3.40%	0.90%	0.90%	0.90%	0.90%
<b>Payroll Costs</b>		<b>37.92%</b>	<b>35.42%</b>	<b>35.42%</b>	<b>35.42%</b>	<b>35.42%</b>
Insurance	** 244	\$14,260	\$14,480	\$14,230	\$14,230	\$14,230
Professional Development	241			\$1,700	\$1,200	\$1,200
TSA Contrib.	243	\$1,080	\$180	\$4,770	\$4,150	\$4,220
<b>Benefits</b>		<b>\$15,340</b>	<b>\$14,660</b>	<b>\$20,700</b>	<b>\$19,580</b>	<b>\$19,650</b>

Description	Account	Lcnd. Subs (121)	Class. Temp. (122, 124)	Extra Duty (15X)	Ext'd Contract / Overtime (131, 132)
PERS, OPSRP, IAP (Pick-Up)	** 211	11.20%	0.00%	25.67%	25.67%
FICA	220	7.65%	7.65%	7.65%	7.65%
Workers Comp (classroom, office)	* 231	0.90%	0.90%	0.90%	0.90%
Unemployment	232	0.30%	0.30%	0.30%	0.30%
Insurance	** 244	6.00%			
<b>Payroll Costs</b>		<b>26.05%</b>	<b>8.85%</b>	<b>34.52%</b>	<b>34.52%</b>

- \* Bus drivers / mechanics 5.20%
- Maintenance / warehouse 4.30%
- Cooks 3.80%

\*\* Insurance and PERS rates represent weighted average payments by group.

\*\*\* District retirement costs need to be calculated when estimating costs for all funds except the General Fund.

### Budget Transfers and Journal Entries

#### Budget Transfers (BT)

- Moves budget resources from one account to another, e.g. to transfer budget to sub-accounts
- **BTs cannot move resources from one fund to another fund**
- Entered using “Budget Transfer” on the “4J General Ledger” bookmark (FB40.1)
- Printed using “Budget Transfer Batch Listing” on the “4J Reports/4J Custom Reports” bookmark

#### Journal Entries (JEs)

- Moves actual expenditures from one account to another
- Examples of reasons to do a JE:
  - To correct airline tickets incorrectly charged to professional development
  - To correct bus trips charged to the wrong transportation account
  - To move textbook purchase from general fund to Special Purpose Fund
- Entered using “Journal Entry” on the “4J General Ledger” bookmark (GL40.1)
  - Enter comments and/or send backup to Financial Services to provide Financial Services with enough information to verify the entry
- Printed using “Journal Entry Listing” on the “4J Reports/4J Custom Reports” bookmark

### Record Retention

**Financial Services is the official record retention site for all financial information** other than Student Body, monthly leave reporting, and comp time.

**Schools** are the official record retention site for **Student Body records**

- Typical retention is 4 years
- Retention is 5 years for expenditures of federal funds, such as daycare accounted for in Student Body funds

**Schools** are the official record retention site for **monthly leave reporting and comp time records**

- Retention is 3 years.

## **SPENDING AUTHORITY AND CONTROLS**

Questions? Contact Purchasing at x 7620 or by email at [purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu)

### **IMPORTANT:**

- **Guidelines apply to spending for all funds.**
- **All revenues and expenditures in all funds are considered to be public funds and are subject to the requirements of Oregon Revised Statutes and 4J Board Policy.**
- **Without proper authority, the individual making the contract is personally liable (ORS332.075(2))**
- **Original signatures are required; signature stamps are not allowed for any use.**
- **Oregon Statutes require the School Board to approve all contracts. The Board may delegate authority and has delegated authority for contracts under \$150,000.**
- **Spending limits include all purchases from one vendor; splitting invoices is not allowed under state law (ORS279B.065(2)).**

### **Spending Guidelines Overview**

As a public entity, we are held to a high standard of stewardship for public resources. We each have a duty to care for the public trust. Moreover, our records can be subject to review, under the Oregon Public Records Law, at any time. We are required to “exercise prudent judgment so as to maintain proper stewardship of taxpayer dollars.”

Travel, meals, entertainment, food, and employee reimbursements are common areas for public scrutiny and investigation. The district needs to ensure that as many resources as possible are targeted toward the classroom. The following procedures will assist 4J staff who approve and monitor purchases in ensuring that expenditures are reasonable and comply with laws and policies. These procedures, such as travel per diems and documentation requirements, reflect practices that are required by law and are adopted throughout the U.S. by public organizations.

Principals, Directors, and other administrators, with the support of financial staff throughout the District, are responsible for ensuring that transactions are within the authorized spending limits and comply with all applicable laws, regulations, and policies.

### **Signing Authority**

Oregon law requires the School Board to approve all contracts or delegate the authority to do so. Without the proper authority, the individual making the contract is personally liable. The Board has **delegated authority for contracts under \$150,000 to Deputy Clerks and Finance Managers**. Signing a purchase order/contract without board delegated authority results in personal liability for payment. Signature stamps are not allowed for any use. Original signature on hardcopy document is recommended; scanned original signature may be accepted in most cases (contact purchasing as needed).

## Financial Procedures for Schools and Departments FY16

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All purchases and contracts require proper documentation of authorization. *Authorizing signature is defined as the authority to enter into and approve payment on contracts, contract amendments, and change orders obligating district funds*

### **Summary of Authorized Signers**

- **Only the Superintendent or a Deputy Clerk** has the authority to sign Intergovernmental Agreements (IGAs) regardless of dollar amount.
- **Only the Superintendent, Clerk, and Deputy Clerks** (Chief of Staff, Chief Financial Officer, Associate Director of Financial Services, and Director of Facilities) have authority **to sign contracts**, or otherwise obligate the district to expend funds or provide services.
- Purchasing reviews all Independent Contractor Agreements (ICAs) as prepared by school and department staff. Note there are two ICAs available online, \$600 or under and exceeds \$600. See <http://www.4j.lane.edu/finance/intranet/forms-documents/>

### **Roles and Purchasing Authority**

- **Department or School Leader.** Purchasing checklist, allowable spending, within budget limit, correct account coding
- **Director.** Vendor limit, appropriate approvals, compliant with purchasing policy and law (quotes obtained, solicitation etc.)

A summary of purchasing authority guidelines is in the following table. Any contract extending past 12 months must be signed by the Superintendent, Deputy Clerks, Facilities Director, or Financial Services Manager.

Required Authorization	Schools and Departments	Facilities, General Fund
Purchasing	all Personal Services agreements	
Department or school leader (or approved buyer)	Less than or equal to \$1,000	Less than or equal to \$5,000
Director	\$1,000–5,000	\$5,000–10,000
Financial Services (purchasing staff review), after director approval	\$5,000–150,000	\$10,000–150,000
Formal solicitation and Board approval, subject to Board Policy	Exceeds \$150,000	

Note that purchasing staff releases all PO's exceeding \$1,000 once authorization is documented (email or hard copy approval); this limit will increase to \$5,000 in FY16.

### **Cost Quotes and Request for Proposals**

Below are cost quote requirements for each spending limit range. **Dollar limits** below reflect District-wide spending for each fiscal year or for the life of the contract.

## Financial Procedures for Schools and Departments FY16

### Quote Requirements for Goods

Spending Total	Quote Requirement
Under \$5,000	Purchase from the best source; informal quotes (oral, written, noted attempt) are allowable
\$ 5,000 to \$74,999	Three quotes required
\$75,000 to \$149,999	Three <i>written</i> quotes required
\$150,000 or more	Written bid/proposal and Board approval required

### Quote Requirements for Personal Services (ICAs)

Spending Total	Quote Requirement
Up to \$25,000	Direct appointment
\$25,000 to \$99,999	Direct appointment upon a written finding by the District that states why it is in the District's best interest to do so
\$100,000 to \$149,999	Informal competitive process with three <i>written</i> quotes required
\$150,000 or more	Formal solicitation and Board approval required

### Selecting a Vendor and Sources of Supply

Before completing a purchase, check the Sources of Supply list for required and permitted vendors:

[http://www.4j.lane.edu/wp-content/uploads/2014/03/FSI\\_form\\_pu\\_src\\_of\\_supply.pdf](http://www.4j.lane.edu/wp-content/uploads/2014/03/FSI_form_pu_src_of_supply.pdf)

Staff are encouraged to communicate with the Purchasing staff regarding:

- Finding a suitable vendor
- Frequently purchased items for which the District has no contract
- Vendors that are not performing as agreed
- Difficult vendors
- *While you may meet with vendors, please keep in mind that you are under no obligation to do so.*

## Buying Equipment

### Purchase Order for Buying Equipment

For equipment purchases, Purchasing recommends using Regular Purchase Orders.

When Accounts Payable pays for an item on a PO line coded to accounts 460, 480, 541 or 542 the purchased item will automatically be transferred to the "Move to Inventory" screen in the Asset Inventory Management System. This occurs when the "receiver" is matched with the invoice by the Accounts Payable staff.

If a not-to-exceed PO is used to purchase equipment the item is *not* automatically recorded in the "Move to Inventory" screen in the Asset Inventory Management System. It will be necessary to tag the equipment and record it in the Asset Inventory Management System. *Benefit: In the case of theft,*

## Financial Procedures for Schools and Departments FY16

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*having complete records in the Asset Inventory Management System provides detailed information to Risk Management and the authorities.*

### **Fixed and Attractive Assets Definition/Inventory Requirements**

Fixed assets which must be recorded in the District's asset inventory management system are items that are movable or fixed units of furniture or furnishings, an instrument, a machine, vehicles, buildings, improvements, an apparatus, or a set of articles that meets **all** of the following conditions:

1. It has an anticipated useful life of more than one year.
2. It has a value of \$5,000 or more, measured as original cost or estimated market value (in the case of donated items).
3. It retains its original shape and appearance with use.
4. It is nonexpendable; that is, if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit.
5. It does not lose its identity through incorporation into a different or more complex unit or substance.

**Computers are required to be recorded in the District's asset inventory management system.** Computers should be purchased using a purchase order to ensure tracking for inventory and insurance purposes.

**Attractive assets** are items of equipment that do not meet the above definition, but are movable and valuable. Attractive assets include, but are not limited to, iPods, document cameras, clicker sets, and digital cameras. **A list of such equipment should be retained and tracked at the school, classroom, or department level.**

**Optional** – Schools and departments may record items in the asset inventory management system that are not required to be included if tracking is desirable.

**Note:** The preceding requirements of putting items into the Asset Inventory Management System are in addition to any inter-departmental tracking system that a school or department may use.

### **Assets Purchased with Federal Funds**

The Oregon Department of Education has created guidelines for entities receiving federal funding to purchase assets.

- Fixed assets should be recorded in the District's asset inventory management system. Include information to identify the funding used for the purchase.
- Equipment should be tracked at the classroom level and include the following information:
  - Purchase cost and date
  - Location/or employee it is assigned to
  - Record of receipt of purchase
  - Funding used for purchase
  - Disposition



## **Financial Procedures for Schools and Departments FY16**

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“Equipment” is defined as items with a useful life of more than one year and an acquisition cost of less than \$5,000. Equipment examples include, but are not limited to, iPods, printers, projectors, graphing calculators, and digital cameras. Schools and departments may use the asset inventory management system to record items for tracking purposes.

## Purchasing Requirements

Questions? Contact Purchasing at x 7620 or x7611 or by email at [accounting@4j.lane.edu](mailto:accounting@4j.lane.edu)

### IMPORTANT:

- Purchase orders provide the best method for controlling expenditures and ensuring vendors are appropriately contracted.
- All purchases must be pre-approved by the appropriate staff.

### Methods of Purchasing

The District provides three methods for completing purchases, including:

1. Purchase orders
2. Purchasing card (Visa, District credit card)
3. Reimbursement

**Note that the method used to complete a purchase does not change the requirements for approval, authority, or any other policy related to expenditures.**

### Purchase orders (POs)

Director approval is required for all purchases over \$1,000, *which includes multiple payments to one vendor that total more than \$1,000*. Please note that **splitting invoices is not allowed under state law (ORS279B.065(2))**. Lawson's PO module will automatically send notification when a PO exceeds spending limits for a buyer.

Additional guidelines for POs:

- Three types: regular, not-to-exceed, confirming
- Use regular or not-to-exceed POs whenever possible to make sure the vendor receives the terms and conditions of the purchase.
- Use confirming POs to pay for goods or services you have an invoice for and for goods that you already have in your possession or services that have already been rendered.
- **Make sure any POs less than \$1,000 are signed by your administrator and the terms and conditions are sent to the vendor.**

### District Purchasing Cards (Visa)

#### Overview

The Purchasing Card is a VISA card designed specifically for District use in purchasing low dollar materials and supplies, as well as for District-approved travel and training expenses. The Purchasing Card is a way to streamline processes and decrease costs by reducing the number of low dollar purchase orders. Each employee needing a Purchasing Card has his/her own individual card and account with pre-determined transaction limits and monthly spending limits established by the responsible administrator. Because Directors/Principals are responsible for the budgets that are used

## Financial Procedures for Schools and Departments FY16

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by credit card holders, they are to review the list of cardholders at their site annually and determine ongoing needs for card issuance.

Annually, all authorized cardholders will be asked to sign a memorandum of understanding that affirms they will be held responsible for maintaining sole possession and security of the card at all times and complies with district purchasing policies when using the credit card. The signed (MOU) should be returned to accounting by the first business day of October to retain credit card privileges. The MOU can be obtained from: <http://www.4j.lane.edu/finance/intranet/forms-documents/>, "Memorandum of Understanding for Card Holders".

### **Process for Requesting New Credit Card or Cancellation of Card**

A principal or director may request a credit card for staff as necessary for efficient purchasing of goods and services. *Limiting the number of cards is strongly advised* due to the time consuming nature of monitoring spending and reconciling statements. Email purchasing to cancel or make a change to an existing card or to setup a new card ([purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu)).

### **Cardholder Obligations**

- The Memorandum of Understanding outlines cardholder obligations.
- Obtain the statement, which is available online around the 6<sup>th</sup> of the month and received in hardcopy by the 10th
- Submit to Finance by the 20<sup>th</sup> of the statement month:
  - a reconciled, approved statement
  - all original, itemized receipts (not just the charge slip)
  - approval of spending with clear indication of district purpose for expenditure
- Obtain approval for statement. Cardholders do not approve their own statement. Principals and Directors may approve their reconciled statement subject to district central review; however, they are obligated to ensure compliance with District spending limits.
- Maintain physical custody of the credit card (each card holder); do not remove the card from a district facility except when necessary for the purchase of authorized items (e.g. do not store in purse or wallet).
- Report a lost or missing card immediately to US Bank (800-523-9078) and Purchasing.

### **Credit Card Limits**

- \$1,000 maximum for a single transaction; \$2,500 monthly spending limit.
- Limits cannot be changed as these align with the district spending limits.
- Purchases exceeding \$1,000 should be completed through use of the District Credit Card PO.

### **Access Online**

On line access to review card charges is available. Sign up is easy, improves efficiency and reduces paperwork. For instructions for registering at: <https://access.usbank.com> see Financial Services intranet Forms and Documents <http://www.4j.lane.edu/finance/intranet/forms-documents/> Staff who manage more than one card may request access for others cards (e.g. principal, custodian, other staff at your site) by asking the administrator to submit a request to Purchasing.

## Financial Procedures for Schools and Departments FY16

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### Allowed Credit Card Purchases

- Purchases of goods or services that support the educational purpose of the district and that are authorized by the District's adopted budget.
- Purchases of low dollar amounts as well as District approved travel and professional development expenses.
- Purchases within all other spending guidelines and with required documentation.

### Unallowed Credit Card Purchases

- Computers
- Items that do not comply with district policies and procedures:
  - Foods of minimal nutritional value that do not conform to the wellness policy e.g., pop, most candy, candy coated popcorn.
  - Any non-district purpose e.g., personal use, cash advances, alcoholic beverages, entertainment gift cards, gas or other expenses for personal car, fines or penalties.
  - Reimbursements over set limits.

### Vendors Excluded (MCC)

- The District has chosen to exclude some vendors based on their Merchant Category Code (MCC). These codes are those not generally related to District business. Certain merchant categories are blocked for all District Visa card purchases and include cash advances, wire transfers, pawn shops, fur shops, financial institutions, legal and accounting services as well as others.
- If you have a special need to purchase from a blocked MCC, have your administrator contact the Purchasing department at: [purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu).

### Required Receipts and Statement Documentation

- Obtain a **detailed receipt** for each purchase. Sign the receipt if you make the purchase in person.
- **Taxes:** For non-travel related tax fees (e.g. sales tax), request an exemption certificate from Purchasing and submit to vendor.
- Complete *Credit Card Payment Statement Form* at:  
<http://www.4j.lane.edu/finance/intranet/forms-documents/>.
  - **Attach original, itemized receipts, not just the charge slip summary.**
  - Use the missing receipt form to document purchases for which an itemized receipt is not available.
  - List and indicate account(s) to be charged and the amount to each account.
  - Do not deduct disputed amounts from your bill. Charge the amount and the corresponding credit when the dispute is resolved to the 31211 – Reimbursable Account.
  - Obtain administrator signature. Cardholders do not approve their own statement. Principals and Directors may approve their reconciled statement subject to district central review; however, they are obligated to ensure compliance with district spending limits.
  - Send to Purchasing by the 20<sup>th</sup> of the statement month.

### **Returns and credits**

- If a purchased item needs to be returned for any reason, make arrangements with the vendor to have the item shipped/delivered back to the vendor's place of business or warehouse.
- Keep a copy of any shipping documents used for returns and keep these records with your other documentation for future reference.
- The vendor should issue a credit for any item that has been agreed to for return. Review subsequent statements to assure that this credit has been processed and posted to your account.

### **Internet Purchase Guidelines**

When making district purchases through websites:

- Do not set up a district account.
- Do not select the option to “save credit card information.”
- Do ship directly to a district location. District purchases should never be received at home addresses. Such purchases are considered to be personal.

### **Fraud Prevention/Fraud Action**

- Contact US Bank immediately at 800-523-9078 if you feel your card has been compromised (e.g. lost, stolen or unauthorized charges on statement).
- Follow-up by contacting Purchasing at: [purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu).
- If contacted by US Bank, cardholder must provide verbal proof of identity (e.g., name, address, and phone number) and verbal verification of unauthorized transactions in order to lift the “fraud prevention hold” or to cancel card and reissue. US Bank will forward you the required paperwork.
- If charges are disputed, the cardholder must submit the required paperwork within thirty (30) days to US Bank, in order for the charges to be reversed.
- Cards that are lost/stolen/contain fraudulent activity will be canceled and a new account established. A new card will be issued and mailed to Purchasing in approximately one week. Purchasing will notify the cardholder that the new card is available to be picked up from Purchasing. If the old card is found, destroy it by cutting it in half and securely shredding it. Do not attempt to use the old card.

### **Revoking Credit Card Privilege**

- All District credit card use is subject to examination by the state auditor’s office.
- **The District shall have unlimited authority to revoke use of any purchasing card issued** and upon such revocation, the District shall not be liable for any cost subsequently charged to the card.
- The card may be revoked if charges occur that are personal, not authorized by a supervisor or other required authorizer, not allowed by federal, state or local laws and regulations or District policies and procedures, which lack proper detailed invoice support, or which lack timely receipt of documentation by accounting.
- Card holder may be required to pay unallowed charges and be disciplined up to and including termination from employment for violation of MOU agreement.

### Employee Reimbursements

Employees may be reimbursed for limited, small purchases as follows:

- Expenditure should be preapproved by authorized approver (e.g. principal or administrator). Consideration should be given for cost agreements for supplies, copying and printing, and other contracted services before approving reimbursement.
- Expenditure may not be for any personal services; employees providing services must be paid through payroll and contractors must be paid directly through district funds and under an ICA.
- Reimbursement is limited to \$250 per reimbursement, per month.
- Purchase must comply with district purchasing guidelines and documentation requirements.
- District staff should not benefit personally from purchases (e.g. cash-back for purchases on personal Costco card).
- Reimbursement should be submitted and paid through Financial Services within 60 days of when the expenditure was incurred.
- Personal cell phone expenses are generally not reimbursed except as provided under an employee stipend or monthly allowance.

### Inter-Governmental Agreements (IGA)

Pursuant to ORS 190.010, the District may contract with another government agency for performance of services. Please contact the Purchasing Department with questions regarding putting an IGA in place.

Only the Superintendent or a Deputy Clerk has the authority to sign an IGA (regardless of the amount)

### Independent Contractor Agreements (ICA)

Independent Contractor Agreements (ICAs) are for non-employee service agreements. The ICA must be completed and **signed by Financial Services two weeks in advance of the work being performed.**

***Even when a quote is not required, all*** service agreements require an ICA or other agreement. Contact purchasing to ensure that the service qualifies as a personal service.

**Remember:** Before services are rendered an ICA must be completed and sent to Purchasing for review and approval. A background check must be completed as part of the ICA. Either fingerprinting or a volunteer background check is allowed, depending on the circumstances. To document a volunteer background check is completed, provide to Purchasing a screen print of the name that is approved in the database. Contractors needing to be fingerprinted may pick up the fingerprint packet in Financial Services.

### ICA Process

- Clear scope of work and terms of payment must be indicated on the ICA (e.g. flat rate, fixed rate, reimbursement, etc.).
- Contracts that exceed \$1,000 require a completed purchase order for final review and approval by Financial Services.
- Contractor must be able to verify qualification as independent contractor, such as:

## Financial Procedures for Schools and Departments FY16

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- Maintenance of a business location separate from that of the client. May be a qualifying home office as defined by the IRS
- Bearing the risk of loss of the business (e.g. contracts based on lump sum payments and/or performance standards)
- Two or more separate clients in a 12 month period
- Significant investment in the business (i.e. tools, equipment, etc.)
- Authority to hire (and fire) other persons
- Schools/Departments select the ICA based on the total annual amount of business with the vendor:
  - Use the ICA noted “**Under \$600 Annually (District-wide)**” when a contractor payment is less than \$600 annually on a district-wide basis. This ICA allows a lower insurance requirement for the Contractor.
  - Use the ICA noted “**\$600 and Over Annually (District-wide)**” when a contractor payment exceeds \$600 annually on a district-wide basis. This ICA has higher insurance requirements for the Contractor.
  - The contractor is to provide an insurance certificate indicating adequate coverage. If an insurance certificate is not provided, an exception to the insurance requirement may be approved by Risk Management and documented in the form of an email.
  - Due to new IRS requirements, **payment may not be made without a completed ICA**. Any penalties for missing contracts will be paid by the department or school.

