



## 2017–18 STAFF ORIENTATION

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

- 2017-18 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
- Notice Requirements for Leave
- 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
- Information Regarding Board Resolution Affirming Commitment to a Safe and Supportive School Environment for All Students, Regardless of National Origin, Immigration Status, or Documentation Status.
- School Board Policy: Visitors to Schools and Properties.

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 2017–18 (v1.0)*

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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 FY18**

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Updated August 11, 2017

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## **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. Chart of Accounts (full list of all funds and accounts, with explanations for use)
2. Student Activities Manual (for guidance in spending and recording financial information for funding held in school-based accounts)
3. Grants and Gifts Manual (for Fund 260 activities and receiving donations)
4. Various technical and procedure manuals for financial transactions

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>**

Staff	Responsibility Area	Ext.	E-Mail
Belz, Andrea	Associate Director (Accounting, AP, Business Systems, Payroll, Charter Schools)	7608	belz_a
Blyth, Bob	Budget and Treasury Services	7627	blyth_b
Brown, Monica	CFO & Director of Support Services	7606	brown_mo
Carpenter, Jenny	Accounts Payable	7609	carpenter_je
Cone, Julie	Purchasing	7620	cone_ju
Cowan, Marla	Accounts Payable	7615	cowan_m
Deleon, Danny	Executive Assistant to the CFO and Position Control	7629	deleon_d
Eichler, Janette	Payroll	7613	eichler
Goldberg, John	Budget and Capital Projects Analyst	7623	goldberg_j
Gonzalez, Eugenia	Visas, expense reimbursements, extended contracts, outside billing	7611	gonzalez_e
Gordon, Matt	Business systems	7626	gordon_ma
Gripp, Nancy	Accounting (GL, Student Activities, Grants)	7621	gripp
Hebard, Tyler	Payroll and Accounts Payable Supervisor	7622	hebard
Landeros, Ariana	Accounting (GL) and outside billing	7617	landeros_a
Lane, Christina	Purchasing	7625	lane_c
Langan, Holly	Support Services Manager (KRVM, Nutrition Services, Purchasing, Warehouse)	7610	langan_h
Littrell, Jennifer	Payroll and PERS	7612	littrell_j
Montes, Maria	Accounting (GL, Student Activities, Grants)	7607	montes_m
Myrand, Sharon	Budget and Financial Analysis Manager	7624	myrand_s
Sunderland, Nicole	Accounting (GL, Student Activities, Grants)	7614	sunderland_n

## Financial Procedures for Schools and Departments FY18

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### 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
Deleon, Danny	Executive Assistant to CFO / Position Control	7629	deleon_d
<b>Accounting</b> <span style="float: right;">accounting@, grants@, studentbody@ and billings@</span>			
Gripp, Nancy	General accounting, student activities, grants	7621	gripp
Montes, Maria		7607	montes_m
Sunderland, Nicole		7614	sunderland_n
Landeros, Ariana	Accounting Specialist: General accounting and outside billing	7617	landeros_a
<b>Accounts Payable (AP)</b> <span style="float: right;">acctspayable@</span>			
Hebard, Tyler	Payroll and Accounts Payable Supervisor	7622	hebard
Carpenter, Jenny	Accounts Payable Accounting Clerk: Schools and departments, Commerce Bank payments	7609	carpenter_je
Cowan, Marla	Accounts Payable Accounting Clerk: Facilities, Transportation, Staples (previously Coastwide), Silke & School Specialty	7615	cowan_m
Gonzalez, Eugenia	Accounting Specialist: Visa statements, expense reimbursements, extended contracts, outside billings	7611	gonzalez_e
<b>Budget</b> <span style="float: right;">budget@</span>			
Myrand, Sharon	Budget and Financial Analysis Manager	7624	myrand_s
Blyth, Bob	Financial Analyst: budget analysis & treasury services	7627	blyth_b
Goldberg, John	Financial Analyst: budget analysis, capital projects analysis & fixed assets	7623	goldberg_j
<b>Business Systems (e.g. password reset, system access and security)</b> <span style="float: right;">bussys@</span>			
Gordon, Matt	Business Info Systems Analyst	7626	gordon_ma
<b>Payroll</b> <span style="float: right;">payroll@</span>			
Hebard, Tyler	Payroll and Accounts Payable Supervisor	7622	hebard
Eichler, Janette	PR Accounting Clerk: Payroll A-L	7613	eichler
Littrell, Jennifer	Accounts & Business Systems Specialist: Payroll M-Z and PERS	7612	littrell_j
<b>Purchasing</b> <span style="float: right;">purchasing@</span>			
Langan, Holly	Support Services Manager	7610	langan_h
Cone, Julie	Purchasing: purchase orders, contract processing, VISA card administration, vendor quotes and proposals (RFPs)	7620	cone_ju
Lane, Christina		7625	lane_c
<b>Support Services (Nutrition Services, Warehouse, and KRVM)</b>			
Langan, Holly	Support Services Manager	7610	langan_h

## Financial Procedures for Schools and Departments FY18

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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, phone number, and email	Email <a href="mailto:accounting@4j.lane.edu">accounting@4j.lane.edu</a>
Access to Lawson & Student Activities, including: <ul style="list-style-type: none"> <li>• Asset Management</li> <li>• General Ledger</li> <li>• Student Activities</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, systems for which access is requested, and the level of access needed. If possible, provide the name of the previous employee or another employee with similar access.	Email <a href="mailto:bussys@4j.lane.edu">bussys@4j.lane.edu</a>
Work orders and employee badges	Work order: Name, position, location, and description of work to be performed Badges: Name, position, location, and access (locations and times)	Contact Facilities at 790-7400  Email <a href="mailto:badge@4j.lane.edu">badge@4j.lane.edu</a>
Buyer status (for creating or authorizing POs)	