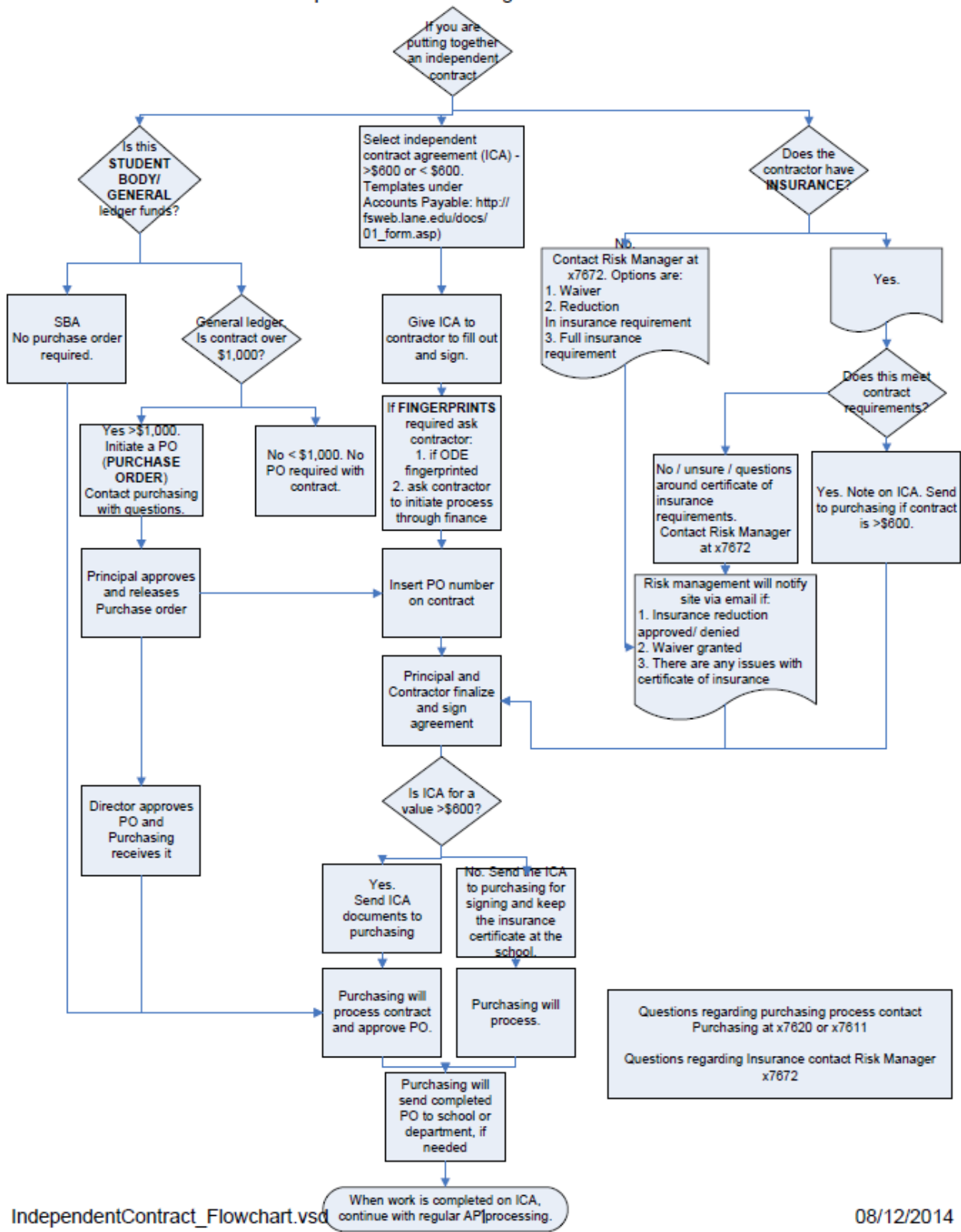
### **Paying the Contractor**

1. Contractor must submit an invoice that clearly documents services completed and billing amount
2. Advanced payment, or payment before services have been completed, are NOT ALLOWED
3. School or Department verifies services as listed on invoice are completed as agreed and at the agreed rate.
4. Confirming or not to exceed PO is submitted for ICA's less than \$1,000 (PO should already be released for \$1,000 or greater).
5. Invoice is submitted to AP for payment; the ICA is not an invoice and does not generate payment.

**A flowchart is provided to outline the considerations and documentation requirements when developing an ICA.**

# Financial Procedures for Schools and Departments FY16

## Independent Contractor Agreement - Flowchart



IndependentContract\_Flowchart.vsd

08/12/2014



## **GUIDELINES FOR COMMONLY USED ACCOUNTS**

Questions? Contact Accounting at x 7614 or x7621 or by email at [accounting@4j.lane.edu](mailto:accounting@4j.lane.edu)

*This section provides guidance for specific accounts commonly used by schools and departments. The Chart of Accounts has a detailed description for each component of the accounting system, including all Funds, Cost Centers, Functions, Areas, Accounts, and Sub-accounts. See <http://www.4j.lane.edu/finance/intranet/forms-documents/>.*

### **Petty Cash**

#### **Petty Cash**

*For Schools:* See the student body manual for detailed procedures. The maximum General Fund Petty cash on hand allowable is \$100 for an elementary school; \$150 for middle school; and \$300 for a high school or program.

*For Programs:* Petty cash funds may only be replenished based on receipts. Include with each Petty Cash PO all receipts collected from petty cash expenditures. The monthly reconciliation with beginning balance, expenditures, and ending balance should accompany PO requests for petty cash, with signature of administrator to confirm balances.

### **Professional Development Costs**

#### **Professional Development Plans**

Plans should be submitted to the appropriate administrator in advance explaining how the training will contribute to the achievement of Board, Superintendent, and instructional goals and the funding source for the training.

#### **Professional Development Allowable Use**

Professional Development (PD) funds are intended to be an individually driven benefit for administrators (account 241) and the purpose of the fund is flexibly defined. Therefore, an individual's allotment of PD funds may be used for accommodation expenses for a retreat, allowable as per the MAPS/District agreement. Spending must follow district guidelines as it is use of District Funds.

#### **Recording Use of PD**

When PD funds are budgeted through account 241, related expenditures should also be recorded to that account. PD expenditure beyond employee-contracted benefit costs should be expended to the applicable account (e.g. out of district expense). When necessary, budget authority should be transferred to the appropriate professional development accounts prior to use of Funds.

### **Meetings, Travel, and Meals**

#### **Non-Travel Food Purchases**

Occasionally it is in the best interest of students and the District for staff to meet with community members, students, or other stakeholders over a meal period. In such instances, it is appropriate for

## Financial Procedures for Schools and Departments FY16

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the district to pay for that meal; however, meals must be reasonable in the eyes of the public. To determine if food or meals may be provided for District meetings, including professional development and trainings, please review the timeframes below.

<b>Breakfast</b>	Meeting/Training commences prior to 7:00 a.m.
<b>Lunch</b>	Meeting/Training runs continuously from 11:00 a.m. to 1:00 p.m.
<b>Dinner</b>	Meeting/Training extends past 7:00 p.m.
<b>Refreshments</b>	More than 10 participants and exceeds one hour

- Meetings should be scheduled over meal periods **only when it is the most efficient and effective option** for conducting district business and must be reasonable under public scrutiny.
- Use of 4J Catering through Nutrition Services is encouraged.
- Food must meet district nutrition standards (see Wellness Policy).
- Receipts must be itemized, list attendees, and describe district business/educational purpose.
- Alcohol costs are non-reimbursable.
- Snacks and beverages are not reimbursable in-district, unless as part of a training exercise for more than 10 people and meeting is longer than 1 hour. If provided for a training exercise, documentation must be provided as described in this section and meets district nutrition standards.
- Costs exceeding maximum spending limit are not reimbursable, and any over-expended District Funds will be paid with personal funds.
- Exceptions to the above require preapproval by the Chief of Staff or Superintendent.
- See OAM 10.40.10.PO for additional guidelines.

### **Spending Limit for Meal Purchases**

Non-travel expenditures for meals or refreshments should be reasonable in cost and generally not exceed the related GSA rate for Eugene (<http://www.gsa.gov/portal/content/104877>). Through September 2015, the rate is set at \$51.00 per person. The following guidelines provide the per meal allowance:

Meal(s)	Spending Limit with Gratuity	Per Person Limit
Breakfast only	25% of per diem limit	\$12.75
Lunch only	25% of per diem limit	\$12.75
Dinner only	50% of per diem limit	\$25.50
Refreshments only		\$5.00

**All above limits INCLUDE gratuity.**

### **In-District Travel**

- Employees attending functions within driving distance should commute together if schedules permit.
- Direct costs for personal cars such as a tank of gas, repairs, washing, and maintenance are not reimbursable. **Only a mileage allowance may be claimed.**

## Financial Procedures for Schools and Departments FY16

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- Use of an employee's personal vehicle for District business will be reimbursed at the IRS mileage rate. The actual expense for tolls and parking will be reimbursable and documented with receipts.
- Commuting mileage is not reimbursable as it is a personal expense and defined as the distance from the employee's residence to primary workstation.

### Out of District and Out of State Travel

#### Overview of Travel Expenditures

- When costs exceed the criteria described below, the excess cost will be paid with personal funds.
- Non-employee travel, meal and other expenses, such as costs for an accompanying spouse, are not reimbursable.
- Submit approved "Out of State Travel Approval Request", "In State Overnight Travel Approval Request", or "Professional Development Plan" when submitting invoices. These forms are located at: <http://www.4j.lane.edu/finance/forms/>.
- Reimbursement of personal expenses shall not be authorized for payment at any time. For example, employees will not be reimbursed for parking tickets, lodging safe fees, or commuting mileage. Commuting mileage is defined as the distance from the employee's residence to primary workstation.
- Exceptions require preapproval by the Chief of Staff or Superintendent.

#### Approval for Out of District and Out of State Travel

- All out of district travel **must be preapproved by a Director** for each employee.
  - Use the in state overnight travel approval request form.
  - Overnight trips should exceed 75 miles one-way.
  - Overnight travel within the state should be for events that span at least two days.
- All out of state travel **must be preapproved by a Director and the Superintendent** for each employee traveling out state.
- Out of district retreats may be scheduled with prior approval of the Chief of Staff or Superintendent.

#### Transportation Costs

- District employees are expected to use the least cost carrier and class available and to car pool, where possible. Business and first class are not reimbursable.
- If an employee chooses to use his/ her personal vehicle in lieu of air travel, the employee will be reimbursed on the basis of airfare or mileage rate, **whichever is lower**.
- The District will reimburse employees for reasonable taxi, bus, shuttle, subway or rental car expenses, based on receipts and with a tip of up to 15%.
- Airfare may be purchased through the Azumano Travel Agency (see *Corporate Travel Agency (Azumano Travel)*)

#### Lodging Costs

- Itemized hotel receipts are required. Room charges must be at GSA single occupancy rate (<http://www.gsa.gov/portal/category/100120>) or the standard conference hotel rate (with a copy of the conference application and conditions) unless staff shares a room on a trip. For

## Financial Procedures for Schools and Departments FY16

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example, the maximum reimbursable room rate in Eugene is \$99.00 per day through September 2015. Any difference must be approved in advance by the Superintendent or Chief of Staff.

- Staff should request the government rate, or lowest rate available when reserving lodging.
- Charges for business related faxes, internet service, photocopying, parking and business related local or long-distance calls will be reimbursed when free services are not available and must be detailed on the hotel receipt. Document on the receipt the business purpose.
- Charges for staying with friends or relatives are not reimbursable.
- In-room movies are not reimbursable.

### **Corporate Travel Agency (Azumano Travel)**

The District has contracted with Azumano Travel to assist with travel reservations. Using the travel agency will help with Visa limits as the billing is programmed to charge to the District Visa. The service also helps by coordinating group purchase of tickets and can help with other travel details and travel emergencies. Each school and department may setup a Travel Coordinator, who will have the ability to use the travel website to book travel for staff.

#### **Using Azumano**

- Request to be trained and setup as a travel coordinator (contact purchasing)
- Create profiles for travelers if possible as it will expedite purchasing tickets for staff.
- Do not change the password on any file. We cannot access forgotten passwords for you.
- No personal membership numbers can be added to the file for travel paid by the District.
- A District Out-of-State travel form needs to be approved for each employee, prior to the ticket being booked.
- A VISA PO needs to be processed for the air travel totaling over \$1,000 prior to booking any tickets.
- Have all traveler information necessary to reserve tickets available at the time you add the ticket to your cart.
- Verify the current mobile number for each traveler to ensure that they can be contacted with any travel emergencies by the airline, etc.
- The billing is programed into the system and will be billed to the District Financial Services card.
- State contract information is located at DAS- State Procurement Office link on Azumano Travel homepage.

### **Staff Celebrations and Flowers**

#### **Staff Celebrations**

Costs related to staff celebrations must be paid with non-district or personal funds. Please see OAM 10.40.109 for clarification.

#### **Flowers**

Flowers are not allowable expenditures except for graduation decorations, within a reasonable cost.

### Gifts and Gift Cards

Gifts are not allowable uses of general funds. Below are specific procedures related for different gift purposes.

#### **Volunteers**

Gifts may be given to volunteers to show appreciation, if the amount is of a nominal value, (e.g. not exceeding \$25) and not in the form of cash or a gift card. Gifts should be from student body funds raised for this purpose.

#### **Staff**

District employees may not receive gifts as described in the *Ethics Guidelines* section.

#### **Students**

Generally, gifts are not allowed for students. An allowed student exception is when a gift is necessary to support temporary need as part of specific superintendent-authorized programs, such as the homeless program run by the Instruction Department (from the General Fund), or if specifically allowed under the terms of a grant (Grant Fund), or if using student body funds that were collected with this stated purpose (Student Body Funds).

- a) *General Funds*. Allowed student exceptions are extremely limited. One example is the Positive Behavior Interventions and Supports (PBIS) program. **PBIS** is a program designed to encourage positive student behavior and an allowance is provided to each school to provide resources for this program. Intervention programs might comprise specific activities or rewards and awards for students. Because public funds support purchase of incentives it is important to ensure purchase of an identifiable educational good or service with the funds and that the incentive is received by the intended student. The cost of these items should be nominal and in any event no greater than \$15. Examples of incentives are a hat, t-shirt, backpack, or water bottle.

With prior approval through the PBIS office and submitted to finance, schools may purchase gift certificates or stored value (gift) cards that are linked to a specific good or service. An example of such a card would be a stored value card for the cost of a movie ticket. Other examples should align with the District's wellness policy.

If the school purchases gift certificates or stored value cards, please follow these additional procedures to verify that the purchase reaches the intended recipient:

1. Keep a description of the purchase of the incentive and criteria for getting one
  2. Keep the cards in a locked cabinet or drawer until distributed
  3. Keep a list of who received cards, the list should be signed by students as the cards are distributed to them
  4. Once the cards are all given out, ensure that the list contains the same number of recipients as the number of cards that were distributed.
- b) *Grant Funds*. Allowed student exceptions must align with the specific terms of the grant. The grant must state that gifts or gift cards are allowed. For example, Title funds may not be used for the purchase of gifts. Limited exceptions for students are made when the item is:

## Financial Procedures for Schools and Departments FY16

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- a. non-cash or cash-like (no gift card or retail vouchers) items without a restriction over purchase (some tickets for admittance might be allowable),
- b. of an amount that is of minimal value (with a transaction value of less than \$25), and/or,
- c. a token (hat, t-shirt, pen, baseball cap, backpack, water bottle).

Moreover, the gift must satisfy the following conditions:

- Be approved by the Grantor– or clearly be within the spirit of the grant (grant manager will be required to justify),
- Meet the district’s goals,
- Be in response to an activity – not a giveaway – specified in the reimbursement request, and
- A list of recipients, signed by recipients, should be provided to accounting with the request for reimbursement.

c) *Student Body Funds*. See the Student Body Manual for additional information (<http://www.4j.lane.edu/finance/intranet/forms-documents/>).

## **Payroll**

### **Submission Dates**

#### **Payroll Forms: Timesheets**

Staff paid through timesheets record time over the period from the 16<sup>th</sup> of the previous month to the 15<sup>th</sup> of the current month. Please submit appropriately signed timesheets as soon after the 15<sup>th</sup> as possible.

#### **Payroll Forms: Direct Deposit Request**

Direct deposit forms received after the 15<sup>th</sup> will be entered if at all possible. Remember that a paper check will be printed the first payday after a direct deposit account is established or changed. This allows the bank to verify the deposit information.

#### **Other Payroll Forms**

Forms received by the 15<sup>th</sup> of the month will be processed in the current month. Forms received after the 15<sup>th</sup> will be processed the following month. Other payroll forms include:

- Extended Contract Form
- W4 Federal Tax Withholding Form
- Request for Removal from Payroll Deduction
- Tax Sheltered Annuity (TSA, 403b) Enrollment Form
- Mileage Reimbursement Form
- Travel Reimbursement Form
- Employee Reimbursement Form

### **Payroll Forms and Information**

#### **Payroll Forms Online**

Many payroll forms are available online at <http://www.4j.lane.edu/staff/forms> and <http://www.4j.lane.edu/finance/forms/>.

The web page forms:

- Are the current official version
- May be completed directly on-line
- May still be printed and completed manually
- Most completed HR forms can be e-mailed to HR
- Forms that have an asterisk require a signature (print the completed form, obtain the required signature, and send to appropriate department)

#### **Monthly Wage Statements (My Pay Stub)**

Direct deposit wage statements are available online and directions are provided at <http://www.4j.lane.edu/staff/paystub/>. Access requires six digit employee number. Note that wage statements are password protected by the last four digits of the social security number.

## Financial Procedures for Schools and Departments FY16

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### W-2s

W-2's are not available online. To receive a copy of a W2, contact the Payroll Department.

Janette Eichler:	A-L	790-7613
Carol Alferes:	M-Z	790-7612

### **Employee Self Service**

Lawson Employee Self-Service is a collection of web forms from which you can view and change some of your Human Resources and Payroll information. To access any of the information listed below, go to <http://www.4j.lane.edu/finance/intranet/lawson-employee-self-service/>

*Note: To access the ESS site, User must be connected to the 4J network, either from within a District building, or via VPN.*

### **Time and Absence Reporting**

Enter absence hours for vacation, sick leave, or other types available to staff for paid and unpaid leave.

### **Personal Profile**

Displays basic personnel information: employee name, preferred name, social security number (last four digits), birth date, gender, race, and ethnicity.

### **Leave Balances**

Displays balances for sick leave, vacation, and other leave types.

### **Pay Checks**

Displays paycheck information for the last 12 months. This is the same information as on your direct deposit notice, but presented in a tabular format. Visit the My Pay Stub web site to view or print a formatted copy (see *Monthly Wage Statements (My Pay Stub)*)

### **Additional Compensation**

#### **Classified Overtime/Additional Hours**

- Overtime and Compensatory Time must have **prior approval from a supervisor**
- Additional hours (straight time) for time worked up to 8 hours per day or 40 hours per week
- Overtime or Compensatory (comp) time (time and a half) for any time worked in excess of 8 hours per day or 40 hours per week. (Temporary employees' and walk-on coaches' overtime is paid for hours in excess of 40 per week.)
- Overtime should be submitted on an employee timesheet
- Comp time must be tracked at the building level
  - Only for occasional and irregular overtime work
  - Maximum of 240 hours may be accumulated
  - Must be used or paid within 26 months of earning
  - If employee changes buildings, send comp time records to secretary/principal at the new building



## Financial Procedures for Schools and Departments FY16

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- Comp time balances must be paid when an employee discontinues working for the district
- Notify principal, human resources and payroll
- Send comp time records to payroll

### **Licensed/Administrator/Professional Extended Contracts**

- Payment for special or one-time projects over and above the employee's assigned work (**not eligible for overtime or compensatory time**)
- May pay flat fee (licensed per diem daily rate for district sponsored trainings) or base on hourly wage
- Submit on Extended Contract form ( <http://www.4j.lane.edu/finance/forms/>)

### **Purchasing Additional Staffing**

#### **Non-grant fund (not fund 260) purchases**

Use the table titled *2015–16 Staff Conversion and Costing Table (July 1, 2015)* in this handbook. This information is also on the Payroll information page of the Financial Services intranet site. If you need further assistance, please contact [budget@4j.lane.edu](mailto:budget@4j.lane.edu).

#### **Grant Fund (260) purchases**

The staff conversion and costing table (see *2015–16 Staff Conversion and Costing Table for Payroll and Employee Benefits*) may be used to estimate staff costs. Contact the Grants Accountant ([grants@4j.lane.edu](mailto:grants@4j.lane.edu)), ext. 7618 for help with estimates or to get actual costs.

### **Labor Laws and Exempt Status**

#### **Fair Labor Standards Act (FLSA)**

The FLSA establishes minimum wage, overtime pay, recordkeeping, and youth employment standards affecting employees in the private sector and in Federal, State, and local governments. Following are examples of exemptions which are illustrative, but not all-inclusive. These examples do not define the conditions for each exemption.

Exemptions include:

1. executive, administrative, and professional employees (including teachers and academic administrative personnel in elementary and secondary schools)
2. outside sales employees
3. employees in certain computer-related occupations (as defined in Department of Labor regulations)

## **Nutrition Services**

### **Important Phone Numbers:**

**Main Line 541-790-7656**

**Fax 541-790-7650**

<b>Responsibility Area</b>	<b>Contact</b>
Employee questions, budget, menus, local foods, parent concerns	<b>Kaylynn Olney</b> , Director x7658 <i>kolney@4j.lane.edu</i>
Secondary supervision – including menus, allergies, safety and training	<b>Julie Whittlesey</b> , Assistant Director x7655 <i>whittlesey_j@4j.lane.edu</i>
Elementary supervision – including menus, allergies, safety, training, mealtime and pay-online questions	<b>Steve Cooper</b> , Manager x7657 <i>cooper_s@4j.lane.edu</i>
Free & Reduced information, G/L questions, billing, mealtime and pay-online questions	<b>Karla Bengtson</b> , Accounting Clerk x7659 <i>bengtson_k@4j.lane.edu</i>
General food service questions, Free and Reduced information	<b>Terry Hafdahl</b> , Program Assistant x7656 <i>hafdahl@4j.lane.edu</i>
F&R Benefits Information, Meal Benefit Applications, Direct Certification, Meal Account Balances	<b>Diann Rosenberg</b> , NS Clerk x7653 <i>rosenberg_d@4j.lane.edu</i>
Catering orders	<b>Patty Rigsby</b> , Production & Catering Services x7654 <i>rigsby@4j.lane.edu, catering@4j.lane.edu</i>

### **Catering**

Please refer to the 4J catering event order guide when placing an order (see <http://www.4j.lane.edu/nutrition/catering/>). For questions or to place an order, call x7654 or email [catering@4j.lane.edu](mailto:catering@4j.lane.edu).

### **Free and Reduced Applications**

Nutrition Services has Free and Reduced Applications (Spanish and English) year-round. Please call if you need additional copies. **Free and Reduced Applications are also available from the 4J web site:** <http://www.4j.lane.edu/nutrition/freelunch>. Please send all applications to Nutrition Services, and due to high volume please do not fax applications. Place an “N” in the top left hand corner of the application if the student is new. Our office will give these applications priority.

**The drop date for families that do not turn in new applications is October 16, 2015.**

## Warehouse

If you have questions, please contact Ron Bell at x 7646 or by email at [warehouse@4j.lane.edu](mailto:warehouse@4j.lane.edu)

### **Confidential Shred**

Confidential Materials to be discarded should be sealed and labeled as “Confidential Shred” and returned to the warehouse. **Please remove documents from any folders or binders prior to boxing the documents.** The warehouse will coordinate with our confidential recycling company to ensure appropriate distribution.

### **In-District Mail**

The warehouse also handles in-district mail distribution. To ensure expeditious delivery, in-district mail should be labeled as follows:

<b>From:</b> Name and school/department	<b>To:</b> Name and school/department
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### **Surplus Property/Loaner Equipment**

Warehouse staff manages surplus furniture and equipment. If you are interested in an item, please enter a work order, and warehouse staff will notify you of item availability. The warehouse also has a few items that are available for loan to schools. **Loaner equipment is available for school district functions only on a first come, first served basis.** No personal use is allowed. Requests for surplus property and loaner equipment should be made on the work order system. Access to the system can be obtained by contacting Theresa Shelby in Facilities at extension 7400.

#### **Items available for loan:**

1. Tables – 8 foot rectangle folding, available in groups of 10
2. Chairs – Metal folding, available in groups of 30
3. Scaffolding – aluminum, available on rolling cart (needs to be assembled)
4. Delivery truck – certain restrictions apply

**Please place requests as early as possible to ensure availability and allow warehouse staff time to schedule delivery**

## Financial Procedures for Schools and Departments FY16

### Warehouse Catalog for Schools and Departments

*\*Prices are subject to change*

<u>Item No.</u>	<u>Item Description</u>	<u>U/M</u>	<u>Price</u>
21741	4J CERTIFIED REQUEST FOR LEAVE 50/PKG	PK	3.62
14005	BACK TO SCHOOL ENVELOPES 100/PKG	PK	6.70
05062	BAG PAPER #02 4" X 2 X 8" 100/PKG 1000/BALE 07139	PK	4.07
05066	BAG PAPER #06 6" X 3 3/4" X 11" 100/PKG 500/BALE UG 30923	PK	2.83
05064	BAG PAPER 8 1/2" X 6" X 14" 500/BNDL/420S UG # 30923	PK	8.26
05340	BOOK LESSON PLAN 6-SUBJECT 40 WEEKS HAMM & STEPHNS 456-6	EA	2.47
13004	BOX CARDBOARD 15"X12"X10" R278 25/BNDL 700/PALLET	EA	1.05
13001	BOX CARDBOARD 20" X 14" X 14 R561 20/BNDL 240/PALLET	EA	2.00
06981	CUP COLD 3 OZ 100/PKG 12200 3 OZ REFILL 50/CA SWHRT	PK	4.30
22641	DIRECTED PENMANSHIP I	EA	1.32
22642	DIRECTED PENMANSHIP II	EA	1.60
22643	DIRECTED PENMANSHIP III	EA	1.32
22644	DIRECTED PENMANSHIP IV	EA	1.54
22645	DIRECTED PENMANSHIP V	EA	1.95
14004	ENVELOPE #10 PRINTED 4J RETURN ADDRESS 500/BX	BX	18.23
14000	ENVELOPE HOMEWORK 10 X 13 STDNT NAME PARENT SIG. 100/PK	PK	17.35
21813	FORM POSTAGE METER CHARGE SLIPS 100 PER PKG.	PK	0.00
21023	FORM PRINTING WORK ORDER (SOLD IN PKG OF 100)	PK	10.36
19568	GLOVES NURSES MED. LG 100/BX LATEX PWDRED UG58494	BX	5.26
19569	GLOVES NURSES MED. MED. 100/BX LATEX PWDRED 58492	BX	6.34
59652	HAND SANITIZER 8 OZ PUMP PURELL	EA	3.66
16136	HAND SANITIZING WIPES 135/TUB	EA	9.80
07755	LABELS POSTAL SCHOOL DIST. 4J PRINTED RETRN ADDRESS 50/PK	PK	1.58
07820	LAMINATING FILM 25" X 500' GLOSS GBC# 3000004 2 ROLLS/BX	BX	44.49
59662	MASK FACE SURGICAL 50/bx	BX	5.00
12055	PAPER BOND 11 X 17 WHITE 5/case 20#	RM	5.28
12005	PAPER BOND 3 HOLE WHITE 8 1/2X11 10/case 20#	RM	2.73
12385	PAPER BOND 3-HOLE PINK 8 1/2 x 11 10/case 20#	RM	3.49
12383	PAPER BOND 3-HOLE CANARY 8 1/2x11 10/case 20#	RM	3.48
12380	PAPER BOND 3-HOLE STARLITBLUE 8 1/2 X 11 10/case 20#	RM	3.56
12300	PAPER BOND 8 1/2 X 11 BLUE 10/case 20#	RM	3.26
12303	PAPER BOND 8 1/2 X 11 BUFF 10/case 20#	RM	3.28
12306	PAPER BOND 8 1/2 X 11 CANARY 10/case 20#	RM	3.27
12309	PAPER BOND 8 1/2 X 11 CHERRY 10/case 20#	RM	3.28
12331	PAPER BOND 8 1/2 X 11 GRAY 10/case 20#	RM	3.06
12312	PAPER BOND 8 1/2 X 11 GREEN 10/case 20#	RM	3.33
12318	PAPER BOND 8 1/2 X 11 IVORY 10/case 20#	RM	3.26
12321	PAPER BOND 8 1/2 X 11 ORCHID 10/case 20#	RM	3.25
12324	PAPER BOND 8 1/2 X 11 PINK 10/case 20#	RM	3.26
12327	PAPER BOND 8 1/2 X 11 SALMON 10/case 20#	RM	3.26
12334	PAPER BOND 8 1/2 X 11 TAN 10/case 20#	RM	3.27
12000	PAPER BOND 8 1/2 X 11 WHITE 10/case 20#	RM	2.35
12043	PAPER BOND 8 1/2 X 14 WHITE 10/case 20#	RM	3.57
12009	PAPER BOND PRINTED DIST 4J LETTERHEAD 8 1/2 X 11 25% RAG	RM	15.96
12117	PAPER BROCHURE TAN 8.5 X 11 10/case 60#	RM	1.80
12120	PAPER BROCHURE WHITE 8.5 X 11 10/case 60#	RM	2.34
13012	PAPER CARDBOARD 36" X 72" 32ECT CORRUGATED PAD 270/PLT	SH	2.28

## Financial Procedures for Schools and Departments FY16

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<u>Item No.</u>	<u>Item Description</u>	<u>U/M</u>	<u>Price</u>
14066	PAPER COMPUTER PRINTER 9-1/2" X 11" CLEAN EDGE LASER	CA	17.05
14064	PAPER COMPUTER PRINTER 11" X 14 7/8 1 PLY IBM S-20	CA	37.80
13090	PAPER INDEX 8 1/2 X 11 BLUE 8 pkg/case 90#	PK	4.37
13092	PAPER INDEX 8 1/2 X 11 CANARY 10 pkg/case 90#	PK	4.36
13094	PAPER INDEX 8 1/2 X 11 CHERRY 8 pkg/case 90#	PK	4.41
13096	PAPER INDEX 8 1/2 X 11 GREEN 8 pkg/case 90#	PK	4.25
13098	PAPER INDEX 8 1/2 X 11 WHITE 8 pkg/case 90#	PK	4.15
13050	PAPER RAILROAD BLACK 25/PKG 6 PLY 22 X 28	SH	0.30
13052	PAPER RAILROAD BLUE AZURE (LIGHT) 25/PKG	SH	0.30
13064	PAPER RAILROAD BOARD BROWN 25/pkg 6ply 22 x 28	SH	0.38
13058	PAPER RAILROAD CORAL PINK 25/PKG 6 PLY 22 X 28	SH	0.30
13054	PAPER RAILROAD DARK BLUE 25/PKG 6 PLY 22 X 28	SH	0.30
13062	PAPER RAILROAD GREEN EMERALD 25/PKG 4 PLY 22 X 28	SH	0.30
13056	PAPER RAILROAD LIGHT BLUE 25/PKG 6 PLY 22 X 28	SH	0.30
13068	PAPER RAILROAD MAGENTA 25/PKG 6 PLY 22 X 28	SH	0.30
13070	PAPER RAILROAD ORANGE 25/PKG 6 PLY 22 X 28	SH	0.30
13074	PAPER RAILROAD RED 25/PKG 6 PLY 22 X 28	SH	0.30
13076	PAPER RAILROAD WHITE 25 SHTS PER PKG 6 PLY 22 X 28	SH	0.26
13080	PAPER RAILROAD YELLOW CANARY 25/PKG 6 PLY 22 X 28	SH	0.30
13082	PAPER RAILROAD YELLOW LEMON 25/PKG 6 PLY 22 X 28	SH	0.30
13100	PAPER TAG 12" X 18" MANILA S-150 EVERETT 47-710	SH	0.01
13104	PAPER TAG 24" X 36" MANILA TORCHGLOW 150 LB 500/CTN	SH	0.26
22735	PUB.LANG.ARTS MY WORD BOOK-WITH WORDS.	EA	0.23
22739	PUB.LANG.ARTS MY WORD BOOK-WITHOUT WORDS.	EA	0.23
09115	SHARPENER PENCIL CHICAGO BEROL M3-51130 12/CA	EA	8.14
07000	SHARPENER PENCIL CUTTER HEAD CHICAGO 2-A M3-51150 12/CA	EA	8.91
07005	SHARPENER PENCIL CUTTER HEAD GIANT 3-1 BEROL M3-3222 12/CA	EA	5.82
09120	SHARPENER PENCIL GIANT SANFOR M3-51131	EA	5.25
21491	STUDENT ACCIDENT REPORT GSP-70 (1PKG=100)	PK	18.73
13002	TAPE BOX SEALING 2"X 54 YDS. ITEM # A83750-2-CR	RL	3.50
19620	TOOTHBRUSHES (NURSE SUPPLY)	EA	0.00
14131	WRITING TABLET (LANDSCAPE) #SS15 ORDER FROM INSTA PRINT	EA	1.23

## Financial Procedures for Schools and Departments FY16

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### Warehouse Delivery Schedule

The 2015–16 warehouse delivery schedules provide estimated times only. We appreciate your patience if due to heavy loads and/or traffic, drivers are later than the estimated time.

**\*No district mail delivery or pickup on Fridays**

#### North Route

Monday/Wednesday Office Deliveries  
Driver: Cal Pearman

School or Building	Approximate Arrival Time
River Road	10:00
Kelly	10:30
Howard	10:45
Yujin Gakuen	11:00
Corridor	11:05
North Eugene	11:20
Madison	11:40
Awbrey Park	12:00
Spring Creek	12:20
Trans/Grounds	12:45

#### North/Sheldon Route

Tuesday/Thursday Mail Deliveries  
Driver: Patrick Rigel

School	Approximate Arrival Time
River Road	9:30 AM
Kelly	9:55 AM
Howard	10:15 AM
YG	10:25 AM
Corridor	10:30 AM
North Eugene	10:40 AM
Madison	11:05 AM
Awbrey Park	11:30 AM
Spring Creek	11:40 AM
Willagillespie	12:05 PM
Buena Vista	12:15 PM
Cal Young	12:25 PM
Gilham	12:50 PM
EEA	1:10 PM
Sheldon	1:30 PM
Monroe	1:45 PM
Holt	2:15 PM

#### Sheldon Route

Monday/Wednesday Office Deliveries  
Driver: Andrew Fischer

School	Approximate Arrival Time
Facilities	10:00
OSEA	10:15 as needed
Holt	10:30
Monroe	10:45
Buena Vista	11:00
Cal Young	11:15
Gilham	11:30
EEA	11:50
Sheldon/KRVM	12:10
Monroe	12:25
Holt	12:45

## Financial Procedures for Schools and Departments FY16

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### South Route

Tuesday/Thursday Office Deliveries

Driver: Andrew Fischer

School	Approximate Arrival Time
Facilities	9:45
OSEA	10:00 as needed
Spencer Butte	10:15
Edgewood	10:30
Fox Hollow	10:40
Camas Ridge	11:00
LCC	11:30
Edison	11:40
Roosevelt	12:00
South	12:20

### Churchill/South Route

Monday/Wednesday Mail Deliveries

Driver: Patrick Rigel

School	Approximate Arrival Time
Chavez	9:45 AM
ATA	10:05 AM
Adams	10:20 AM
South	10:35 AM
Roosevelt	10:55 AM
Edison	11:20 AM
LCC	11:35 AM
Camas Ridge	11:50 AM
Fox Hollow	12:10 PM
Edgewood	12:35 PM
Spencer Butte	12:50 PM
Family @ Crest Drive	1:00 PM
Twin Oaks	1:20 PM
Natives/Baily Hill Instructional Center	1:35 PM
Kennedy	1:50 PM
Churchill	2:05 PM
McCornack	2:15 PM

### Churchill Route

Tuesday/Thursday Mail Deliveries

Driver: Cal Pearman

School	Approximate Arrival Time
Family @ Crest Drive	9:45
Twin Oaks	10:00
Natives	10:10
Kennedy	10:20
Churchill	10:45
McCornack	11:05
ATA	11:20
Adams	11:40
Chavez	12:05
Grounds	12:25
Twin Oaks	12:45

Transportation 1:00

## **Wellness Policy**

### **Healthy Snacks Guidelines**

These healthy snack guidelines apply to items sold in a school at all times during the regular or extended school day, except for events at which adults are a significant part of the audience such as athletic events, carnivals or performances.

#### **Snack Foods**

Each individual food item may not contain any trans fat and will have no more than:

- 35% of its calories from fat (excluding legumes, nuts, seeds, nonfried vegetables, cheese, eggs, and other nut butters) and 10% of its calories from saturated (excluding nuts, eggs, and cheese)
- 35% of its weight from added sugars (does not apply to fruit and vegetables)
- 350 mg of sodium per serving for bread, sweets and salty snacks; 480 mg for nutrient-dense snacks, such as nuts, seeds, fruits, vegetables, dairy; 530 mg for pre-packaged entrees, such as “hot pockets,” soups, burritos; 600 mg for freshly made daily entrees.
- Elementary school (K–5) items may not contain more than 150 total calories.
- Middle school (6–8) items may not contain more than 180 total calories.
- High school (9–12) items may not contain more than 200 total calories.

#### **Beverages**

Kindergarten-5<sup>th</sup> Grade: Beverages will be limited to water and the following:

- Fruit or vegetable juice, provided the beverage item is not more than 8 ounces, is 100% juice with no added sweeteners and contains no more than 120 calories per 8 ounces.
- Milk or a nutritionally equivalent milk alternative, provided the beverage item is not more than 8 ounces, is fat-free or low-fat and, if flavored, contains no more than 150 calories per 8 ounces.

6<sup>th</sup>-8<sup>th</sup> Grade: Beverages will be limited to water and the following:

- Fruit or vegetable juice, provided the beverage item is not more than 10 ounces, is 100% juice with no added sweeteners and contains no more than 150 calories.
- Milk or a nutritionally equivalent milk alternative, provided the beverage item is not more than 10 ounces, is fat-free or low-fat and, if flavored, contains no more than 190 calories.

9<sup>th</sup>-12<sup>th</sup> Grade: Beverages will be limited to water and the following:



## Financial Procedures for Schools and Departments FY16

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- Fruit or vegetable juice, provided the beverage item is not more than 12 ounces, is 100% juice with no added sweeteners and contains no more than 180 calories.
- Milk or a nutritionally equivalent milk alternative, provided the beverage item is not more than 12 ounces, is fat-free or low-fat and, if flavored, contains no more than 225 calories.
- A no-calorie or low-calorie beverage if the beverage contains no more than 10 calories per 8 ounces, excluding beverages defined by the U.S. Department of Agriculture (USDA) as “Foods of Minimal Nutritional Value” (e.g., soda water).
- A beverage that is not more than 12 ounces and contains no more than 100 calories, excluding beverages defined by the USDA as “Foods of Minimal Nutritional Value.”

### Healthy Parties Guidelines

These healthy snack guidelines apply to food distributed during the school day as part of a celebration or school party.

#### **Encouraged Beverages**

K-5<sup>th</sup> Grade: Beverages limited to water and the following:

- Fruit or vegetable juice, provided the beverage item is not more than 8 ounces, is 100% juice with no added sweeteners and contains no more than 120 calories per 8 ounces.
- Milk or a nutritionally equivalent milk alternative, provided the beverage item is not more than 8 ounces, is fat-free or low-fat and, if flavored, contains no more than 150 calories per 8 ounces.

6-8<sup>th</sup> Grade: Beverages limited to water and the following:

- Fruit or vegetable juice, provided the beverage item is not more than 8 ounces, is 100% juice with no added sweeteners and contains no more than 120 calories per 8 ounces.
- Milk or a nutritionally equivalent milk alternative, provided the beverage item is not more than 8 ounces, is fat-free or low-fat and, if flavored, contains no more than 150 calories per 8 ounces.

9-12<sup>th</sup> Grade: Beverages limited to water and the following:

- Fruit or vegetable juice, provided the beverage item is not more than 12 ounces, is 100% juice with no added sweeteners and contains no more than 180 calories.
- Milk or a nutritionally equivalent milk alternative, provided the beverage item is not more than 12 ounces, is fat-free or low-fat and, if flavored, contains no more than 225 calories.

## Financial Procedures for Schools and Departments FY16

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- A no-calorie or low-calorie beverage if the beverage contains no more than 10 calories per 8 ounces, excluding beverages defined by the U.S. Department of Agriculture (USDA) as “Foods of Minimal Nutritional Value” (e.g., soda water).
- A beverage that is not more than 12 ounces and contains no more than 100 calories, excluding beverages defined by the USDA as “Foods of Minimal Nutritional Value.”

**Not allowed:** Beverages of Minimal Nutritional Value as defined by the USDA (soda water or “pop”.)

### **Encouraged Foods**

- Food items that do not contain any trans fat and have no more than:
- 35% of its calories from fat (excluding legumes, nuts, seeds, nonfried vegetables, cheese, eggs, and other nut butters) and 10% of its calories from saturated (excluding nuts, eggs, and cheese)
- 35% of its weight from added sugars (does not apply to fruit and vegetables)
- 350 mg of sodium per serving for bread, sweets and salty snacks; 480 mg for nutrient-dense snacks, such as nuts, seeds, fruits, vegetables, dairy; 530 mg for pre-packaged entrees, such as “hot pockets,” soups, burritos; 600 mg for freshly made entrees.

### **Portion Sizes**

Portion sizes should be reasonable given the age of the student. Appropriate portion sizes for beverages are noted under “Beverages.”

### **Catering**

Celebrations, the Eugene School District catering service, can assist with appealing and healthy classroom snacks and pizza parties. Call 541-790-7654 or email [catering@4j.lane.edu](mailto:catering@4j.lane.edu) to support your local school district and serve healthy foods and beverages to kids.

**CHECKLISTS**

## Financial Procedures for Schools and Departments FY16

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### Spending Approval Checklist

When approving spending please complete the following checklist:

<input checked="" type="checkbox"/>	Item
<input type="checkbox"/>	1. Is there a description of the educational or district purpose that is served by the expenditure?
<input type="checkbox"/>	2. Is there an agenda or flyer of the meeting or class?
<input type="checkbox"/>	3. Do you approve of the educational purpose?
<input type="checkbox"/>	4. Is there a <u>detailed / itemized listing or invoice</u> of the costs incurred? (Invoices with a confirmation of the cost but no itemized listing are not sufficient for reimbursement.)
<input type="checkbox"/>	5. Is there a listing of people involved?
<input type="checkbox"/>	6. If a good was ordered on a purchase order, does the invoice indicate that the good was received?
<input type="checkbox"/>	7. Is the accounting code correct? Is there budget for this spending?
<input type="checkbox"/>	8. Does the spending comply with federal, state, and local requirements? (There are more requirements if the purchase is for a grant; also see SPENDING AUTHORITY AND CONTROLS sections).
<input type="checkbox"/>	9. Do you have available resources for spending?
<input type="checkbox"/>	10. If this is for travel, is there an approved out of district or out of state form attached?

*Please remember that a signature stamp is not allowed for any use.*

## Financial Procedures for Schools and Departments FY16

### Principal Monthly Checklist

Month:		Date completed:		Completed by:	
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Check	Done	Review Prompt
<b>Weekly</b>		
Review payments made by check and all purchase orders	<input type="checkbox"/>	1. Is there a description of the educational or district purpose that is served by the expenditure?
	<input type="checkbox"/>	2. Is there an agenda or flyer of the meeting or class?
	<input type="checkbox"/>	3. Do you approve of the educational purpose?
	<input type="checkbox"/>	4. Is there a <u>detailed / itemized listing or invoice</u> of the costs incurred? (Invoices with a confirmation of the cost but no itemized listing are not sufficient for reimbursement.)
	<input type="checkbox"/>	5. Is there a listing of people involved?
	<input type="checkbox"/>	6. If a good was ordered on a purchase order, does the invoice indicate that the good was received?
	<input type="checkbox"/>	7. Is the accounting code correct? Is there budget for this spending?
	<input type="checkbox"/>	8. Does the spending comply with federal, state, and local requirements?
	<input type="checkbox"/>	9. Do you have available resources for spending?
	<input type="checkbox"/>	10. If out of district travel, is there an approved out of district or out of state form attached?
Review cash receipt forms	<input type="checkbox"/>	Review receipt of funds forms and ask to see the matching deposit slips from the bank. This is to monitor collection of funds.
<b>Monthly</b>		
Review the bank reconciliation	<input type="checkbox"/>	1. Did you personally sign all of the returned checks?
	<input type="checkbox"/>	2. Do you know about the checks, especially the larger ones?
	<input type="checkbox"/>	3. Do all the school deposits appear to have been made?
	<input type="checkbox"/>	4. Does the bank balance on the bank statement agree with the bank balance on the reconciliation?
<b>Periodically</b>		
Review financial reports and budget to actual	<input type="checkbox"/>	1. Review the school's financial report for expenses to the various accounts; does this agree to your expectations in amounts that have been charged? Check to see if you may run out of funds for various activities.
Verify Petty Cash	<input type="checkbox"/>	2. Count the petty cash – does your total equal the total of petty cash the school should have?

# **FORMS AND TECHNICAL ASSISTANCE**

Most forms and “how-to-guides” are available on 4J Intranet sites. The intranet site is accessed at <http://www.4j.lane.edu/finance/intranet/>. NOTE: Access is only available through a 4J connection or through VPN access.

Financial Services Intranet

**Financial Services** .....  
Working together in a respectful and ethical manner, Financial Services provides high quality financial, food, and warehouse services to our students, staff, and community.

**The Financial Services intranet has moved to a new server.**  
The new URL is <http://www.4j.lane.edu/finance/intranet/>. If you arrived at this page using a bookmark to [fsweb.lane.edu](http://fsweb.lane.edu), please update your bookmark(s).

**Budget Preparation**  
Budget calendar, guidelines, and building allocations.

**Payroll Information**  
Payroll schedules and forms. If you need to change your W-4 or submit a travel expenses, you can download the form from this page.

**Practices and Procedures**  
Documents related to Financial Services department operations, including the Financial Policies and Procedures Manual for Schools and Departments.

**Lawson**  
Information on Lawson Business Systems, including logging in, Internet Explorer settings, new user access, and troubleshooting.

**Forms and Documents**  
Links to many Financial Services forms and documents.

**Legacy Business Systems**  
Information on older business systems that have not yet been replaced by Lawson.

Financial Services Intranet

- [Home](#)
  - [Chart of Accounts \(PDF Document\)](#)
  - [Financial Procedures \(PDF Document\)](#)
- [Budget Preparation](#)
- [Payroll Information](#)
- [Practices and Procedures](#)
- [Lawson](#)
  - [Request New User Setup and Change Access](#)
  - [Lawson Employee Self-Service](#)
  - [Lawson Manager Self Service](#)
  - [Lawson Troubleshooting](#)
  - [Lawson Internet Explorer Configuration](#)
  - [Lawson Requirements](#)
  - [Lawson User Guides and Instructions](#)
- [Forms & Documents](#)
- [Legacy Business Systems](#)

Each of the sections are updated as policies, procedures, forms, and technology change. Contact anyone in Financial Services for help with finding documents.

We appreciate suggestions for “how-to-guides” and other technical assistance such as screen-shot guides.

# Eugene School District 4J

Code: **JF/JFA**  
Adopted: 11/21/77; 6/16/75  
Readopted: 5/21/14  
Orig. Code(s): JF; JFA

## Student Rights and Responsibilities\*\*

The Board has the responsibility to afford students the rights that are theirs by virtue of guarantees offered under federal and state constitutions and statutes. In connection with rights are responsibilities that must be assumed by students.

Among these student rights and responsibilities are the following:

1. Civil rights – including the rights to equal educational opportunity and freedom from discrimination; the responsibility not to discriminate against others;
2. The right to attend free public schools; the responsibility to attend school regularly and to observe school rules essential for permitting others to learn at school;
3. The right to due process of law with respect to suspension, expulsion and decisions which the student believes injure his/her rights;
4. The right to free inquiry and expression; the responsibility to observe reasonable rules regarding these rights;
5. The right to privacy, which includes privacy with respect to the student's education records.

Students have the right to know the behavior standards expected of them as well as to know the consequences of misbehavior.

Students' rights and responsibilities, including standards of conduct, are outlined in the Student Rights & Responsibilities Handbook. The handbook will be made available on the district's website, at school sites, and at the district office.

END OF POLICY

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### Legal Reference(s):

[ORS 332.061](#)  
[ORS 332.072](#)  
[ORS 337.150](#)  
[ORS 339.155](#)

[ORS 339.240](#)  
[ORS 339.250](#)  
[ORS 659.850](#)  
[ORS 659.865](#)

[OAR 581-021-0045](#)  
[OAR 581-021-0046](#)  
[OAR 581-021-0050 to -0075](#)  
[OAR 581-022-1140](#)

Hazelwood Sch. District v. Kuhlmeier, 484 U.S. 260 (1988).  
Bethel Sch. Dist. v. Fraser, 478 U.S. 675 (1986).

### Cross Reference(s):

JFC - Standard for Student Conduct and Discipline

# Eugene School District 4J

Code: **JG**  
Adopted: 7/02/73  
Readopted: 8/02/76; 8/15/77; 5/21/14  
Orig. Code(s): 3890; 5700

## Student Discipline

The right of students to attend public school is guaranteed by law. Along with this right is the student's responsibility to follow reasonable rules designed to assure the safety and orderly educational process for all students and school personnel.

To ensure a school climate that is appropriate for student learning, repeated minor violations or a single serious violation of school rules may result in a range of consequences for the student including suspension or expulsion from school. Students are subject to disciplinary action for behavior while traveling to and from school and while off campus whenever such behavior has a direct effect on the general welfare of the school and its students and adults.

The Eugene School District 4J school board believes that the desired outcome of student discipline is student learning. Although consequences for violating school rules may result in hardships for students requiring discipline, administrators will work diligently with students and their families to seek solutions that both ensure safety for all students and school personnel and result in positive learning for students.

Further, the board believes disciplinary action must be applied fairly and equitably with the intent of eliminating disparities across all student sub groups.

In all disciplinary cases students will have due process rights, which at minimum will guarantee them a right to hear the charges and an opportunity to provide their perspectives.

Specific rights and responsibilities of students are published in the *Students Rights and Responsibilities Handbook*.

END OF POLICY

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### Legal Reference(s):

[ORS 243.650](#)  
[ORS 332.061](#)  
[ORS 332.072](#)

[ORS 332.107](#)  
[ORS 339.115](#)  
[ORS 339.240](#) to -339.280

[OAR 581-021-0045](#)  
[OAR 581-021-0050](#) to -0075

### Cross Reference(s):

JFC - Student Conduct  
JGD - Suspension  
JGE - Expulsion



## Use of Restraint and Seclusion

The Board is dedicated to the development and application of best practices within the district's public educational/behavioral programs. It is the intent of the Board to establish a policy that defines the circumstances that must exist and the requirements that must be met prior to, during and after the use of restraint and/or seclusion as an intervention with district students.

### Definitions

1. "Physical restraint" means the restriction of a student's movement by one or more persons holding the student or applying physical pressure upon the student. "Physical restraint" does not include touching or holding a student without the use of force for the purpose of directing the student or assisting the student in completing a task or activity. The definition of "physical restraint" does not include the use of mechanical, chemical or prone restraint of a student as these methods are prohibited by Oregon law.
2. "Seclusion" means the involuntary confinement of a student alone in a room from which the student is physically prevented from leaving.

Seclusion does not include the removal of a student for a short period of time to provide the student with an opportunity to regain self-control, in a setting from which the student is not physically prevented from leaving.

3. "Serious bodily injury" means any significant impairment of the physical condition of a person, as determined by qualified medical personnel, whether self-inflicted or inflicted by someone else.
4. "Mechanical restraint" means a device used to restrict the movement of a student or the movement or normal function of a portion of the body of a student.

Mechanical restraint does not include:

- a. A protective or stabilizing device ordered by a licensed physician; or
  - b. A vehicle safety restraint when used as intended during the transport of a student in a moving vehicle.
5. "Chemical restraint" means a drug or medication that is used on a student to control behavior or restrict freedom of movement that has not been prescribed by a licensed health professional or other qualified health care professional acting under the professional's scope of practice.
  6. "Prone restraint" means a restraint in which a student is held face down on the floor.

The use of physical restraint and/or seclusion is only permitted as part of a behavioral support plan when other less restrictive interventions would not be effective and the student's behavior poses a threat of imminent, serious physical harm to the student or others.

Except in the case of an emergency, only staff current in the required training in accordance with the district-designated physical restraint and seclusion training program will implement physical restraint or seclusion with a student. In an emergency, physical restraint and/or seclusion may also be used by a school administrator, teacher, or other school employee as necessary when the student's behavior imposes a reasonable threat of imminent, serious bodily injury to the student or others. The use of physical restraint/seclusion under these circumstances is only allowed so long as the student's behavior poses a threat of imminent, serious physical harm to themselves or to others. Any student being restrained or secluded within the district whether in an emergency or as a part of a plan shall be constantly monitored by staff for the duration of the intervention. Any room used for seclusion of a student must allow staff full view of the student in all areas of the room and be free of potentially hazardous conditions such as unprotected light fixtures and electrical outlets.

The district shall utilize the Oregon Intervention System (OIS) or the Mandt System training program of physical restraints and seclusion for use in the district. As required by State regulation, the selected program shall include: behavior support, prevention, de-escalation, and crisis response techniques. Any program selected by the district must be in compliance with state and federal law with respect to the use of restraint and/or seclusion.

An annual review of the use of physical restraint and seclusion, including a review of all district cases involving restraint and/or seclusion, shall be completed to ensure compliance with district policies and procedures. The result of the annual review shall be documented and shall include at a minimum:

1. The total number of incidents of restraint;
2. The total number of incidents of seclusion;
3. The total number of seclusions in a locked room;
4. The total number of students placed in physical restraint;
5. The total number of students placed in restraint and/or seclusion more than 10 times in a school year;
6. The total number of restraint and seclusion incidents carried out by untrained individuals;
7. The demographic characteristics of all students upon whom physical restraint and/or seclusion was imposed.

This report shall be made available to the Board and to the public at the district's main office and on the district's website.

At least once each school year the public shall be notified as to how to access the report.

The district shall investigate all complaints regarding the use of restraint and/or seclusion practices according to the procedures outlined in Board policy KL and KL-AR - Public Complaints.

The superintendent shall develop administrative regulations to carry out the requirements set forth in this policy and to meet any additional requirements established by law related to the use, reporting and written documentation of the use of physical restraint or seclusion by district personnel.

END OF POLICY

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**Legal Reference(s):**

[ORS 161.205](#)

[ORS 339.250](#)

[OAR 581-021-0061](#)

[OAR 581-021-0062](#)

[OAR 581-021-0550](#)

[OAR 581-021-0553](#)

[OAR 581-021-0556](#)

[OAR 581-021-0559](#)

[OAR 581-021-0563](#)

[OAR 581-021-0566](#)

**Cross Reference(s):**

JGDA/JGEA - Discipline of Students with Disabilities

# **ADMINISTRATIVE RULE JGAB/AR - DRAFT**

## **Use of Restraint and Seclusion**

### **General Guidelines for use of physical restraint or seclusion**

1. Physical restraint or seclusion may be used on a student only if the student's behavior imposes a reasonable threat of imminent, serious bodily injury to the student or others and less restrictive interventions would not be effective. Except in case of an emergency, only staff with current training in the District's restraint or seclusion program will administer a physical restraint or seclusion. S
2. An administrator will be notified as soon as practicable whenever physical restraint and/or seclusion has been used.
3. If restraint or seclusion continues for more than 30 minutes the student must be provided with adequate access to bathroom and water every 30 minutes. If physical restraint or seclusion continues for more than 30 minutes, every 15 minutes after the first 30 minutes an administrator for the public education program must provide written authorization for the continuation of the physical restraint or seclusion, including providing documentation for the reason the physical restraint or seclusion must be continued. Whenever physical restraint or seclusion extends beyond 30 minutes, personnel of the district will immediately attempt to verbally or electronically notify a parent.

### **Post-restraint or seclusion procedures**

1. Parents will be provided verbal or electronic notification by the school staff following the use of physical restraint or seclusion by the end of the day on which the incident occurred.
2. Parents will be provided written documentation of the incident within 24 hours that provides:
  - a. A description of the physical restraint and/or seclusion;
  - b. The date of the physical restraint or seclusion;
  - c. The time the physical restraint or seclusion began and ended, and the location;
  - d. A description of the student's activity that prompted the use of physical restraint or seclusion.
  - e. The efforts used to de-escalate the situation and the alternatives to physical restraint or seclusion that were attempted;
  - f. The names of personnel of the public education program who administered the physical restraint or seclusion and a description of the training status of those who administered the restraint or seclusion. If the physical restraint or seclusion was administered by a person without training the district will provide that information along with the reason why a person without training administered the restraint or seclusion.
3. Parents will be given timely notice of a debriefing meeting to be held and their right to attend the meeting.
4. A district Physical Restraint and/or Seclusion Incident Report must be completed and copies provided to those attending the debriefing meeting for review and comment.

5. A documented debriefing meeting must be held within two school days after the use of physical restraint and/or seclusion; staff members involved in the intervention must be included in the meeting. The debriefing team shall include an administrator. Written notes will be taken at the debriefing meeting, a copy of which must be provided to the parent/guardian.
6. If a student is involved in five incidents in a school year involving physical restraint or seclusion, a team consisting of the District's personnel and a parent or guardian of the student will be formed for the purpose of reviewing and revising the student's behavior plan and ensuring the provision of any necessary behavioral supports.
7. If serious bodily injury or death of a student occurs in relation to the use of physical restraint, written notice must be provided within 24 hours of the incident to the Department of Human Services. If any serious bodily injury or death of a District employee occurs in relation to the use of physical restraint or seclusion, the administrator will provide written notice of the incident within 24 hours to the superintendent and the union representative of the employee. The District will maintain a record of each incident in which injuries or death occurs in relation to the use of physical restraint or seclusion.

**Physical restraint/seclusion as a part of a behavioral support plan in the student's Individual Education Program (IEP) or Section 504 plan.**

8. Parent participation in the plan is required.
9. The IEP team that develops the behavioral support plan shall include knowledgeable and trained personnel, including a behavioral specialist and a district representative who is familiar with the physical restraint training practices adopted by the district.
10. Prior to the implementation of any behavioral support plan that includes restraint and/or seclusion a functional behavioral assessment must be completed. The assessment plan must include an individual threshold for reviewing the plan.

**Reporting Requirements**

1. The District will prepare and submit to the Superintendent of Public Instruction an annual report detailing the use of physical restraint and seclusion for the preceding school year, in accordance with law and Board policy. The report shall also be made available to the board and members of the public.

Citings:	OAR 581-021-0550
Board: JGAB	OAR 581-021-0053
	OAR 581-021-0056
State:	OAR 581-021-0059
ORS 339.250	
Ch. 665, Oregon Laws 2011	

# Eugene School District 4J

Code: **JB**

Adopted: 2/03/88

Readopted: 6/17/98; 4/30/03; 6/06/07;  
8/19/09; 9/05/12; 5/20/15

Orig. Code(s): 5205

## **Harassment, Intimidation, Bullying, Cyberbullying, Hazing and Teen Dating Violence**

Each student has a right to a safe learning environment. Harassment, intimidation, bullying, cyberbullying or hazing of students is prohibited. Teen dating violence is unacceptable behavior and prohibited. Students may face disciplinary consequences for any off-campus behavior that would disrupt the educational process or the operation of the school or district.

A student or staff member may not engage in reprisal or retaliation against a victim of, witness to or person with reliable information about an act of harassment, intimidation, bullying, cyberbullying, hazing or teen dating violence. Retaliation against any person who reports, is thought to have reported, files a complaint or otherwise participates in an investigation or inquiry is prohibited. Such retaliation shall be considered a serious violation of Board policy independent of whether a complaint is substantiated. False charges shall also be regarded as a serious offense and will result in disciplinary action or other appropriate sanctions.

Students whose behavior is found to be in violation of this policy will be subject to discipline, up to and including expulsion. The district may also file a request with the Oregon Department of Transportation to suspend the driving privileges or the right to apply for driving privileges of a student 15 years of age or older who has been suspended or expelled at least twice for menacing another student or employee, for willful damage or injury to district property, or for the use of threats, intimidation, harassment or coercion. Students may also be referred to law enforcement officials.

1. “Harassment, intimidation or bullying” means any act that:
  - a. Substantially interferes with a student’s educational benefits, opportunities or performance;
  - b. Takes place on or immediately adjacent to school grounds, at any school-sponsored activity, on school-provided transportation or at any official school bus stop;
  - c. Has the effect of:
    - (1) Physically harming a student or endangering a student’s property;
    - (2) Knowingly placing a student in reasonable fear of physical harm to the student or damage to the student’s property; or
    - (3) Creating a hostile educational environment, including interfering with the psychological well-being of a student.
  - d. May be based on, but is not limited to, the protected class status of a person.

2. “Protected class” means a group of persons distinguished, or perceived to be distinguished, by race, color, religion, sex, sexual orientation<sup>1</sup>, gender identity or expression, national origin, marital status, familial status, source of income or disability.
3. “Cyberbullying” means the use of any electronic communication device to harass, intimidate or bully.
4. “Hazing” means intentionally taking action or creating a situation that inflicts physical harm, psychological harm or distress on a student regardless of the consent or location of the participants.
  - a. Hazing occurs when the action or situation has the purpose or effect of demeaning or humiliating a student or group of students.
  - b. Hazing is typically but not exclusively committed as a form of initiation, discipline or rite of passage for a particular club, team or activity, and almost always includes new members showing subservience to existing members.
  - c. In considering a hazing case, it is not a defense that the student subjected to hazing consented to or acquiesced in the hazing activity
5. “Teen dating violence” means:
  - a. A pattern of behavior in which a person uses or threatens to use physical, mental or emotional abuse to control another person who is in a dating relationship with the person, where one or both persons are 13 to 19 years of age; or
  - b. Behavior by which a person uses or threatens to use sexual violence against another person who is in a dating relationship with the person, where one or both persons are 13 to 19 years of age.
6. Staff’s Responsibility: Staff, including student teachers and practicum students, are required to report an act of harassment, intimidation, bullying or cyberbullying to the staff member on duty at the time or to the student’s teacher or to the principal or assistant principal. If the principal is believed to be involved, the report may be made to the Superintendent’s office. Failure of an employee to report an act of harassment, intimidation, bullying or cyberbullying may be subject to remedial action, up to and including dismissal. Remedial action may not be based solely on an anonymous report.

A staff member who has knowledge of an incident of teen dating violence that took place on district property, at school-sponsored activities or in vehicles used for school-provided transportation is encouraged to immediately report the incident, following the reporting and complaint procedures in this policy.
7. Informing Volunteers and Others: Staff are responsible for informing volunteers and other adults working in schools and with extracurricular programs of this policy and for supervising their activities.

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<sup>1</sup>“Sexual orientation” means an individual’s actual or perceived heterosexuality, homosexuality, bisexuality or gender identity, regardless of whether the individual’s gender identity, appearance, expression or behavior differs from that traditionally associated with the individual’s sex at birth.

8. Student Responsibility: Students are expected to follow the standards for student behavior outlined in school board policy and the district's *Student Rights and Responsibilities Handbook*, which includes the requirement that they refrain from intimidation, bullying, harassment, discrimination, and hazing and comply with this policy.
  - a. Students are expected to hold their peers and other students to the standards established by this policy and are encouraged to bring violations to the attention of a teacher, counselor or administrator. These reports may be made anonymously.
  - b. Students who violate this rule are liable for discipline, suspension or expulsion following the rules established in the *Student Rights and Responsibilities Handbook*.
9. Tracking: The district and its staff will track incidents of harassment, intimidation, bullying, cyberbullying and hazing and report this information annually to the Board.
10. Training: The district shall provide for the training of staff and students on the contents of this policy and the prevention of and appropriate response to acts of harassment, intimidation, bullying, cyberbullying, hazing and teen dating violence.

The district shall provide age-appropriate education about teen dating violence for students in grades 7-12.

11. Reporting and Complaint Procedures:
  - a. A student, his or her parent or guardian, or a volunteer who believes that the student is the recipient of harassment, intimidation, bullying, cyberbullying or hazing from another student, staff member, or volunteer is encouraged to report the incident to the staff member on duty at the time or to the student's teacher or to the principal or assistant principal. If the principal is believed to be involved, the report may be made to the Superintendent's office. Information may be presented anonymously. Teachers and other staff who observe students engaging in harassing, intimidating, bullying, cyberbullying or hazing behaviors are responsible for taking action to deal with the behavior and are required to report the incident.
  - b. A student and his or her parent or guardian are encouraged to attempt to resolve concerns through discussions with school staff. Upon a report, or knowledge of, an incident, the principal or person assigned by the principal to resolve the issue shall investigate the incident. The investigation shall include interviews of the complainant and the individual(s) alleged to have acted improperly. The principal or person assigned shall work with the complainant and other parties to resolve the issue.
  - c. If the student or his or her parent or guardian are unable to resolve the complaint after working with school staff, they are encouraged to file a complaint of discrimination or harassment with the superintendent's office, using a form available in school offices and from the Superintendent's office. The superintendent will follow the procedure outlined in the *Student Rights and Responsibilities Handbook* and the district's complaint process and will send a written acknowledgment, postmarked within 10 working days of receiving the complaint, which will identify the person who has been assigned to handle the complaint.
  - d. There will be an attempt to assist students and/or parents in resolving concerns and issues prior to the use of the formal disciplinary or complaint procedures. This may include counseling, education, mediation and/or other opportunities for problem solving between both parties. However, the severity of a specific incident may require immediate disciplinary action.



12. Annual Review: This policy and any procedures developed as a result of this policy will be reviewed annually, in the fall, with each building and department staff.
13. Publicizing this Policy: This policy shall be publicized within the district by making the policy annually available to parents, guardians, school employees and students in the student handbook, and readily available to parents, guardians, school employees, volunteers, students, school administrators and community representatives at each school office, the school district office and the district website.
14. The superintendent is responsible for developing appropriate administrative rules, procedures or guidelines for implementation of this policy, as needed.

END OF POLICY

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**Legal Reference(s):**

[ORS 174.100](#)  
[ORS 192.630](#)  
[ORS 326.051](#)  
[ORS 329.025](#)  
[ORS 329.035](#)  
[ORS 336.067](#)  
[ORS 336.082](#)

[ORS 336.086](#)  
[ORS 342.123](#)  
[ORS 659.850](#)  
[ORS Chapter 659](#)  
[ORS Chapter 659A](#)  
[ORS 659A.003](#)  
[ORS 659A.006](#)

[ORS 659A.030](#)  
[OAR 581-021-0045](#)  
[OAR 581-021-0046](#)  
[OAR 581-022-1140](#)  
[OAR 839-003-0000](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2006).  
 Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2006).  
 Rehabilitation Act of 1973, 29 U.S.C. §§ 791, 793-794 (2006).  
 Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2006); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2006).  
 Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213; 29 C.F.R. Part 1630 (2006); 28 C.F.R. Part 35 (2006).  
 Americans with Disabilities Act Amendments Act of 2008.

**Cross Reference(s):**

AC - Nondiscrimination



Eugene School District

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*dealing with*

**Bullying,  
Harassment &  
Discrimination**

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*district procedures, complaint  
processes, forms & guides*

revised August 2014

**Table of Contents**

Introduction.....	2
Instructions for communicating the bullying, harassment and discrimination prevention and reporting process.....	3
Instructions for incident recording/Synergy .....	3
Instructions for using complaint form.....	3
Tracking.....	3
Step-by-step processes	
Complainant (students, parents, etc.) .....	4–5
Roles for staff: Teachers and classified .....	6
Roles for staff: Principal or responsible administrator .....	6
Roles for staff: District director.....	7–8
Guidelines for assessing and reporting incidents.....	9–11
Documenting incidents.....	11
Handout to inform complainants of the process and their rights .....	13–14
Complaint form .....	15–16

**Introduction**

To be their best and meet new challenges, students need to experience school as a safe and welcoming environment. Bullying, harassment and discrimination have no place in the Eugene School District, nor in any school.

4J’s school board policies expressly denounce and forbid bullying and harassment (including intimidation, cyberbullying, hazing and teen dating violence) and discrimination. When this behavior occurs, we will deal with it seriously. We are always working on school-wide and district-wide programs to improve student conduct to make schools safer and friendlier.

Staff, including student teachers and practicum students, are *required* to report any act of bullying or harassment to the staff member on duty at the time or to the student’s teacher or to the principal or assistant principal. If the principal is believed to be involved, the report may be made to the superintendent’s office. Failure to report an act of bullying or harassment may be subject to remedial action, up to and including dismissal.

A staff member who has knowledge of an incident of teen dating violence that took place on district property, at school-sponsored activities or in vehicles used for school-provided transportation is encouraged to immediately report the incident following the reporting and complaint procedures in this policy.

Pages 1–16 of this guide are intended for district administrators and staff who need information on investigating, filing, pursuing or resolving a complaint or incident of bullying, harassment or discrimination. Pages 17–20 are a pull-out section for students, parents and anyone else who needs information on filing and resolving a complaint or incident of bullying, harassment or discrimination.

**Instructions for communicating the bullying, harassment and discrimination prevention and reporting process**

1. Schools will share this information with staff each year.
2. Schools will share this information with students each year. Schools may determine the best way to do this. Principals will document the communication method used.
3. Schools will share this information with parents. Schools may determine the best way to do this; again principals will document the communication method used.
4. ALL incidents involving bullying or harassment (including intimidation, cyberbullying, hazing and teen dating violence) or discrimination must be reported electronically in Synergy.
5. Schools will be required to report to the district annually on their efforts to prevent and respond to such incidents.

**Instructions for incident recording/Synergy**

Each incident of harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence or discrimination MUST be entered by staff into Synergy. No paper duplicate is required. For more information, see the “Guidelines to Assessing and Reporting Incidents” and “Documenting Incidents” in this booklet.

A key staff member in each building should be trained in entering discipline referrals into Synergy. Please visit [4j.lane.edu](http://4j.lane.edu)→Staff→Workshops→Synergy Training. For additional information on Synergy, please contact the Technology department at 541-790-7770 or visit <http://www.4j.lane.edu/technology/is/synergy/>.

**Instructions for using complaint form**

There is only one paper complaint form, and it can be used by any person to describe an incident of bullying or harassment of any kind, or to describe an incident of discrimination. It is intended to be used after attempting to resolve an issue at the school level. It should not be used in place of a school “incident report” form, since it sets into motion a series of serious steps at the district level. The complaint form is available in school offices and from the superintendent’s office, 200 North Monroe Street. There is no district-level “informal” complaint form.

**Tracking**

Reports of bullying, harassment and discrimination are recorded and analyzed by district staff to look for trends. By regularly evaluating bullying, harassment and discrimination incidents in the district, staff can identify better ways to identify patterns, combat and resolve these incidents. It’s also a way to see if the district’s practices to prevent such incidents are effective. The district and its staff will track incidents and report this information annually to the school board.

## Step-by-step process

### Complainant (includes students, parents, etc.)

1. If you observe or experience an incident of bullying or harassment (including intimidation, cyberbullying, hazing and teen dating violence) or of discrimination, you should contact the school principal or other staff member to report it. Say you would like to report an incident of harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence or discrimination.

If you believe the principal is involved in the incident, you don't have to report to him or her. You may instead contact the district superintendent's office—skip to step 4.

2. Tell the principal or person assigned by the principal or superintendent what happened and answer any questions they have.
3. Work with the principal or person assigned by the principal or superintendent to resolve the issue. This could include talking with a teacher and discussing what may happen with the involved people. The goal of resolving the issue is to 1) protect and comfort the person who feels they've been a target of bullying, harassment or discrimination, 2) assign a consequence if necessary and 3) teach the parties skills that help make school safe and welcoming.
4. If you are unable to resolve the issue by working with the school principal and/or school staff, you may file a formal complaint with the district. There is a single complaint form for use by anyone. It is available from school offices and from the 4J superintendent's office, 200 N. Monroe St. (541-790-7707). Fill out the form completely and return it to the 4J superintendent's office.
5. The superintendent's office will send you a written acknowledgement, postmarked within 10 (ten) working days of receiving the complaint. The acknowledgement will tell you the date the superintendent received the complaint and who has been assigned to handle the complaint.

If the complaint has not yet been addressed at the school level, it will be referred to the principal to follow up (see steps 2–3). (If the principal or supervisor is the subject of the complaint, this step is bypassed.) If you have worked with the school or department but have been unable to resolve the issue, the superintendent will assign a person to follow up on the complaint. This person is the superintendent's designee.

6. As an alternative to a district investigation, the superintendent's designee may offer voluntary mediation as a way of resolving the complaint. If the parties choose voluntary mediation, the timelines provided in this process may be suspended during the course of mediation. Mediation shall take place within a time frame agreed to by the parties. Upon agreement by both parties, mediated resolutions will be put in writing and will be binding upon the parties involved.

7. If mediation or another alternative resolution isn't practical, the superintendent's designee will initiate a district investigation of the complaint. The investigation will include interviews of the complainant and the individual(s) alleged to have acted improperly. The superintendent's office will ensure that parents are informed if their student is involved in the complaint.

The superintendent's designee may assign an individual to investigate the complaint, determine the facts, and recommend possible ways of resolving the complaint. In that case, the superintendent's designee will review the findings and recommendations of the investigator and provide this information to the superintendent. The superintendent will send a written decision to the complainant, postmarked within 20 (twenty) working days of the date the superintendent's office received the complaint.

8. A parent, student, or community member who is not satisfied with how the complaint was resolved by the superintendent may appeal to the school board. If the complainant chooses to file an appeal with the school board, it must be received in the superintendent's office within 10 (ten) working days after the complainant receives a decision from the superintendent.

The school board will determine whether or not to hear the complaint within 10 (ten) working days of receiving the appeal. The school board's decision will be based on the written appeal and the record of the investigation.

The written appeal to the school board shall include the following:

- a. A detailed description of the grounds for the appeal, including the reasons for rejecting the response given by the superintendent.
  - b. Name of the complainant's representative, if any, such as an attorney or advocate.
  - c. The date the formal complaint was filed.
  - d. Copies of any additional supporting documentation that was *not* included in the original complaint.
9. If the school board determines that a hearing is warranted, the school board may refer the matter to the district's hearings officer. If the school board determines that a hearing is not warranted, the school board will notify the complainant and inform him or her of the right to file a complaint directly with the state or federal government.
  10. If the school board refers the complaint to the district's hearings officer, the school board shall forward the appeal and all relevant materials to the hearings officer within 10 (ten) working days of receiving the appeal. The hearings officer will schedule a hearing within 20 (twenty) working days of receiving the appeal. The appeal hearing will be closed to the public. The confidentiality of students, student records, employees and employee records will be maintained to the extent allowed by federal and state law. The decision of the hearings officer will be in writing and will be made part of the record. His or her decision shall be supported by findings of fact and conclusions, and will be binding on all parties. The hearings officer may affirm, modify or reverse the decision made by the superintendent, including providing a different remedy for the complainant and/or directing corrective actions to prevent future recurrence of any bullying, harassment or discrimination.

**Roles for staff: Teachers and classified**

1. If you observe an incident of bullying or harassment (including intimidation, cyberbullying, hazing or teen dating violence) or discrimination, stop the incident and provide correction (if appropriate). Make sure the victims are safe and as comfortable as possible.
2. Report the incident promptly to your principal or supervisor. **THIS IS REQUIRED** by state law.
3. Assist the principal or supervisor in filing electronic incident reports.
4. If necessary, cooperate with the principal, superintendent, superintendent's designee or other administrators in an investigation of the incident.
5. For teachers, create a plan for any students involved that will teach that bullying, harassment and discrimination are unacceptable. Make a plan to reintegrate the involved students in a healthy classroom atmosphere.
6. Be sensitive to any later incidents of bullying, harassment or discrimination, especially retaliation. Look for patterns. Keep a line of communication with your principal and the parents.

**Roles for staff: Principal or responsible administrator**

1. If you observe an incident of bullying or harassment (including intimidation, cyberbullying, hazing or teen dating violence) or discrimination, stop it and provide correction.
2. Whether you observe the incident or are notified of it by another person, make sure the incident is entered into Synergy promptly and accurately. **THIS IS REQUIRED**. If you did not observe the incident, make sure to talk to the involved parties. If you are not sure about whether the incident qualifies as harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence or discrimination, turn to pages 9–11 of this manual for more detailed guidelines and an assessment form.
3. If the incident is particularly unusual or egregious, call the office of the superintendent at 541-790-7707 to brief them by phone.
4. The same day as the incident, contact the parents or guardians of any students involved. Inform them of the incident and the bullying, harassment and discrimination process. Answer any questions they have.
5. If necessary, investigate the incident further. Talk to all involved parties. Take legible notes and save them.
6. Develop and implement any medium- or long-term corrective plans for the involved parties; again, take notes.
7. If a complaint is filed, you will need to provide information as necessary to the superintendent, superintendent's designee or hearings officer.

**Roles for staff: District director**

1. If you hear about an incident of bullying or harassment (including intimidation, cyber-bullying, hazing or teen dating violence) or discrimination, make sure the principal has the information and help necessary to promptly report the incident and resolve it at the building level, if possible.
2. If the complainant has worked with the school or department to resolve the complaint and is not satisfied with the resolution at the building level, they may file a formal complaint with the superintendent's office. There is a single complaint form for use by anyone, available from school offices and from the superintendent's office (200 N. Monroe St., 541-790-7707).
3. When a complaint form is received, if the complaint has not yet been addressed at the school level, it will be referred to the principal to follow up. (If the principal or supervisor is the subject of the complaint, this step is bypassed.) Otherwise, the superintendent will notify the appropriate director and assign a designee to handle the complaint. The superintendent may ask you to review and discuss the complaint before making a decision regarding how to proceed.
4. As an alternative to a formal investigation, the superintendent's designee may offer voluntary mediation as a way of resolving the complaint. If the parties choose voluntary mediation, the timelines provided in this process may be suspended during the course of mediation. Mediation shall take place within a time frame agreed to by the parties. Upon agreement by both parties, mediated resolutions will be put in writing and will be binding upon the parties involved.
5. If mediation or another alternative resolution isn't feasible, the superintendent's designee will initiate a district investigation of the complaint. The investigation will include interviews of the complainant and the individual(s) alleged to have acted improperly. The superintendent's office will ensure that parents are informed if their student is involved in the complaint.

The superintendent's designee may assign an individual to investigate the complaint, determine the facts, and recommend possible ways of resolving the complaint. In that case, the superintendent's designee will review the findings and recommendations of the investigator and provide this information to the superintendent. The superintendent will send a written decision to the complainant, postmarked within 20 (twenty) working days of the date the superintendent's office received the complaint.

5. A parent, student or community member who is not satisfied with how the complaint was resolved by the superintendent may appeal to the school board. If the complainant chooses to file an appeal with the school board, it must be received in the superintendent's office within 10 (ten) working days after the complainant receives a decision from the superintendent.



The school board will determine whether or not to hear the complaint within 10 (ten) working days of receiving the appeal. The school board's decision will be based on the written appeal and the record of the investigation.

The written appeal to the school board shall include the following:

- a. A detailed description of the grounds for the appeal, including the reasons for rejecting the response given by the superintendent.
  - b. Name of the complainant's representative, if any, such as an attorney or advocate.
  - c. The date the formal complaint was filed.
  - d. Copies of any additional supporting documentation that was *not* included in the original complaint.
6. If the school board determines that a hearing is warranted, the school board may refer the matter to the district's hearings officer. If the school board determines that a hearing is not warranted, the school board will notify the complainant and inform him or her of the right to file a complaint directly with the state or federal government.
  7. If the school board refers the complaint to the district's hearings officer, the school board shall forward the appeal and all relevant materials to the hearings officer within 10 (ten) working days of receiving the appeal. The hearings officer will schedule a hearing within 20 (twenty) working days of receiving the appeal. The appeal hearing will be closed to the public. The confidentiality of students, student records, employees, and employee records, will be maintained to the extent allowed by federal and state law. The decision of the hearings officer will be in writing and be made part of the record. His or her decision shall be supported by findings of fact and conclusions, and will be binding on all parties. The hearings officer may affirm, modify, or reverse the decision made by the superintendent, including providing a different remedy for the complainant, and/or directing corrective actions to prevent future recurrence of any bullying, harassment or discrimination.

## **Guidelines for assessing and reporting incidents of bullying, harassment and discrimination**

Eugene School District 4J prohibits harassment, intimidation, bullying, cyberbullying and hazing. Teen dating violence is unacceptable behavior and prohibited. Students may face disciplinary consequences for any off-campus behavior that would disrupt the educational process or the operation of the school or district. The district prohibits discrimination and expects that staff, including student teachers and practicum students, volunteers and students, will provide equal treatment and access to educational programs, services, and aid to students. Retaliation against any person who reports, is thought to have reported, files a complaint or otherwise participates in an investigation or inquiry is prohibited. False charges shall also be regarded as a serious offense and will result in disciplinary action or other appropriate sanctions.

### **Defining incidents**

*Source: School Board Policies JB and AC, Student Rights & Responsibilities Handbook, SB 1555, HB 4077*

- **Harassment, intimidation or bullying** means any act that substantially interferes with a student's educational benefits, opportunities or performance; takes place on or immediately adjacent to school grounds, at any school-sponsored activity, on school-provided transportation or at any official school bus stop; and has the effect of physically harming a student or endangering a student's property, knowingly placing a student in reasonable fear of physical harm to the student or damage to the student's property, or creating a hostile educational environment, including interfering with the psychological well-being of a student. It may or may not be based on the protected class status of a person or group. ("Protected class" means a group of persons distinguished, or perceived to be distinguished, by race, color, religion, sex, sexual orientation, national origin, marital status, familial status, source of income or disability.)
- **Cyberbullying** is the use of any electronic communication device to harass, intimidate or bully.
- **Hazing** means intentionally taking action or creating a situation that inflicts physical harm, psychological harm or distress on a student regardless of the consent or location of the participants. Hazing occurs when the action or situation has the purpose or effect of demeaning or humiliating a student or group of students. Hazing is typically but not exclusively committed as a form of initiation, discipline or rite of passage for a particular club, team or activity and almost always includes new members showing subservience to existing members. In considering a hazing case, it is not a defense that the student subjected to hazing consented to or acquiesced in the hazing activity.
- **Teen dating violence** means a pattern of behavior, within a dating relationship, in which a person uses or threatens to use physical, mental or emotional abuse to control another person, or threatens sexual violence against another person, when one or both persons in the dating relationship are 13–19 years of age. School employees must respond to incidents of teen dating violence that take place at the school, on school grounds, at school-sponsored activities or in vehicles used for school-provided transportation.
- **Discrimination** means any act that has the purpose or effect of unreasonably differentiating in treatment based on race, color, religion, sex, sexual orientation, national origin, marital status, age or disability.

**Guide for Assessing Incidents**

Answer yes or no for each item. Unmarked items call for investigation.

In most cases, any questions marked with a star (★) and answered “yes” can be automatically determined to be harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence, discrimination or retaliation. These behaviors *require* documentation in Synergy.

Any other questions answered “yes” should cause the reviewer to carefully consider the incident, paying particular attention to clues that might indicate the presence of harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence, discrimination or retaliation. Although there is no “formula” for labeling incidents, the number and pattern of “yes” answers should assist the reviewer in making his/her determination.

If doubt remains, DO report the incident in eSIS as “harassment,” “intimidation,” “bullying,” “cyberbullying,” “hazing,” “teen dating violence,” “discrimination” or “retaliation.” Document the incident regardless of whether it is deemed reportable or not—see next page.

<b>SEVERITY</b>	<b>YES</b>	<b>NO</b>
★ Were there implied or overt threats of physical violence, threats of physical acts of aggression or assault, blocking someone’s way, grabbing inappropriately, stalking or insults?		
★ Was there direct or indirect reference to race, color, religion, sex, sexual orientation, national origin, marital status, familial status, source of income or disability?		
Was the conduct unwelcome and/or uninvited?		
Was there damage to another person and/or property?		
Was the alleged harasser in a position of power over the target (e.g. age, size, grade, authority)?		
Were there multiple alleged harassers?		
Would the conduct be considered clearly offensive by some groups?		
★ Was the conduct done in an intentionally offensive manner?		
Did the context (tone, body language, etc.) make the conduct more offensive?		
★ Was the conduct a response to a previously filed report?		

<b>PERVASIVENESS</b>	<b>YES</b>	<b>NO</b>
Did the target demonstrate signs of feeling intimidated or fearful?		
Did the conduct affect the target’s or others’ educational benefits, opportunities or performance?		

<b>PERSISTENCE</b>	<b>YES</b>	<b>NO</b>
★ Did the conduct continue despite the target’s or onlookers’ articulation of the desire that the conduct cease?		
★ Had the alleged harasser been instructed about the inappropriateness of the conduct prior to the incident?		
Does the alleged harasser have a history of similar conduct? (Note: the more severe the harassment, the less need to show a series of incidents.)		
Does the target have a history of being harassed/intimidated/bullied?		
Was the incident of significant duration?		

**Documenting incidents**

1. Document the incident on a referral form.
2. Conduct a prompt and complete investigation.
3. Assess the incident using the attached Guide for Assessing Incidents—does it need to be documented as harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence, discrimination or retaliation?
4. Record findings on the referral (or attach).

**If determined TO BE harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence, discrimination or retaliation:**

- Take appropriate action that includes teaching and consequences.
- Document actions taken.
- Decide whether or not the behavior was based on one or more of the characteristics listed in School Board policy JB (see page 9).
- Document the incident and actions in Synergy. For discrimination and for harassment directed at an individual or group of students on the basis of their protected class, use the “Possible Motivation” field to record the basis.

**If determined NOT to be harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence, discrimination or retaliation:**

- Take appropriate action that includes teaching and consequences.
- Document using agreed-upon procedures (Synergy or other tools used in the school).

**If allegation is NOT SUBSTANTIATED in investigation:**

- Document the investigation.
- If further investigation does substantiate the incident, revise the report in Synergy.

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Eugene School District

## **Bullying, harassment & discrimination: Step-by-step complaint process**

1. If you observe or experience an incident of bullying or harassment (including intimidation, cyberbullying, hazing and teen dating violence) or of discrimination, you should contact the school principal or other staff member to report it. Say you would like to report an incident of harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence or discrimination.

If you believe the principal is involved in the incident, you don't have to report to him or her. You may instead contact the district superintendent's office—skip to step 4.

2. Tell the principal or person assigned by the principal or superintendent what happened and answer any questions they have.
3. Work with the principal or person assigned by the principal or superintendent to resolve the issue. This could include talking with a teacher and discussing what may happen with the involved people. The goal of resolving the issue is to 1) protect and comfort the person who feels they've been a target of bullying, harassment or discrimination, 2) assign a consequence if necessary and 3) teach the parties skills that help make school safe and welcoming.
4. If you are unable to resolve the issue by working with the school principal and/or school staff, you may file a formal complaint with the district. There is a single complaint form for use by anyone. It is available from school offices and from the 4J superintendent's office, 200 N. Monroe St. (541-790-7707). Fill out the form completely and return it to the 4J superintendent's office.
5. The superintendent's office will send you a written acknowledgement, postmarked within 10 (ten) working days of receiving the complaint. The acknowledgement will tell you the date the superintendent received the complaint and who has been assigned to handle the complaint.

If the complaint has not yet been addressed at the school level, it will be referred to the principal to follow up (see steps 2–3). (If the principal or supervisor is the subject of the complaint, this step is bypassed.) If you have worked with the school or department but have been unable to resolve the issue, the superintendent will assign a person to follow up on the complaint. This person is the superintendent's designee.

6. As an alternative to a district investigation, the superintendent's designee may offer voluntary mediation as a way of resolving the complaint. If the parties choose voluntary mediation, the timelines provided in this process may be suspended during the course of mediation. Mediation shall take place within a time frame agreed to by the parties. Upon agreement by both parties, mediated resolutions will be put in writing and will be binding upon the parties involved.
7. If mediation or another alternative resolution isn't practical, the superintendent's designee will initiate a district investigation of the complaint. The investigation will include interviews of the complainant and the individual(s) alleged to have acted improperly. The superintendent's office will ensure that parents are informed if their student is involved in the complaint.

The superintendent's designee may assign an individual to investigate the complaint, determine the facts, and recommend possible ways of resolving the complaint. In that case, the superintendent's designee will review the findings and recommendations of the investigator and provide this information to the superintendent. The superintendent will send a written decision to the complainant, postmarked within 20 (twenty) working days of the date the superintendent's office received the complaint.

8. A parent, student, or community member who is not satisfied with how the complaint was resolved by the superintendent may appeal to the school board. If the complainant chooses to file an appeal with the school board, it must be received in the superintendent's office within 10 (ten) working days after the complainant receives a decision from the superintendent.

The school board will determine whether or not to hear the complaint within 10 (ten) working days of receiving the appeal. The school board's decision will be based on the written appeal and the record of the investigation.

The written appeal to the school board shall include the following:

- a. A detailed description of the grounds for the appeal, including the reasons for rejecting the response given by the superintendent.
  - b. Name of the complainant's representative, if any, such as an attorney or advocate.
  - c. The date the formal complaint was filed.
  - d. Copies of any additional supporting documentation that was *not* included in the original complaint.
9. If the school board determines that a hearing is warranted, the school board may refer the matter to the district's hearings officer. If the school board determines that a hearing is not warranted, the school board will notify the complainant and inform him or her of the right to file a complaint directly with the state or federal government.
  10. If the school board refers the complaint to the district's hearings officer, the school board shall forward the appeal and all relevant materials to the hearings officer within 10 (ten) working days of receiving the appeal. The hearings officer will schedule a hearing within 20 (twenty) working days of receiving the appeal. The appeal hearing will be closed to the public. The confidentiality of students, student records, employees and employee records will be maintained to the extent allowed by federal and state law. The decision of the hearings officer will be in writing and will be made part of the record. His or her decision shall be supported by findings of fact and conclusions, and will be binding on all parties. The hearings officer may affirm, modify or reverse the decision made by the superintendent, including providing a different remedy for the complainant and/or directing corrective actions to prevent future recurrence of any bullying, harassment or discrimination.



# Complaint Form

(including incidents of bullying, harassment and discrimination)

Date of complaint: \_\_\_\_\_ Date of incident: \_\_\_\_\_

School or other location where incident occurred: \_\_\_\_\_

Person reporting:  Student  Parent  Volunteer  Employee  Other: \_\_\_\_\_

Name: \_\_\_\_\_ or **Anonymous**   
*(Students, parents and volunteers may anonymously report bullying and harassment of any kind.)*

Phone: home: \_\_\_\_\_ work: \_\_\_\_\_ cell: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_

**Does this complaint involve a report of harassment, intimidation, bullying, cyberbullying, hazing, teen dating violence or discrimination?**

- NO       YES — **Reported offender** (check one):      **Reported victim** (check one):
- |                                  |  |                                  |  |
|----------------------------------|--|----------------------------------|--|
| <input type="checkbox"/> Student | <input type="checkbox"/> Teacher       | <input type="checkbox"/> Student | <input type="checkbox"/> Teacher       |
| <input type="checkbox"/> Parent  | <input type="checkbox"/> Administrator | <input type="checkbox"/> Parent  | <input type="checkbox"/> Administrator |
| <input type="checkbox"/> Other   | <input type="checkbox"/> Other Staff   | <input type="checkbox"/> Other   | <input type="checkbox"/> Other Staff   |

**Have you attempted to resolve the incident/complaint at the school level?**

YES Who did you talk to? \_\_\_\_\_  
What were the results? \_\_\_\_\_  
\_\_\_\_\_

NO Why not? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*The first steps of the Eugene School District’s complaint process are to report the complaint to the school or department and to try to resolve the issue between the complainant and the person whom he or she believes has violated the district’s policies. If you are unable to resolve the issue by working with the school or department, you may file a formal complaint with the superintendent’s office.*

*If the complaint has not yet been addressed at the site level, it will be referred to the school or department, and the administrator or his/her designee will contact you to follow up. (If the principal or supervisor is the subject of the complaint, this step is bypassed.) If you have worked with the school or department but have been unable to resolve the issue, the superintendent will designate a person to follow up on the complaint.*

⇒ CONTINUE TO PAGE 2 ⇒





## **Transgender and Gender Nonconforming Students**

The district believes that all students deserve to be physically and psychologically safe at all times. Students who exhibit behaviors that do not conform to expectations for students of their gender of physical birth are among the most at-risk. Transgender and gender nonconforming youth need active school support and protection for their physical, mental, and educational well-being.

Oregon law and Board policies JB - Harassment, Intimidation, Bullying, Cyberbullying, Hazing and Teen Dating Violence and AC - Nondiscrimination require equal opportunity in education, and prohibit discrimination on the basis of gender identity and expression.

The superintendent is responsible for developing appropriate administrative regulations, procedures or guidelines for implementation of this policy in order to create a safe and inclusive environment for every student; to promote physical and psychological safety of students who exhibit gender nonconforming behavior; and to affirm the right of every student to equal educational opportunity and respectful treatment in their gender of identification and expression.

END OF POLICY

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

[ORS 174.100](#)  
[ORS 332.107](#)

[ORS 339.356](#)  
[ORS 659.850](#)

[OAR 581-021-0045](#)

## Transgender and Gender Nonconforming Students

This administrative rule is intended to clarify existing laws, rules and policies, and to guide how best to support the needs of the district's gender nonconforming students and their families. It does not anticipate every scenario and situation that may occur with respect to gender nonconforming students, and not all gender nonconforming students' needs may be the same. Therefore, it is encouraged that administrators discuss these issues with each gender nonconforming student and family on a case-by-case basis to determine how best to support the student within the parameters of this administrative rule.

### 1. Definitions

- a. "Gender identity" is a person's deeply held sense or psychological knowledge of their own gender, regardless of the sex they were assigned at birth. Everyone has a gender identity.
- b. "Transgender" describes people whose gender identity is different from their gender assigned at birth.
- c. "Gender expression" refers to the way a person expresses gender, such as clothing, hairstyles, activities, or mannerisms.
- d. "Gender nonconforming" or "gender variant" describes people whose gender expression differs from stereotypical expectations, such as "feminine" boys, "masculine" girls, and those who are perceived as androgynous.
- e. "Sex" is the physical makeup of a human being, referred to as their biological or natal sex. A person's biological sex is sometimes also referred to as their "assigned gender."

### 2. Discrimination, Harassment, Intimidation, Bullying and Cyberbullying

Board policies JB - Harassment, Intimidation, Bullying, Cyberbullying, Hazing and Teen Dating Violence and AC - Nondiscrimination prohibit discrimination, harassment, intimidation, bullying and cyberbullying based on a student's gender identity and expression. Complaints alleging discrimination, harassment, intimidation, bullying and cyberbullying based on a person's actual or perceived gender identity or expression are to be handled in the same manner as all other discrimination, harassment, intimidation, bullying and cyberbullying complaints. The guidelines for such complaints are set forth in the district's published guidelines entitled *Bullying, Harassment, & Discrimination: Step-by-Step Complaint Process*.

### 3. Names/Pronouns

As set forth by the Oregon Department of Education's Gender & First Name Change Process for Transgender Students in ODE Systems and the district's *Student Rights & Responsibilities Handbook*, transgender and gender nonconforming students have the right to be addressed and referred to by a name and pronoun that corresponds with the student's gender identity, as determined by the parent and student. District employees may not intentionally refuse to refer to a student by the name or pronoun identified as corresponding with the student's affirmed gender identity.

4. Registration Forms and Student Information System Records

There is a process for handling name and gender changes in the student information system. This process is outlined in the Oregon Department of Education's Gender & First Name Change Process for Transgender Students in ODE Systems. Forms for requesting these changes are available from the district's technology department.

5. Dress Code

Students have the right to dress in accordance with their gender identity, in conformance with the dress and grooming standards contained in the *Student Rights & Responsibilities Handbook* and any dress and grooming standards prescribed by a student's school of attendance.

6. Restroom Accessibility

Students shall have access to a restroom that corresponds to their gender identity. A student shall not be required to use a restroom that is incongruent with the student's gender identity. Where available, a single stall bathroom may be used by any student who desires increased privacy, regardless of the reason. The use of a single stall bathroom shall be a matter of choice for a student, and no student shall be compelled to use such a bathroom. Use of restrooms by transgender or gender nonconforming students shall be determined on a case-by-case basis depending on specific circumstances.

7. Physical Education, Athletics and Activities

Students shall be permitted to participate in gender-separated physical education, intramural athletics, and non-high school interscholastic athletics and activities in accordance with the student's gender identity. Participation in high school interscholastic athletics and sports is governed by the Oregon School Activities Association, which has its own policy with respect to transgender student participation. Activities that may involve the need for accommodations to address student privacy concerns, such as overnight trips, will be addressed on a case-by-case basis using the guiding principles of safety and honoring the student's gender identity and expression.

8. Locker Room Accessibility

A student shall not be required to use a locker room that is incongruent with the student's gender identity. Locker room usage shall be determined on a case-by-case basis, using the guiding principles of safety and honoring the student's gender identity and expression. Some options include:

- a. Use of a private area in the locker room (e.g., a bathroom stall with a door; an area separated by a curtain; a physical education instructor's office in the locker room).
- b. A separate changing schedule (e.g., using the locker room before or after the other students).
- c. Use of a nearby private area (e.g., a nearby restroom; a nurse's office).

## **Administering Medication in School**

School personnel shall not provide any medication to students, except as provided for in this policy. A parent or guardian and a qualified physician must provide written notice before prescribed medicine may be given, except as provided for in School-Based Health Centers below. However, school nurses or their designees, acting under medical directives signed by a physician, may administer specific emergency medication. School personnel who have successfully completed a training course developed by the Oregon Medical Association may administer epinephrine for anaphylactic emergencies.

Students who must depend upon prescribed medication as defined by OAR 581-021-0037 in order to stay in school must have written permission from a parent or guardian requesting that the school district comply with the instructions of the physician. The medication is to be in the original prescription bottle or container, clearly labeled with the name of the student, drug dosage, name of the prescribing physician, and the time interval that the medication is to be taken. The label may serve as the physician's instruction. Parents will provide written permission for their child to receive nonprescription medication as defined in OAR 581-021-0037, except as provided for in this policy. However, any product that contains aspirin requires a physician's order.

School staff shall keep medication that is brought to school by the parent in the original container, appropriately labeled by the pharmacy or physician. Nonprescription medication must be provided to and maintained by the school staff in the original bottle or container unless the student self-administers his or her own medication as specified below. The principal's office shall maintain a list of students receiving medication and document when they have been administered. The principal shall designate the staff members who will assist with the medications. Staff shall store student medications in a locked cabinet. Any consent forms required by this policy will be returned to and maintained in the school office.

Before assisting a student with medication, school personnel shall contact the building principal or school nurse to receive required medication training, review the policies and procedures, and complete the necessary forms.

There are instances when it is advisable for a student to carry and administer his or her own medication.

A student may administer his or her own medication in the following situations unless the school determines that the student does not demonstrate the ability, developmentally and/or behaviorally, to administer medication to him or herself without the assistance of a trained staff member:

- Students in grades K-8 may carry inhalers or any other emergency prescription medication with the written consent of the parent and the school administrator;

- Students in grades K-8 may carry and self-administer one day’s dose of nonprescription medication with the written consent of the parent;
- Students in grades 6-8 may carry and self-administer one day’s dose of noncontrolled prescription medications, including inhalers with the written consent of the parent and school administrator. Controlled prescription medications may not be self-administered;
- Students in grades 9-12 may carry and self-administer one day’s dose of noncontrolled prescription medication (including inhalers) with the written consent of the parent;
- Students in grades 9-12 may carry and self-administer one day’s dose of a controlled medication with the written consent of the parent.

In the event of an emergency that requires treatment with medication, a designated member of the school staff must notify parents or guardian as quickly as possible. The student’s record should contain the current telephone number of the parent specifically for this purpose.

The principal shall notify school personnel each year about the provisions of this policy dealing with medication.

### **School-Based Health Centers**

School nursing staff assigned to a school-based health center may provide medication for students in accordance with clinic rules and statutes and regulations.

END OF POLICY

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Legal Reference(s):

[ORS 109.640](#)

[ORS 339.867](#)

[ORS 339.869](#)

[ORS 339.870](#)

[ORS 433.800 - 433.830](#)

[ORS 475.005 - 475.285](#)

[OAR 581-021-0037](#)

## **AIDS, HIV, and Hepatitis B**

The Board of Directors believes “that every child within district boundaries, whatever his or her ability, school neighborhood, social membership, or any other variable, should have an equal chance to benefit from the best educational program we can provide” (District 4J Philosophy of Education, adopted May 19, 1982). It is the belief of the board that this statement applies to all students including those few who may have AIDS<sup>1</sup>, be HIV<sup>2</sup> positive, or have Hepatitis B.

The Board of Directors takes seriously its responsibility to provide a safe and healthy environment for students, employees, and patrons. All available evidence indicates that there is no established risk of the casual person-to-person transmission of HIV within the school or work setting. Further, because several years may transpire between exposure and positive identification, and because of the laws related to confidentiality, it is unlikely that the school district will know the identity of the majority of those who are infected with the diseases.

It is the intent of the school board that, as a general rule, a student with HIV or Hepatitis B will be allowed to attend school in regular classrooms and that employees with HIV or Hepatitis B will be allowed to continue employment. It is also the intent of the school board to adopt routine procedures for the administration of first aid and the clean up of blood and other body fluids which are designed to further protect against the risk of transmission within the school and work setting.

In adopting this policy, the board has attempted to balance the following interests:

- The rights of an individual who may be infected with the rights of other persons to a safe and healthy environment;
- The rights of an individual to confidentiality with the need of others to have information about who may be infected;
- The fact that the district may know the identity of a few infected students and staff members with the knowledge that the district **will not** know the identity of most infected persons; and
- The public concern about the spread of the disease with established medical knowledge about how the diseases are spread.

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<sup>1</sup>AIDS - Acquired Immune Deficiency Syndrome

<sup>2</sup>HIV - Human Immunodeficiency Virus

### **Volunteers and Independent Contractors**

The district policy shall apply to volunteers and independent contractors who provide direct services to students as if they were employees of the district. All independent contracts for direct services to students shall be presumed to include this specific policy.

### **Standard Precautions**

The district-established procedures shall be used at all times in the administration of first aid and the clean up of blood and other body fluids.

### **Education of Staff**

All school staff members, including custodians, bus drivers and secretaries, should be fully informed of these policies and procedures on an annual basis.

END OF POLICY

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#### Legal Reference(s):

[ORS 433.255](#)

[ORS 433.260](#)

[OAR 333-019-0015](#)

[OAR 437-002-0360](#)

[OAR 437-002-0377](#)

[OAR 581-022-0705](#)

#### Cross Reference(s):

GBEBA - AIDS, HIV and Hepatitis B - Employees

JHCCA/JHCCB - AIDS, HIV and Hepatitis B - Students



# Eugene School District 4J

Code: AC  
Adopted: 4/02/08  
Readopted: 5/06/15

## **Nondiscrimination**

The district shall promote nondiscrimination and an environment free of harassment based on an individual's race, color, religion, sex, sexual orientation<sup>1</sup>, gender identity or expression, national origin, marital status, age or disability, because of the race, color, religion, sex, sexual orientation, national origin, marital status, age or disability of an individual or any other persons with whom the individual associates.

In keeping with requirements of federal and state law, the district strives to remove any vestige of discrimination in employment, assignment and promotion of personnel; in educational opportunities and services offered students; in student assignment to schools and classes; in student discipline; in location and use of facilities; in educational offerings and materials; and in accommodating the public at public meetings.

The Board encourages staff to improve human relations within the schools and to establish channels through which citizens can communicate their concerns to the administration and the Board.

The superintendent shall appoint and make known the individuals to contact on issues concerning the Americans with Disabilities Act (ADA), Section 504 of the Rehabilitation Act of 1973, Title VI, Title VII, Title IX and other civil rights or discrimination issues.<sup>2</sup> The Board will adopt and the district will publish complete procedures providing for prompt and equitable resolution of student and employee complaints.

Federal civil rights laws prohibit discrimination against an individual because he or she has opposed any discriminatory act or practice or because that person has filed a charge, testified, assisted or participated in an investigation, proceeding or hearing. ADA further prohibits anyone from coercing, intimidating, threatening or interfering with an individual for exercising the rights guaranteed under the act.

END OF POLICY

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<sup>1</sup>“Sexual orientation” means an individual’s actual or perceived heterosexuality, homosexuality, bisexuality or gender identity, regardless of whether the individual’s gender identity, appearance, expression or behavior differs from that traditionally associated with the individual’s sex at birth.

<sup>2</sup>Districts are reminded that the district is required to notify students and employees of the name, office address and telephone number of the employee or employees appointed.

**Legal Reference(s):**

<a href="#"><u>ORS 174.100</u></a>	<a href="#"><u>ORS 659A.009</u></a>	<a href="#"><u>ORS 659A.309</u></a>
<a href="#"><u>ORS 192.630</u></a>	<a href="#"><u>ORS 659A.029</u></a>	<a href="#"><u>ORS 659A.321</u></a>
<a href="#"><u>ORS 326.051(1)(e)</u></a>	<a href="#"><u>ORS 659A.030</u></a>	<a href="#"><u>ORS 659A.409</u></a>
<a href="#"><u>ORS 342.934(3)</u></a>	<a href="#"><u>ORS 659A.043</u></a>	
<a href="#"><u>ORS 659.805</u></a>	<a href="#"><u>ORS 659A.103</u></a>	<a href="#"><u>OAR 581-015-0054</u></a>
<a href="#"><u>ORS 659.815</u></a>	<a href="#"><u>ORS 659A.109</u></a>	<a href="#"><u>OAR 581-021-0045</u></a>
<a href="#"><u>ORS 659.850</u></a>	<a href="#"><u>ORS 659A.112 to -659A.139</u></a>	<a href="#"><u>OAR 581-021-0046</u></a>
<a href="#"><u>ORS 659.865</u></a>	<a href="#"><u>ORS 659A.142</u></a>	<a href="#"><u>OAR 581-021-0049</u></a>
<a href="#"><u>ORS 659.870</u></a>	<a href="#"><u>ORS 659A.145</u></a>	<a href="#"><u>OAR 581-022-1140</u></a>
<a href="#"><u>ORS 659A.003</u></a>	<a href="#"><u>ORS 659A.233</u></a>	<a href="#"><u>OAR 839-003-0000</u></a>
<a href="#"><u>ORS 659A.006</u></a>	<a href="#"><u>ORS 659A.236</u></a>	

Age Discrimination Act of 1975, 42 U.S.C. §§ 6101-6107 (2006).  
Age Discrimination in Employment Act of 1967, 29 U.S.C. §§ 621-634 (2006); 29 C.F.R Part 1626 (2006).  
Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213; 29 C.F.R. Part 1630 (2006); 28 C.F.R. Part 35 (2006).  
Equal Pay Act of 1963, 29 U.S.C. § 206(d) (2006).  
Rehabilitation Act of 1973, 29 U.S.C. §§ 503, 791, 793-794 (2006).  
Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2006); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2006).  
Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2006).  
Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2006).  
Wygant v. Jackson Bd. of Educ., 476 U.S. 267 (1989).  
Americans with Disabilities Act Amendments Act of 2008.  
The Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, 38 U.S.C. § 4212.  
Title II of the Genetic Information Nondiscrimination Act of 2008.

**Cross Reference(s):**

GBA - Equal Employment Opportunity and Nondiscrimination  
JB - Harassment, Intimidation, Bullying, Cyberbullying, Hazing and Teen Dating Violence

## Sexual Harassment

It is the policy of Eugene School District 4J that sexual harassment of employees in the work environment is unacceptable and will not be tolerated.

1. Sexual harassment is defined as “unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature.” Sexual harassment may include such actions as: sex-oriented verbal “kidding,” “teasing” or jokes; subtle pressure for sexual activity; physical contact such as patting, pinching or brushing against another’s body; or demands for sexual favors.

Conduct of this type is improper if: (a) submission to the conduct is either an explicit or implicit term or condition of employment; (b) submission to or rejection of the conduct is used as a basis for employment decisions affecting the person involved; or (c) the conduct has the purpose or effect of substantially interfering with an individual’s work performance or creating an intimidating, hostile or offensive working environment.

2. All employees of Eugene School District 4J are expected to avoid any behavior or conduct toward any other employee which could be interpreted as sexual harassment.
3. Appropriate management and supervisory personnel shall take prompt, corrective action when they become aware of sexual harassment. Such action may include discipline up to and including termination of the offending employee or employees. Additionally, the district may report individuals in violation of this policy to law enforcement officials. Licensed staff, staff registered with the Teacher Standards and Practices Commission (TSPC) and those participating in practicum programs, as specified by Oregon Administrative Rules, shall be reported to the TSPC.
4. Any employee of Eugene School District 4J who feels that he or she has been the victim of sexual harassment should follow the district’s complaint process relating to discrimination or notify the director of human resources. The complaint will immediately be investigated to determine whether it is justified. If the complaint is found to have merit, corrective action, as described above, will be implemented. The employee who initiated the complaint shall be notified when the investigation is completed.
5. No reprisal or adverse action will occur as a consequence of initiating a sexual harassment complaint. Federal and state laws and school board policy strictly forbid any form of reprisal or retaliation against a complainant or parties-in-interest in connection with the filing of a complaint of employment discrimination or harassment. Any form of retaliation for the filing of a complaint will be subject to immediate disciplinary action, up to and including dismissal.

The superintendent shall ensure appropriate periodic sexual harassment awareness training or information is provided to all supervisors, staff and students and that annually, the name and position of district officials responsible for accepting and managing sexual harassment complaints, business phone numbers, addresses or other necessary contact information is readily available. This policy as well as the complaint procedure will be made available to all students, parents of students and staff in student/parent and staff handbooks. The district's policy shall be posted in all grade 6 through 12 schools. Such posting shall be by a sign of at least 8 1/2" by 11".

END OF POLICY

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Legal Reference(s):

<a href="#">ORS 243.706</a>	<a href="#">OAR 581-021-0038</a>
<a href="#">ORS 342.700</a>	<a href="#">OAR 584-020-0040</a>
<a href="#">ORS 342.704</a>	<a href="#">OAR 584-020-0041</a>
<a href="#">ORS 342.708</a>	
<a href="#">ORS 342.850</a>	
<a href="#">ORS 342.865</a>	
<a href="#">ORS 659.850</a>	
<a href="#">ORS 659A.006</a>	
<a href="#">ORS 659A.029</a>	
<a href="#">ORS 659A.030</a>	

Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. Section 2000(d).  
Title VII of the Civil Rights Act of 1964, as amended, 42 U.S.C. Section 2000(e).  
Title IX of the Education Amendments of 1972, 20 U.S.C. Sections 1681-1683; 34 CFR Part 106 (2000).  
Davis v. Monroe County Board of Education, 526 U.S. 629 (1999).  
Gebser v. Lago Vista Independent School District, 524 U.S. 274 (1998).

**District Administrative Rules Prohibiting All Forms of Harassment and Discrimination**

can be found at <http://www.4j.lane.edu/adminrules/personnel/>.

**HARASSMENT, DISCRIMINATION, AND  
RETALIATION AGAINST DISTRICT STAFF  
AND STUDENTS ARE STRICTLY  
PROHIBITED BY BOARD POLICY.**

Employees who believe this policy has been violated must report it promptly to their building administrator, the Director of Human Resources or designee (790-7660), or the Superintendent's office (790-7707), Eugene School District Education Center, 200 N. Monroe Street, Eugene OR 97402.

## **District Administrative Rules:**

### **G2100 - Professional Conduct**

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Last Updated: Apr 21 2009 - 10:35am

1. Employees are expected to do their work and conduct themselves competently and professionally at all times when at work or representing the District. Employees must accept responsibility for their own conduct, and show personal and professional integrity at all times. Employees are also expected to conduct themselves off work in a lawful manner, and in a manner that does not bring reproach to the District, or impair their ability to perform as District employees.
2. The District encourages parents and community members of the District to volunteer their time, services and financial support to District schools and programs. Employees should take the time to recognize contributions to the District. Employees may not, however, grant special favors, exceptions, or fail to take appropriate action with a parent or community member because of his or her contributions. District employees are expected to be fair and judicious in the execution of their duties.

### **G2120 - Respectful Workplace**

Last Updated: Apr 21 2009 - 10:35am

The District is committed to workforce diversity and having a positive and professional workplace for all who work here. The District will take all necessary steps to ensure that the work environment remains productive for everyone. It is the responsibility of all employees and agents of the District to treat each other with courtesy, consideration, and respect. The District does not tolerate: (1) any forms of harassment, or offensive or discourteous behavior; (2) demeaning statements, threats, or intimidation; (3) unprofessional and discourteous actions; or (4) any behavior that creates or fosters an unwelcome or abusive work environment.

Employees who feel they have been subjected to disrespectful communication or treatment by other District employees, volunteers, or the public should report it to their supervisor or their administrator.



## **Attendance Expectations**

The District expects reliable and timely attendance by all employees. While there are legitimate reasons for employees to be absent, excessive absenteeism impacts students, safety, and other employees, and impedes the district in accomplishing its mission.

Attendance expectations include:

1. Employees are expected to come to work regularly and as scheduled, missing no more than one day per month worked, on average over the year, except as follows. In measuring unacceptable attendance, the district does not use these leaves: bereavement, state or federal Family Medical Leaves (OFLA/FMLA), jury duty, workers' compensation (on-the-job injury), vacation, military leave, parental and other unpaid leaves provided in collective bargaining agreements.<sup>1</sup>
2. Employees may take district-authorized leaves only. An employee may not take an unpaid day off without the advanced written approval of his or her supervisor and Human Resources director or designee. Failing to return from leave will be treated as job abandonment.
3. Employees will use leave time for the intended purpose of that leave.
4. For each leave type, employees are expected to follow the appropriate procedures for taking the leave. Except for vacation, any absence longer than five work days must be requested and approved by the director of Human Resources or designee.
5. Employees will accurately report their absences.

Not meeting these expectations will subject the employee to disciplinary or other corrective personnel action, up to and including termination. Nothing in this policy is intended to waive the just cause provisions in any collective bargaining agreement.

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<sup>1</sup> Teacher released days provided by contract (i.e. elementary leadership days, ESS IEP release days, etc.) are also not included in determining excessive absences.



# Eugene School District 4J

Code: **GBCBA**

Adopted: 7/43, 9/5/90, 2/1/95

Revised: 2/1/95, 12/11/02, 12/21/05

Orig. Code(s): 2440.1, 2440.3-4, 2440.5-8,  
2440.2, 2440.9

## **Drug, Tobacco, and Alcohol Abuse by Employees**

### **Philosophy**

The board believes that all students have the right to learn in an atmosphere that is conducive to their success. The abuse of drugs, tobacco and alcohol by employees will have a deleterious effect on the ability of the student to learn and on the ability of the staff to provide a meaningful educational program. The district intends to provide a safe work environment and encourage personal health. Therefore, this district considers the use or abuse of drugs, tobacco, or alcohol on the job by employees to be an unsafe and detrimental work practice.

With respect to the use and abuse of chemicals, all district employees are responsible to act as role models for students, and shall, as a condition of employment, abide by the provisions of this policy.

### **Prohibited Conduct**

1. The possession, use, or distribution of illicit drugs and alcohol on school premises or as a part of any of the district's activities is prohibited.
2. Any employee who admits to the use of alcohol or illegal drugs while at work or just prior to work or is observed using alcohol or illegal drugs while at work or just prior to the workday or who possesses, sells, trades, or offers for sale illegal drugs in the workplace during working hours, may be subject to disciplinary action up to and including dismissal and referral for prosecution.
  - a. "Drugs" shall include any narcotic drug, hallucinogenic drug, amphetamine, barbiturate, marijuana, or any other controlled substance. Alcohol shall include any form of alcohol for consumption, including beer, wine, wine coolers, or liquor.
  - b. "Workplace" shall mean the site for the performance of work done for the district. This includes any district building or any district-approved vehicle (including the employee's own vehicle) used to transport students or fellow employees to and from school or school activities or to transport fellow workers to and from different work sites; off-school property during any district sponsored or district-approved activity, event or function, such as field trip or athletic event, where students are under the jurisdiction of the district.
3. No staff member is permitted to smoke, inhale, dip or chew or sell tobacco at any time, including non-school hours in any building facility, or vehicle owned, leased, rented, or chartered by the school district, school, or public charter school; or an school grounds, athletic grounds, or parking lots, for the purposes of this policy "tobacco" is defined to include any lighted or unlighted cigarette, cigar, pipe, bidi, clove cigarette, and any other smoking products, and spit tobacco, also known as smokeless, dip, chew, and snuff, in any form. Staff violations of this policy will lead to disciplinary

action up to and including dismissal. The superintendent will develop a plan for implementation of this policy.

### **Prescription Medication**

Any employee who is under the treatment of a physician and who must bring prescription medicines to the workplace shall carry the medicines in the original container bearing the name of the drug, the name of the physician, and the prescribed dosage.

### **Notice Regarding Violation of Criminal Drug Statutes<sup>1</sup>**

Any employee who is convicted of any violation of criminal drug statutes occurring in the workplace is required to notify the director of human resources no later than five (5) days after the conviction.

### **Reporting the Use or Presence of Tobacco, Drugs or Alcohol**

Any employee who is aware of the use of tobacco, drugs or alcohol by employees or the presence of controlled substances on district property, in district vehicles, or at school-sponsored activities is encouraged to bring such information to the attention of his or her immediate supervisor or the director of human resources.

### **Employee Counseling**

It is the responsibility of the employee's supervisor to counsel with an employee and/or to refer the employee to the human resources department for appropriate counseling whenever changes in performance are observed that suggest an employee may have a problem with drugs or alcohol. The supervisor or the human resources department may suggest that the employee voluntarily seek help.

### **Awareness**

The administration will make copies of this policy available to each employee annually and will periodically provide information about the dangers of tobacco, drug, and alcohol abuse in and outside of the workplace.

### **Procedures**

The procedures for implementing this policy will be established by administrative rule and shall include a biennial review of the district's program. This policy does not provide for drug testing of employees. Any policy establishing a districtwide employee drug testing program will require prior approval by the board and will not include random testing of employees unless the district has reasonable suspicion that an employee's use or abuse of alcohol or illegal drugs is in violation of this policy.

## Drug and Alcohol Testing for Commercially Licensed Drivers

In a continuing effort to prevent accidents and injuries that might result from the misuse of drugs and alcohol by district drivers who are required to hold commercial licenses, the superintendent will establish and maintain administrative rules that comply with the requirements of the federal Omnibus Transportation Employee Testing Act of 1991 and Federal Motor Carrier Safety Administration rules.

END OF POLICY

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### Legal Reference(s):

[ORS Chapter 475](#)  
[ORS 657.176](#)  
[ORS 659.840](#)  
[ORS 659A.300](#)

[OAR 581-053-0015](#)  
[OAR 581-053-0545](#) (4)(c)(R,S,T)  
[OAR 581-053-0550](#) (5)(t,u,v)

[OAR 584-020-0040](#)  
[OAR 839-006-0200](#) to -0265

Controlled Substances Act, 21 U.S.C. Section 812, schedules I through V, 21 CFR 1308.11-1308.15 (2000).  
Americans with Disabilities Act of 1990, 42 U.S.C., Sections 12101-12213; 29 CFR Part 1630 (2000); 28 CFR Part 35 (2000).

## **G2430 - Substance Abuse**

Last Updated: Apr 21 2009 - 11:04am

The District recognizes that the use of drugs and alcohol, whether on or off the job, which adversely affects job performance, may constitute a serious threat to the health and safety of students, the public, and employees and impact effective instruction and the efficient delivery of District services. (See Board Policy GBCBA) The primary goal of this policy is to achieve a work place free of the impairments of drugs and alcohol, and to be in compliance with OR-OSHA regulation 437-001-0760(4), which prohibits anyone whose ability to work safely has been impaired by alcohol, drugs, or medication from working in that condition.

In any instance where an employee's impaired job performance or conduct provides reasonable suspicion of drug or alcohol use, the District may require appropriate testing. Testing procedures and the validity of the results will be measured by the prevailing practice in the medical field. In all situations where testing is called for, due consideration will be given to the legal rights and privacy of the tested employees.

Employees who are concerned about their use of alcohol or drugs are urged to seek confidential assistance from the Employee Assistance Program (EAP). Employees may also contact the Human Resources Department for assistance and can be assured that the contact will remain confidential to the extent legally possible. For employees who seek assistance in advance of detection, the District will provide reasonable accommodation as necessary and practical to allow treatment to take place.

The legal use of prescribed drugs or over-the-counter medications is permitted on the job, unless the use of the drug(s) may limit or impair the employee's ability to perform employment related duties safely and efficiently. It is the employee's responsibility to ascertain whether the use of a medication will limit or impair them.

Citings

Board Policy

Drug, Tobacco, and Alcohol Abuse by Employees - GBCBA

State Law

OR-OSHA regulation 437-001-0760(4)

### **G2430.01 - Definitions**

Last Updated: Apr 21 2009 - 11:04am

For purposes of this document, the following definitions apply:

1. Alcohol - The intoxicating agent in beverage alcohol, ethyl alcohol, or other low molecular weight alcohols including methyl and isopropyl alcohol.
2. Drugs - Any intoxicants or controlled substances as defined by the criminal code of the State of Oregon, or substances lawfully prescribed for the employee's use and over-the-counter medications, which could have an adverse impact on their ability to perform their job duties in a safe manner. The definition of drugs excludes alcohol.
3. Drug or Alcohol Test - The compulsory submission of urine, breath, or blood by an employee in accordance with established collection and testing procedures to detect drug and/or alcohol use.
4. Reasonable Suspicion - Specific observations concerning the appearance, conduct, speech, odor on the breath or body odors of an employee that would cause one to suspect that the employee is under the influence of alcohol or drugs.
5. Under the Influence of Alcohol - An individual is considered to be "under the influence of alcohol" when the individual's blood alcohol content exceeds .02%.
6. Under the Influence of Drugs - An individual is considered to be "under the influence of drugs" when a detectable amount of a drug is found in the individual's body that may

impair the individual's ability to safely and efficiently perform job duties and responsibilities.

7. Work place: Any location where an employee is performing District job duties or is representing the District in an official capacity whether or not the employee is compensated. The exclusion of alcohol from the work place does not pertain to those sites at which, in the judgment of the Superintendent, the use of alcohol cannot be avoided, such as during business meetings with members of foreign delegations where refusal of a traditional "toast" would show disrespect for the customs or culture of the delegate.

## **G2430.02 - Prohibited Conduct**

Last Updated: Apr 21 2009 - 11:05am

This section does not attempt to address all possible issues that may arise around the use of alcohol and drugs. Each individual employee and each supervisor is responsible for using his or her best judgment and acting in a reasonable and responsible manner when faced with a situation that is not explicitly covered in the policy, such as situations that may arise outside the usual work place or when an employee may be called back to work outside of their regularly scheduled hours.

Violations may result in discipline up to and including discharge.

The following conduct is prohibited in the work place, on school premises, while working, and at a District activity:

1. The unlawful buying, selling, transportation, possession, providing or use of drugs;
2. The use of alcohol;
3. Being under the influence of alcohol;
4. Being under the influence of drugs;
5. Having a detectable odor of alcohol on the breath;
6. Operating a District owned or leased vehicle or one rented with District funds at any time proximate to consuming intoxicants or a private vehicle if using the vehicle in the course of conducting District business or when going to, or coming from, District business, either in town or while attending training or other business out of town;
7. Failure to report limitations or impairment caused by prescribed medications or over-the-counter drugs.

## **G2430.03 - Consequences of Positive Test Results**

Last Updated: Apr 21 2009 - 11:06am

An employee who has tested positive for drugs or alcohol as defined by this policy may be referred to the Employee Assistance Program or drug and/or alcohol counseling. An employee's participation in the Employee Assistance Program or in drug or alcohol counseling will be considered in determining what, if any, disciplinary action may be taken.

If an employee is not terminated for violations of this policy, the employee who has tested positive for drugs or alcohol will be required to sign a performance agreement. Provisions for unannounced testing for a specified period following the positive test may be included in the agreement. If the employee violates the terms of the agreement or again tests positive during such a period, he or she may be subject to immediate dismissal.

## **G2430.04 - Interference With Policy**

Last Updated: Apr 21 2009 - 11:07am

Any activity which purposely interferes with the District's policy on the use of drugs and alcohol will be grounds for disciplinary action which may include discharge. Examples include, but are not limited to, the following: tainting, tampering, or substitution of blood or urine samples; falsifying information regarding the use of prescribed medications or controlled substances; failure to cooperate with any tests outlined in this policy to determine the presence of drugs or alcohol; or failure to consent to or cooperate with any administrative search.

## **G2430.05 - Employee Rights**

Last Updated: Apr 21 2009 - 11:07am

Any employee who has tested positive shall be given access to all written documentation available from the testing laboratory, which verifies the accuracy of the testing equipment used in the testing process, the chain of custody of the specimen, and the accuracy rate of the laboratory. The employee will be provided with a copy of the results. All documentation on the testing will be sealed and maintained in a secured file in Human Resources. All test results will be kept confidential by the District.

# Eugene School District 4J

Code: **GBK**  
Adopted: 6/19/96  
Revised/Readopted: 12/21/05; 11/06/13  
Orig. Code(s): 2800

## Use of Tobacco Products

The Board recognizes its responsibility to promote the health, welfare and safety of students, staff and others on school district property and at school-sponsored activities. In light of the scientific evidence that the use of tobacco is hazardous to health and to be consistent with district curriculum and Oregon law, it is the intent of the Board to establish a tobacco-free environment.

No student, staff member, or school visitor is permitted to smoke, inhale, dip, or chew, or sell tobacco at any time, including non-school hours:

1. In any district building, facility, or vehicle owned, leased, rented, or chartered by the school district, or school or public charter school, or
2. On school grounds, athletic grounds, or parking lots or other property used by the district.

For the purpose of this policy, “tobacco” is defined to include any lighted or unlighted cigarette, cigar, pipe, bidi, clove cigarette, and any other smoking products; smokeless tobacco, also known as spit tobacco, dip, chew, snus, and snuff, in any form; and nicotine or nicotine delivering devices, chemicals or devices that produce the physical effect of nicotine substances or any other tobacco substitute (e.g., e-cigarettes). This does not include FDA-approved nicotine replacement therapy products used for the purpose of cessation.

The school district shall establish policies and procedures for enforcing this policy with students, employees, and visitors. The school district shall notify students, families, educational personnel, and school visitors of the tobacco-free policy and procedures in handbooks and newsletters, on posted notices or signs, and by other efficient means.

END OF POLICY

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### Legal Reference(s):

[ORS 243.650](#)  
[ORS 433.845](#)  
[ORS 433.850](#)

[OAR 581-053-0015](#)  
[OAR 581-053-0545 \(5\)\(c\)®](#)  
[OAR 581-053-0550 \(5\)\(t\)](#)

Junction City Police Assn. v. Junction City, Case No. UP-94-88 and UP-124-88, 11 PECBR 732 (1989).  
Tualatin Valley Bargaining Council v. Tigard School District 23J, Case No. UP-120-87, 11 PECBR 42 (1988); adhered to on reconsideration, 11 PECBR 53 (1988).  
Pro-Children Act of 1994, 20 U.S.C. Sections 6081-6084.

# Eugene School District 4J

Code: **JFCG**  
Adopted: 6/16/75  
Revise: 9/25/91, 12/21/05; 11/06/13  
Orig. Code(s): 5630

## Use of Tobacco by Students

No student is permitted to possess tobacco products in any building, facility, or vehicle, owned, leased, rented, or chartered by the school district, school, or public charter school, or on district grounds, athletic grounds, or parking lots.

For the purpose of this policy “tobacco” is defined to include any lighted or unlighted cigarette, cigar, pipe, bidi, clove cigarette, and any other smoking products; and smokeless tobacco, also known as spit tobacco, dip, chew, snus and snuff, in any form; and nicotine or nicotine delivering devices, chemicals or devices that produce the physical effect of nicotine substances or any other tobacco substitute (e.g., e-cigarettes). This does not include FDA-approved nicotine replacement therapy products used for the purpose of cessation.

This policy will be implemented by reasonable efforts to monitor use and possession of tobacco products, including, but not limited to, action to cause violators to cease and desist when a violation takes place within the plain view of a school employee. When there is a reasonable suspicion that a student is possessing tobacco products in violation of this policy and state law, a school administrator or designee may follow the procedures for search and seizure outlined in the *Student Rights and Responsibilities Handbook*.

END OF POLICY

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### Legal Reference(s):

[ORS 163.575](#) (1)(d),(e)  
[ORS 332.107](#)  
[ORS 336.222](#)  
[ORS 336.227](#)  
[ORS 339.240](#)  
[ORS 339.250](#)

[ORS 339.865](#)  
[ORS 431.840](#)  
[ORS 431.845](#)  
[ORS 433.835](#) - 433.990

[OAR 581-021-0050](#) to -0075  
[OAR 581-022-0413](#)  
[OAR 581-053-0015](#)  
[OAR 581-053-0545](#) (4)(c)(R,S,T)  
[OAR 581-053-0550](#) (5)(t,u,v)

Pro-Children Act of 1994, 20 U.S.C. Sections 6081-6084.



# Eugene School District 4J

Code: **JFCH/JFCI**  
Adopted: 11/16/86  
Revised: 8/15/90, 6/19/96,  
12/21/05  
Orig. Code(s): 5215

## **Drug, Tobacco and Alcohol Abuse by Students**

The Board believes that all students have the right to learn in an atmosphere that is conducive to their success. The use and abuse of chemicals by students have a deleterious effect on the ability of the student to learn and on the ability of the staff to provide a meaningful educational program; the harmful use of chemicals is not a normal stage of adolescence.

A student shall not knowingly possess, use, transmit, traffic in, or be under the influence of such substances as amphetamines, barbiturates, marijuana, narcotic or hallucinogenic drugs, alcohol, or intoxicants of any kind on the school grounds, or off the school grounds while attending a school activity, function or event.<sup>1</sup> No student is permitted to possess a tobacco product in any building, facility, or vehicle owned, leased, rented, or chartered by the school district, school, or public charter school; or on school grounds, athletic grounds, or parking lots. For the purpose of this rule “tobacco” is defined to include any lighted or unlighted cigarette, cigar, pipe, bidi, clove cigarette, and any other smoking product, and spit tobacco, also known as smokeless, dip, chew, and snuff, in any form. If a student violates this rule, the administration will follow the disciplinary procedures established in the *Student Rights and Responsibilities Handbook* and will notify the parents. If there has been a violation of the law, the appropriate law enforcement agencies will be notified following the procedures as specified in board policy KN - Cooperation With Law Enforcement Agencies. Discipline may include the completion of an appropriate rehabilitation program.

A responsibility of the school district is to attempt to maintain a drug-free school environment so that learning can take place; to educate all students so that they are aware of the issues and problems related to the use of tobacco, drugs and substances; to identify students who have chemical abuse problems and to assist them in seeking and obtaining appropriate treatment services, whether within the school or in the community if such services are beyond the scope of the school; and to work with other community agencies in solving the problems related to substance abuse.

Therefore, the district will maintain an age-appropriate, developmentally-based drug, tobacco, and alcohol prevention curriculum that will address the legal, social, and health consequences of drug, tobacco, and alcohol use and provide information about effective techniques for resisting peer pressure to use drugs, tobacco, and alcohol. The district will also develop and maintain a system of identification and referral; provide information about smoking cessation; provide information about drug and alcohol counseling and rehabilitation, and re-entry programs that are available to students; keep the community aware of the problems in the district and the approaches being used by the district for combating substance abuse; and establish working relationships with community groups to help address the issues of chemical abuse.

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<sup>1</sup> See Board Policy JHCD - Administering Medication in School for the legitimate use of medication at school.

The school administration shall continually review its drug, tobacco, and alcohol abuse program to determine its effectiveness and any necessary changes in the program and to ensure that its disciplinary procedures are consistently enforced.

END OF POLICY

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**Legal Reference(s):**

<a href="#">ORS 161.605</a>	<a href="#">OAR 584-020-0040</a>
<a href="#">ORS 161.625</a>	<a href="#">OAR 581-021-0050 to -0075</a>
<a href="#">ORS 332.107</a>	<a href="#">OAR 581-022-0413</a>
<a href="#">ORS 336.067</a>	<a href="#">OAR 581-053-0015</a>
<a href="#">ORS 336.222</a>	<a href="#">OAR 581-053-0545 (4)(c)(R,S,T)</a>
<a href="#">ORS 336.227</a>	<a href="#">OAR 581-053-0550 (5)(t,u,v)</a>
<a href="#">ORS 339.240</a>	
<a href="#">ORS 339.250</a>	
<a href="#">ORS Chapter 475</a>	

Controlled Substances Act, 21 U.S.C. Section 812, schedules I through V; 21 CFR 1308.11-1308.15 (2000).



## Technology Appropriate Use Guidelines

### Eugene School District 4J

### **Purpose of Technology Appropriate Use Guidelines**

District owned technology is to be used to enhance learning and teaching as well as improve the operation of the district. Technology, as referred to in these guidelines, is any electronic device that is used by students or staff.

The Eugene 4J School District's electronic communications network, 4JNet, is to be used to support and enhance learning and teaching that prepares students for success as well as support and improve operations of the District. Providing access to 4JNet is an investment in the future of both our students and staff. 4JNet supports the core beliefs of the Eugene 4J School District:

- Do what's best for students.
- Continue to learn and grow.
- Respect and care about each other.

The Eugene School District believes that electronic communication is a tool for life-long learning, and that access to 4JNet is one of the resources that promote educational and organizational excellence. We believe the responsible use of 4JNet and 21<sup>st</sup> Century equipment will propel today's students into their future college or career choices. These tools and resources will allow students and staff to significantly expand their knowledge by accessing information resources as well as analyzing, synthesizing, and publishing information.

Students and staff are expected to use 4JNet in a responsible, efficient, ethical, and legal manner in accordance with the mission of the Eugene School District 4J. The use of 4JNet may be revoked at any time for inappropriate behavior. Users assume responsibility for understanding relevant board policy and these guidelines as a condition of using 4JNet. Staff members are accountable to teach and use 4JNet responsibly. Use of 4JNet that is inconsistent with policy and guidelines may result in loss of access as well as other disciplinary or legal action.

The purpose of this document is to provide guidance to students and staff in the use of technology in order to maximize the derived benefits, provide safety in the use of technology, and insure the security of confidential information.

### **Related Laws and Board Policies**

#### **Federal Laws**

[CIPA](#) - The Children's Internet Protection Act is a federal law enacted by Congress in December 2000 to address concerns about access to offensive content over the Internet on school and library computers.

What CIPA requires: Schools and libraries subject to CIPA may not receive the discounts offered by the E-Rate program unless they certify that they have an Internet safety policy and technology protection measures in place. An Internet safety policy must include technology protection measures to

block or filter Internet access to pictures that: (a) are obscene, (b) are child pornography, or (c) are harmful to minors, on technologies that access the Internet by minors.

Schools subject to CIPA are required to adopt and enforce a policy to monitor online activities of minors; and Schools and libraries subject to CIPA are required to adopt and implement a policy addressing: (a) access by minors to inappropriate matter on the Internet; (b) the safety and security of minors when using electronic mail, chat rooms, and other forms of direct electronic communications; (c) unauthorized access, including so-called “hacking,” and other unlawful activities by minors online; (d) unauthorized disclosure, use, and dissemination of personal information regarding minors; and (e) restricting minors’ access to materials deemed harmful to them.

Schools and libraries are required to certify that they have their safety policies and technology protection in place before receiving E-Rate funding.

CIPA does not affect E-Rate funding for schools and libraries receiving discounts only for telecommunications, such as telephone service.

An authorized person may disable the blocking or filtering measure during any use by an adult to enable access for bona fide research or other lawful purposes.

CIPA does not require the tracking of Internet use by minors or adults.

[COPPA](#) - Children's Online Privacy Protection Act (COPPA) – A Federal; law passed by the U.S. Congress in 1998 to specifically protect the privacy of children under the age of 13 by requesting parental consent for the collection or use of any personal information of Web site users.

[FERPA](#) – Family Educational Rights and Privacy Act - A Federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education. FERPA gives parents certain rights with respect to their children's education records and specifies how districts should handle requests for student information.

[HIPAA](#) – Health Insurance Portability and Accountability Act of 1996 – A federal law to establish national standards for electronic health care transactions and national identifiers for providers, health plans, and employers. It also addressed the security and privacy of health data.

## **State Laws**

[ORS 244.040](#) — Prohibited use of official position or office; exceptions; other prohibited actions

[ORS 260.432 Campaign Finance](#) — The restrictions imposed by the law of the State of Oregon on your political activities are that “No public employee shall solicit any money, influence, service or other thing of value or otherwise promote or oppose any political committee or promote or oppose the nomination or election of a candidate, the gathering of signatures on an initiative, referendum or recall petition, the adoption of a measure or the recall of a public office holder while on the job during working hours. However, this section does not restrict the right of a public employee to express personal political views.”

## **Eugene SD 4J Board Policies**

[Board Policy KGF](#) — Use of District Property – This policy defines 4J property including equipment, computer software, and networks, and their use by district staff and volunteers.

[Board Policy JFCFA/GBNAA](#) – Cyberbullying – “Cyberbullying” is the use of any electronic communication device to convey a message in any form (text, image, audio, or video) that violates Board Policy JB-Intimidation, Bullying, Harassment, Discrimination, Hazing, and Retaliation or which disrupts or prevents a safe and positive educational or working environment, or places a person in reasonable fear of physical harm or damage to their property. Any form of cyberbullying, by students or staff is prohibited and will not be tolerated in the Eugene School District 4J.

[Board Policy JB](#) —Intimidation, Bullying, Harassment, Discrimination, Hazing, and Retaliation. This policy defines each of the terms in the title and the consequences to students perpetrating such activity.

**Definitions**

<b>4JNet</b>	Eugene School District 4J’s electronic communications network connects all school sites together with Internet access.
<b>District 4J email</b>	Student and staff email accounts provided by the district. (Zimbra)
<b>Filtering</b>	A process to deny access to certain websites or resources as defined in the filter.
<b>Internet</b>	A worldwide network that connects smaller networks together.
<b>Social Networking</b>	Websites that provide means of personal communications between participants (i.e. FaceBook, MySpace)
<b>iPortal (Moodle)</b>	An open source course management system available to teachers, staff, and students.
<b>Wiki</b>	“A website that allows the easy collaborative creation and editing of any number of interlinked web pages via a web browser using a simplified markup language or a WYSIWYG text editor.” – Wikipedia definition <a href="http://en.wikipedia.org/wiki/Wiki-cite_note-0">http://en.wikipedia.org/wiki/Wiki-cite_note-0</a>
<b>Blog</b>	Blend of the terms web and log. It is considered a type of website. Blogs are usually maintained by an individual with regular entries of commentary, descriptions of events, or other material such as graphics or video.
<b>Netiquette</b>	Socially acceptable rules of etiquette that apply when communicating over the Internet, social networks, or devices.

## Student Safety and Privacy Guidelines

### General Guidelines

The Eugene School District 4J has an obligation to protect student safety and to balance this with the need for open communications when using the Internet. There are documented instances of students being inappropriately identified via the Internet and thereby becoming subjected to unhealthy situations or unwelcome communications.

The purposes of these guidelines are:

- To inform school staff of the possible dangers of allowing students to publish identifying information on the Internet.
- To recognize that there are potential advantages of allowing students to publish identifying information on the Internet.
- To provide to schools a recommended set of Guidelines governing how student-identifying information should be allowed in publishing on the Internet.

Staff and student users of 4JNet must be aware that information accessed, created, sent, received, or stored on the network is not private. It is subject to review by network system administrators, lawyers, and others who may investigate complaints regarding inappropriate or illegal material.

### **ALL K-12 Students**

It is clear that there are significant risks, as well as significant advantages, involved with allowing students to be identified on the Internet. Therefore students should not be easily identifiable from materials they might publish on the Internet. No directory information should be posted on the web for students whose parents have returned the form asking that such information not be released.

### **Student Internet Publishing Guidelines**

- Only first names should be used in published student work.
- Pictures that are a part of student publishing should not include identifying information.
- Under no circumstances should a student's home address or phone number be included.
- If replies to published student work are appropriate, the sponsoring teacher's address should be the email address displayed, not the student's.
- In special circumstances with parent-signed release, identifying information can be added.
- No social sites are to be accessed using District provided student email accounts.

## **Additional High School Guidelines Interactive**

### **Interactive Online Forms and Applications**

There are circumstances where it may be appropriate for older students (Grades 9-12) to provide identifying information along with work published on the Internet. The 4J Internet Guidelines Committee recognizes that high school student publications on the Internet may allow more identifying information where it is considered appropriate by the student, parent, and the supervising staff member. One example might be college entrance or employment opportunities that would be enhanced by viewing a student's work on the Internet. To make this determination the submitting high school student and the supervising staff member must carefully weigh the potential for risk against the perceived advantage of providing this identifying information. Students are required to seek guidance and approval from parents and school staff before providing identifying information. It is imperative that the site the students are communicating personal information to is a secure site – https.

### **Online Safety Resources**

The websites below provide safety information for adults and children.

<http://www.csriu.org/>- Center for Safe and Responsible Internet Use

<http://www.safekids.com/>- General Resource Site

<http://www.getnetwise.org/>- Internet Education Foundation

<http://www.wiredsafety.org/>- Wired Safety

<http://www.missingkids.com/>- National Center for Missing and Exploited Children

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## **Use of District-Owned Technology Devices**

### **General Guidelines**

The purpose of District-owned technology resources is to enhance the educational experience of students and to increase the operational efficiency and teaching of staff. Practices that attempt to achieve this purpose in a safe, legal manner are acceptable while practices that do not attempt to achieve this purpose are considered not acceptable.

Teachers, specialists, and other supervising adults will teach and discuss the appropriate use of 4JNet, technical resources, and the Internet with their students, monitor their use, and intervene if the resource is not being used appropriately. The District will provide training resources for staff and students to use in their buildings.

Internet users are encouraged to find resources, such as email, blogs, wikis, and websites, that meet their individual needs and take advantage of the networks many useful functions. There are many applications that can be used in an educationally beneficial manner as well as applications that can be used in an inappropriate, illegal, or unacceptable manner. Therefore, the District has established an adaptive baseline of filtered websites across all K-12 schools and a bypass list is maintained for students in grades K-2. Additionally, individual school staffs in conjunction with their Technology Leadership Team (TLT) may choose to filter additional sites beyond the District minimums.

Although the District has deployed an Internet filtering system and students are supervised when they use the Internet, this does not guarantee that students will not access inappropriate materials or sites that parents consider objectionable. District 4J's guidelines for accessing the Internet prohibit access to material that is inappropriate in the school environment. Students should report inappropriate access of material to a teacher, other staff person, or their parents. Parents are encouraged to discuss responsible use of the Internet with their children at home and how this responsibility extends to using the Internet appropriately at school.

District equipment that is used off site is subject to the same rules as when used on site. However, users should be aware that 4JNet filter does not work outside of the district network.

### **Unacceptable Use of 4JNet and Equipment**

The [Student Rights and Responsibilities Handbook](#) governs student discipline. [School Board Policy and District Administrative Rules](#) govern staff use.

The unacceptable uses of 4JNet may result in suspension or revocation of network privileges. Unacceptable use is defined to include, but not be limited to, the following:

- Violation of School Board Policy (KGF - Use of District Property; JB - Discrimination, Harassment, Intimidation, Bullying, and Retaliation; and JFCFA/GBNAA - Cyberbullying),

District Administrative Rules, or any provision in the district Student Rights and Responsibilities Handbook.

- Transmission of any material in violation of any local, state, or federal law. This includes, but is not limited to: copyrighted materials, threatening or obscene material, or material protected by trade secret.
- The use of profanity, obscenity, or other language that may be offensive to another user.
- Any form of vandalism, including but not limited to: damaging hardware, computer systems, or networks, and/or disrupting the operation of the network.
- Copying and/or downloading commercial software or other material e.g. music, in violation of federal copyright laws.
- Use of the network for financial gain, commercial activity, or illegal activity, e.g. hacking.
- Use of the network for political activity.
- Use of the network to access pornographic or obscene material.
- Creating and/or placing a computer virus on the network.
- Accessing another person's individual account. Passwords should never be shared with another person and should be changed frequently. Passwords should not be common words or names that can be found in a dictionary.
- Posting information or images that could be a form of harassment or could promote a negative culture in the school environment by causing a student or staff member to feel uncomfortable or unsafe at school (See [Cyberbullying Board Policy](#))
- Activity with a malicious intent to disrupt the network
- Installation of unapproved equipment e.g. wireless access points, routers, switches, network cabling not provided or approved by the Computing and Information Services Department; unapproved or unlicensed software; or changing of district settings is prohibited. The potential for “hackers” into our network is breached by any of these activities.
- Bypassing of District specified filtered Internet websites on computers used by students.

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## **Use of Personal Technology Devices at School**

### **Staff Guidelines**

Personal staff equipment brought to school for instructional purpose use will follow the guidelines of the Collective Bargaining Agreement articles 7.2 and 7.3.

7.2 The District shall reimburse unit members for the reasonable cost of personal property with a value of \$500 or less that is stolen or damaged if related to their instructional responsibilities or is stolen or damaged as a result of the District’s negligence. The District shall reimburse unit members for the reasonable cost of personal property with a value greater than \$500 that is stolen or damaged and is properly documented as stolen or damaged as a result of the District’s negligence.

7.3 DISTRICT EQUIPMENT: Unit members will not be held liable for loss, damage or theft of District equipment provided reasonable care has been taken.



## **Acceptable Use of Personal Technology**

Personal devices, such as cell phones, smart phones, tablets, digital cameras, MP3 players, and laptops may be used for instructional purposes in the classroom at the discretion of the teacher. The same personal devices may be used outside of the classroom at the discretion of the school. However use of 4JNet resources, such as email, chat, wikis, blogs, and Internet websites must be done in a responsible and respectful manner. ([Student Rights and Responsibilities Handbook](#))

## **Unacceptable Use of Personal Devices**

Students and staff are encouraged to use district equipment whenever possible. Unacceptable use of personal technology devices by students may result in suspension or revocation of personal device privileges. These include, but are not limited to:

- Use of a personal device that violates any of the unacceptable uses for District-owned technology listed above.
- Use of a personal device to gain or give an advantage in a testing situation.
- Use of personal devices during class that are not approved by the school or the individual teacher (e.g. cell phones, smart phones, tablets, digital cameras, MP3 players, and laptops).
- Downloading and installing District licensed software on personal devices unless specifically allowed by the licensing agreement.

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## **Network Communication Guidelines**

### **General Guidelines and Netiquette**

Users of email, chat, blogs, wikis, and other network services should understand that everything that they post is public for all to see. Email messages are not private. Once it is posted it can never truly be removed from the Internet. District technical staff has access to all mail in order to maintain the system. All email is archived for a period of three years, and is subject to public records requests. All FERPA, HIPAA, CIPA, and COPPA protections would still apply to email before being disclosed. Users should be aware of the common netiquette that users expect from one another:

- When sending email, make your "subject" as descriptive as possible.
- Check your email frequently and handle it appropriately after reading it, i.e. file, delete.
- Be very careful who your message is addressed to and how you reply. Do not "Reply All" unless you really want everyone on the original message to see your reply.
- Use BCC (Blind Carbon Copy) instead of CC when sending to a large number of email addresses, such as parents, and include sending to yourself. In doing so, the recipients will not see the emails re[plies of all others that are being copied nor will they need to scroll through a long list of email addresses on a small mobile/handheld device.
- Both incoming and outgoing email is filtered for spam and is blocked or quarantined based on the source and content of the email. Not all spam will be caught by any filtering system.
- Do not post the personal addresses or phone numbers of students or colleagues.
- Proofread and edit messages before they are sent, but be tolerant of errors in messages from others.

- Be careful when using sarcasm and humor: without face-to-face communications, a joke may not be taken the way it was intended.
- All communication should be respectful and professional.
- Protect the privacy of other people.
- Messages written in ALL CAPITALS are difficult to read and are the network equivalent of shouting.
- Manage the email resources that you are allocated in order to stay within the set data space quotas.

## **Staff 4J Email Accounts**

All 4J staff members are issued an email account. Guest teachers, in general, are not issued email accounts. Long-term guest teachers are an exception. All 4J email users are expected to use commonly accepted practices. Retired personnel are removed 90 days after July 1 of the year of retirement unless specific exceptions are made for serving on 4J committees or they have been asked to conduct a specific 4J task.

### **Acceptable Use of Email Accounts**

- Using email to fulfill the responsibilities of your assigned position.
- Communication in a professional manner with staff, students, parents, vendors, and the community.
- Incidental personal use during duty-free time.
- Creating 4J hosted web sites, wikis, blogs, and class management systems (Moodle) to facilitate the communication of class information.

### **Unacceptable Use of Email Accounts**

- Violation of Oregon Law ORS 260 on political activity.
- Violation of Oregon Law, School Board Policy, District Administrative Rules, or any provision in the district Student Rights and Responsibilities Handbook.
- The use of vulgar and plainly offensive, obscene, or sexually explicit language in any form.
- Using your 4J email account to subscribe to personal web resources, i.e. Facebook, MySpace, eBay, Twitter, etc.
- Copying commercial software or other material in violation of federal copyright laws.
- Use of the network for financial gain, commercial activity, or illegal activity.
- Accessing another person's individual account i.e. guest teacher, student teacher...
- Sharing of inappropriate materials or their sources with students or adults or knowingly accessing inappropriate materials.

## **Student 4J Email Accounts**

### **General Overview**

All 4J students are issued a 4J email account. All 4J email users are expected to use commonly accepted practices.

- High school and middle school students have their 4J email accounts activated automatically unless a parent or guardian has denied access at the building level or filled out a denial form at the district level. ([Denial Form](#))
  - Elementary students may have their district email account activated with written consent from their parents/guardian and the consent of their teacher. ([Consent Form](#)) Email accounts remain activated on a yearly basis through passive consent until the student is no longer a 4J student. Students granted access to Google Apps for Education will automatically have their district email account activated.
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## Staff Use of Social Networking Sites<sup>1</sup>

The district recognizes the value of student/teacher/parent interaction on educational networking sites (i.e. social networking sites dedicated to professional activity/collaboration/networking). Collaboration, resource sharing, and student/teacher, student/student, and teacher/parent dialog can all be facilitated by the use of networking tools. Such interactivity outside of the school walls can greatly enhance face-to-face classes.

The following are guidelines for maintaining a clear line between personal social networking and professional/educational social networking. Both have a valued place in our increasingly digital lives.

### Your Online Identity

As educators, we have a professional image to uphold, and how we conduct ourselves online impacts this image. As reported by the media, there have been instances of educators demonstrating unprofessional conduct while engaging in inappropriate dialogue about their schools and/or students, or posting pictures and videos of themselves engaged in inappropriate activity online. Mistakenly, some educators assume that being online shields them from having their personal lives examined. Online identities are public and can cause serious repercussions if behavior is careless. For a “4J professional teaching site,” use your 4J email account.

### Friending

One of the hallmarks of online networks, whether personal or professional, is the ability to “friend” others and thus create an online group that shares interests and personal news. **4J School District strongly discourages staff members from accepting invitations to “friend” students within personal social networking sites.** When students gain access into a staff member’s network of friends and acquaintances and are able to view personal photos and communications, the student-teacher dynamic is altered. By “friending” current students, staff members provide more information than one should share in an educational setting. It is important to maintain a professional relationship with students to avoid relationships that could cause bias in the classroom. Social networking can be a way to stay connected with students **after** they have graduated, but even then staff members should use their best judgment when “friending” students who have graduated.

The potential for “friending” parents of students also exists and can create some awkwardness for educators who want to maintain a clear line between their private and professional lives. Those who find themselves in the delicate position of either “unfriending” parents who are already a part of their

social network or of not accepting requests for friendship can use the following language to help them out: “Our district has provided us with guidelines to help us navigate the line between our personal and professional on-line activities. I use my Facebook account solely within the realm of my personal life and would like to maintain that personal/professional distinction. In the spirit of maintaining that distinction I need to not “friend” parents of students.” The following are recommended practices.

### **Recommendations for Professional/Educational Social Networking by Staff**

- Let your administrator, fellow teachers, staff, and parents know about your educational network.
- Use district-supported networking tools (e.g. 4J email account, 4J blog, 4J wiki...).
- Do not say or do anything using a site attached to your 4J account that you would not say or do as a teacher in the classroom. (Remember that all 4J online communications are archived.)
- Have a clear purpose and outcomes for the use of the networking tool, and establish a code of conduct for all network participants.
- Adhere to the district guidelines when posting student pictures and using student names. Use only student initials in an email. (see Acceptable Use Section)
- Pay close attention to the site's security settings and allow only approved participants access to the site.

### **Recommendations for Personal Social Networking by Staff**

- Do not accept students as friends on personal social networking sites. Decline any studentinitiated friend requests and do not initiate social networking friendships with students.
- Use your best judgment when “friending” former students AFTER they have graduated.
- Do not friend parents of students.
- Do not post to or update your page during work hours. Yes, you may be on your lunch break, but others who see your page may inaccurately infer that you are social networking when you should be teaching.
- Remember that people classified as “friends” have the ability to download and share your information with other people. You don’t have control over others with whom they share your information.
- Post only what you want the world to see. Imagine your students, their parents, or your administrator visiting your site. It is not like posting something to your web site or blog and then realizing that a story or photo should be taken down. Once you post something on a social networking site it may be accessible even after it is removed from the site.
- Check your profile’s security and privacy settings. At a minimum, educators should have all privacy settings set to “only friends.” “Friends of friends” and “Networks and Friends” open your content to a large group of unknown people. Your privacy and that of your family may be at risk.

### **Recommendations for All (Personal and Professional) Social Networking by Staff**

- Do not use commentary deemed to be defamatory, obscene, proprietary, or libelous. Exercise caution with regards to exaggeration, colorful language, guesswork, obscenity, copyrighted materials, legal conclusions, and derogatory remarks or characterizations.

- Staff members receiving information on a social networking site that falls under the mandatory reporting guidelines, must report it as required by law (e.g. suspicion of child abuse).
- Stay informed and cautious in the use of all new networking technologies.

## Resources

Should Students and Teachers be Online Friends? Cheri Lucas

[http://www.education.com/magazine/article/Students\\_Teachers\\_Social\\_Networking/](http://www.education.com/magazine/article/Students_Teachers_Social_Networking/)

A Teachers Guide to Using Facebook, Bernadette Rego

<http://www.scribd.com/doc/16957158/Teachers-Guide-to-Using-Facebook-Read-Fullscreen>

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## Student Access to Third-Party “Under 13” Website Services (Google Apps for Education)

### General Overview

- All 4J students under 13 years of age must have a “Google Apps for Education” consent form signed by a parent/guardian and their teacher. The goal is to allow students to use this very valuable tool while following the Google recommendations and staying compliant with COPPA.
- Once students have returned consent forms, Google Apps will remain accessible for the current school year. Use of Google Apps will be suspended at the end of each school year.
- Google Apps consent forms must be renewed at the beginning of each school year.

Schools using Google Apps Education Edition assume the responsibility for complying with the Child Online Privacy Protection Act (COPPA) and the information that students submit. When offering these online services to children under 13, schools must be cognizant that COPPA is a regulation that requires parental consents for the online collection of information about users younger than 13. Per the Google Apps Education Edition Agreement, any school administering Google Apps Education Edition acknowledges and agrees that it is solely responsible for compliance with COPPA, including, but not limited to, obtaining parental consent concerning collection of students' personal information used in connection with the provisioning and use of the Services by the Customer and End Users. In Eugene School District 4J, parental notification and consent will take place in the form of a permission slip granting use of Google Apps for ALL Elementary and Middle school students. This form must be signed on a yearly basis and held on file in the school office.

- [Elementary School “Google Apps for Education” Permission Form \(English\)](#) [Elementary School “Google Apps for Education” Permission Form \(Spanish\)](#)
  - [Middle School “Google Apps for Education” Permission Form \(English\)](#) [Middle School “Google Apps for Education” Permission Form \(Spanish\)](#)
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# Copyright & Plagiarism

## General Guidelines

Adherence to federal copyright law is required in both print and electronic environments. School Eugene District 4J Administrative guidelines states District intent to adhere to the provisions of Public Law 94-553 and subsequent federal legislation and guidelines related to the duplication and/or use of copyrighted materials. 4J guidelines only permit copying materials specifically allowed by copyright law, fair use guidelines, license agreements, creative commons,<sup>1</sup> or proprietor's permission. Additional copyright and fair use information can be found at:

[U.S. Copyright Office Fair Use](#)

[Stanford Copyright Fair Use](#)

[UMUC Copyright and Fair Use in the Classroom, on the Internet, and the World Wide Web](#)

## Acceptable

- Use of copyrighted material with author permission
- Use of copyrighted material that meets the fair use criteria
- Use of copyrighted material that meets the common creative criteria

## Unacceptable

- Using network resources to commit plagiarism.
- Unauthorized use, copying, or forwarding of copyrighted material.
- Unauthorized installation, use, storage, or distribution of copyrighted software.

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<sup>1</sup> Written by Jen Hegna, Information Systems Manager, Byron (MN) Public Schools and Doug Johnson, Director of Media and Technology, Mankato (MN) Public Schools. <http://doug--johnson.squarespace.com/blue--skunk--blog/2009/8/20/networking--guidelines--revised.html>

Adapted for use in the Eugene School District

2 A tool that gives everyone from individual creators to large companies and institutions a simple, standardized way to grant copyright permissions to their creative work. The Creative Commons licenses enable people to easily change their copyright terms from the default of “all rights reserved” to “some rights reserved.” It refers to the body of work that is available to the public for free and legal sharing, use, repurposing, and remixing.

## Administrative Rule G2300.10 - Staff E-mail Usage

*Last Updated: August 10, 2009*

The following administrative rule concerning e-mail use is intended to promote an ethical and professional work environment and to meet the requirements governing the use of District computer resources. District e-mail accounts are provided to current District staff for the purpose of conducting District business, and to students to enhance their educational experience. Staff e-mail accounts will be deactivated upon termination of employment; student e-mail accounts will be deactivated upon graduation or withdrawal.

All District e-mail users are responsible for understanding and observing the District Technology Appropriate Use Guidelines, and all other applicable policies, regulations and laws in connection with their use of District computer technology resources. The District Technology Appropriate Use Guidelines are available on the District's website at [www.4j.lane.edu/cis](http://www.4j.lane.edu/cis). These guidelines require that communications on District equipment be appropriate, professional, and courteous. These guidelines and state law also provide that an employee's District e-mail account is not to be used as a substitute for an employee's personal e-mail account. Using District-provided email for personal correspondence, except on an incidental basis, is prohibited. Conversely District business that is conducted by e-mail should use a District e-mail account and not a personal e-mail account. A personal e-mail account should not be forwarded to a District e-mail account and a District e-mail account should not be forwarded to a personal e-mail account.

All electronic mail records are considered District records subject to potential disclosure under the Public Records Act. Employees and students should have no expectation of privacy in their electronic communications.

All staff and student e-mails sent and received through the District e-mail system are the property of the school system and will be retained (archived) for a minimum of three (3) years. An investigation team will be established when necessary to review archived records. In the case of a litigation hold (a directive not to destroy electronic mail that might be relevant to a pending or imminent legal proceeding) normal retention procedures will be suspended for all related records.

### **Citings:**

Board Policy [KGF](#)

Board Policy [JFCFA/GBNAA](#)

Board Policy [JB](#)

State Law: [ORS 244.040](#)

State Law: [ORS 260.432](#)

# Eugene School District 4J

Code: **KGF**  
Adopted: 6/16/75  
Revised: 4/16/83, 1/7/87,  
4/3/91, 4/17/91,  
5/18/97, 2/18/98,  
3/15/00, 12/11/02

Orig. Code(s): 6900

## Use of District Property

Property including, but not limited to furniture, equipment, materials, supplies, computer software and networks, has been provided for use in the instructional programs and operations of the district. Staff and volunteers should at all times use district property in a manner that is consistent with the district's public purpose and that will not be a discredit to the district. Staff and volunteers shall never use district property to display vulgar and plainly offensive, obscene, or sexually explicit language or images.

### Removal of District Property

Removal of district property from district premises for use by cooperating organizations for school and district-related noncommercial activities must have the prior approval of the principal or supervisor. A principal or supervisor may also approve removal of district property if it is to be used by a member of the school staff and for a public use that is related to the instructional program or operations of the district. Sites shall have procedures to track off-site property and ensure adequate insurance coverage.

### Personal Use of District Property

No person may use district property for personal financial gain, for use inconsistent with the district's public purpose, or in a manner that will discredit the district. Any exception to this policy must have prior written approval of the superintendent or designee and authorized use shall be consistent with ORS Chapter 244. If a use is approved for personal or private purposes, reimbursement to the district to recover the cost of the use shall be established prior to use by written agreement.

District staff and volunteers may from time-to-time use district property for personal communication. When doing so, this property should be used in a manner that is consistent with the district's public purpose, that will not interfere with district operations, and that will not be a discredit to the district. Staff and volunteers shall never use district property that has an associated direct usage charge (e.g., cellular telephones) for personal business unless it is incidental to their assignment.

END OF POLICY

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Legal Reference(s):

[ORS Chapter 244](#)

[ORS 332.107](#)

[OAR 584-020-0040](#)

*Oregon Government Standards and Practices Laws, A Guide for Public Officials*, Oregon Government Standards and Practices Commission (Dec. 1993).



**Process for Handling Complaints Against Staff by Principal/Department Director:**

Please inform all employees that they will be notified in confidence of any complaint against them that is received. In accordance with Article 12.9 of the bargaining contract with the Eugene Education Association, all unit members must be given timely notice of any parent or student complaint. If members are not given notice, the complaint cannot be referenced or used in a performance evaluation or discipline.



Eugene School District

## Guidelines for Political Activity & Advocacy

Public employees cannot use public time or resources to advocate for or against a ballot measure or a candidate. This includes use of our computer network to send information. Using the 4J network and email system for political activity is prohibited, even if it is outside of regular working hours.

Here is a review of state laws and guidelines that public employees and public agencies, including schools, must follow in distributing information about ballot measures or candidates. These rules apply whenever there is an election.

### 1. State Law on Political Activity by Public Employees

Public agencies, including schools, cannot use public time or resources to advocate for or against a ballot measure or a candidate. This includes use of our computer network or other school communication channels to send information.

ORS 260.432(2) states:

“No public employee shall solicit any money, influence, service or other thing of value or otherwise promote or oppose any political committee or promote or oppose the nomination or election of a candidate, the gathering of signatures on an initiative, referendum or recall petition, the adoption of a measure or the recall of a public office holder while on the job during working hours. However, this section does not restrict the right of a public employee to express personal political views.”

### 2. Examples of Prohibited Activities:

- We cannot prepare or distribute written material, post website information, or send email that advocates for or against a ballot measure or candidate.
- We cannot attach to school newsletters or send home with students any materials that advocate or announce a position on a ballot measure/candidate, even if the flyer or material is prepared by an outside group and given to students or staff by a volunteer.
- We cannot include messages such as “Vote Yes on Measure X” or “Support Candidate Y,” or even “Vote For Schools” in school newsletters, email messages or on bulletin boards.
- We cannot provide access to our facilities unless we are providing the same opportunity to groups on either side of a ballot measure.
- We cannot post meeting announcements for groups advocating a position, unless we extend the same opportunity to opposing groups.

### 3. Examples of Allowable Activities:

- Distribution of neutral and objective information is allowed. The district and its employees may provide factual, neutral, and objective information about a ballot measure and the impact it will have on the school district.

- A school may encourage parents to vote and may make voter registration materials available.
- A school's parent group may invite advocates for or against a ballot measure to speak at a school parent group meeting. If a school parent group has an information table at a school activity, they may have information for and/or against ballot measures on the information table. It is important to provide the same opportunities to opposing sides of a ballot measure, if requested.
- A school's parent group may sponsor a candidate forum if it is open to all candidates. All candidates filed for the same office must be invited to participate. (The forum may still be held even if one or more candidates choose not to attend.)
- A school's parent group may share information advocating for or against a ballot measure in their communications, provided no district resources (e.g. computers, copiers, staff time) are used to produce or distribute those communications. It is important to provide the same opportunities to the opposing side, if requested.
- A school facility may be rented by a political candidate or by a group that is advocating a position on a ballot measure. The same opportunity must be available to opposing candidates or groups.
- Wearing of political buttons is a constitutional right of freedom of speech. Staff members may wear political buttons while on the job. Students, parents, volunteers, and other members of the public may also wear political buttons while on campus.
- When on their own off-duty time, not acting in their role, and not using any public resources, public employees may advocate political positions, send letters to the editor, and participate in any other lawful political activity. Salaried public employees are advised to keep records to verify that such political activity occurs while off duty.

The Secretary of State provides a quick reference guide, "Restrictions on Political Campaigning for Public Employees," [http://oregonvotes.org/doc/publications/260.432\\_quickref.pdf](http://oregonvotes.org/doc/publications/260.432_quickref.pdf), that addresses additional prohibited and allowable activities.

If you have a question about whether a particular action or piece of information is allowed, please ask your supervisor or contact the 4J Communications Office (Kerry Delf, [delf\\_k@4j.lane.edu](mailto:delf_k@4j.lane.edu), x7733 direct line, x7737 department line, cell 541-520-6880).

#### 4. Political Activities Notice

Schools and other public employers are required to post a notice (attached) regarding restrictions on political activities in a conspicuous place.

## **POLITICAL ACTIVITIES NOTICE**

ATTENTION ALL PUBLIC EMPLOYEES:

The restrictions imposed by the law of the State of Oregon on your political activities are that no public employee shall solicit any money, influence, service or other thing of value or otherwise promote or oppose any political committee or promote or oppose the nomination or election of a candidate, the gathering of signatures on an initiative, referendum or recall petition, the adoption of a measure or the recall of a public office holder while on the job during working hours. However, this section does not restrict the right of a public employee to express personal political views.

It is therefore the policy of the state and of your public employer that you may engage in political activity except to the extent prohibited by state law when on the job during working hours.

THIS NOTICE MUST REMAIN POSTED IN A CONSPICUOUS PLACE *ORS 260.432 (3)*

Eugene School District 4J | 200 North Monroe St. | Eugene, Oregon 97402

August 2014

# Did You Know?

## Every school employee is required to report suspected child abuse and sexual conduct.

In cases of suspected child abuse by anyone, employees must immediately make a report to the local office of Department of Health and Human Services (541 686-7555) or a local law enforcement agency (call 911), and to the building or other administrator. Every school employee is a mandatory reporter.

In cases of suspected sexual conduct by a school employee, employees must report it immediately to their building administrator and to the Director of Human Resources or designee (541 790-7660).

## District Administrative Rule G2400

*Last Updated: April 21, 2009*

Oregon Revised Statutes ([ORS 419B.010](#)) requires any school employee having reasonable cause to believe that any child with whom he or she comes in contact has suffered abuse or that any person with whom he or she comes in contact has abused a child to immediately report it by telephone or otherwise to the local office of the Department of Human Services or to a law enforcement agency within the county where the person making the report is located at the time of the contact. The report shall contain, if known, the names and addresses of the child and the parents of the child or other persons responsible for care of the child, the child's age, the nature and extent of the abuse, including any evidence of previous abuse, the explanation given for the abuse and any other information that the person making the report believes might be helpful in establishing the cause of the abuse and the identity of the perpetrator.

Abuse is defined in the statute as:

- a. Any assault of a child and any physical injury to a child which has been caused by other than accidental means, including any injury which appears to be at variance with the explanation given of the injury;
- b. Any mental injury to a child, which shall include only observable and substantial impairment of the child's mental or psychological ability to function caused by cruelty to the child, with due regard to the culture of the child;
- c. Rape of a child, sexual abuse, or sexual exploitation;
- d. Negligent treatment or maltreatment of a child, including but not limited to the failure to provide adequate food, clothing, shelter or medical care that is likely to endanger the health or welfare of the child;
- e. Threatened harm to a child, which means subjecting a child to a substantial risk of harm to the child's health or welfare;
- f. Buying or selling a person under 18 years of age;
- g. Permitting a person under 18 years of age to enter or remain in or upon premises where methamphetamines are being manufactured; and,
- h. Unlawful exposure to a controlled substance that subjects a child to a substantial risk of harm to the child's health or safety.

### [Citings](#)

State Law:

[ORS 419B.010](#)

## **District Administrative Rule G2400.01 – Reporting Sexual Conduct or Child Abuse by School Employee Towards Student**

*Last Updated: August 12, 2010*

**Reporting Sexual Conduct or Child Abuse by School Employee Towards Student:** A new law, effective July 1, 2010, requires reporting and other procedures when a staff member is suspected of directed sexual conduct toward a student. Please inform your staff about the requirements below:

1. Sexual Conduct by School employees towards students is prohibited.  
The District strictly prohibits child abuse and sexual conduct by school employees. “Child Abuse” is defined in District Administrative Rule G2400 and discussed above.

“Sexual conduct” means any verbal or physical conduct by a school employee that:

1. Is sexual in nature;
2. Is directed toward a student;
3. Has the effect of unreasonably interfering with a student’s educational performance; and
4. Creates an intimidating, hostile or offensive educational environment.

Sexual conduct does not include behavior that would be child abuse as outlined in District Administrative Rule G2400 - Reporting Child Abuse.

All employees are subject to this administrative rule.

2. Employees need to follow certain reporting procedures in cases of Suspected Child Abuse or Sexual Conduct by School Employee: Any employee who suspects that another employee, contractor or volunteer has engaged in child abuse or sexual conduct must immediately report it to his/her supervisor and the Director of Human Resources or designee who may be reached at 541-790-7660. This reporting obligation is in addition to the duty of every school employee to report suspected child abuse to a local law enforcement agency or the local office of the Department of Human Services.

No reprisal or adverse action will be taken as a result of an employee who initiates a good faith report about suspected child abuse or sexual conduct by a school employee.

3. Administrative Leave and Investigation: In all cases of suspected child abuse or sexual conduct by a school employee there will be an investigation conducted, and in some cases, the district will place an employee on paid administrative leave pending the investigation.
4. Required Training: By law, district employees must receive training each year on the prevention and identification of child abuse and sexual conduct and on employees’ obligations to report. Additional information on the mandatory training will be provided by Human Resource later in the year.
5. Required Posting: The law requires each school building to post the name and contact information of the persons designated for the school building to receive reports of suspected child abuse by school employees and the procedures the person will follow upon receipt of a report. In addition to this notice, please post District Administrative Rule G2400.01 in a conspicuous place.

## **Locked Spaces Announcement**

Please read the following announcement about locked spaces to employees:

The district's practice is to make a locked space available to all employees so they may secure small personal valuables (such as a wallet or purse). The space may be located in the school office, classroom, locking file cabinet, or any other location that you determine is secure. Buildings may also provide employees a locked space inside a classroom or work area by installing a lock on a file cabinet or desk drawer.

Administrators will work with employees to ensure that they are aware of what locked space is available at each site. If a locksmith's services are needed, the administrator will call Facilities and make arrangements with Facilities directly. Please note that there could be a substantial wait time for a locksmith's services because the district's financial circumstance has curtailed this service.



## **Community Educators (Guest Speakers) and Outside Presenters**

Please review the following new administrative rule with your staff:

### District Administrative Rule I1700

We recognize that guest speakers and outside presenters are a valuable resource for enriching district curricula. Community presenters and guest speakers must adhere to the following guidelines:

1. Information presented must be educational, not promotional. Presenters are prohibited from gathering personally identifying information from students. It is allowable for presenters to post their name, the name of the organization with which they are affiliated, and phone number, email address, or other contact information. This contact information should be given in a neutral way and can remain posted throughout the presentation and shall be removed when the presentation is over.
2. The information presented should be age appropriate and relevant to curriculum and classroom instruction.
3. The information must be presented in a neutral and nondiscriminatory manner.
4. District representatives have a responsibility for vetting and supervision of guest speakers and outside presenters. Building administrators have the authority to cancel or stop presentations deemed to be inappropriate.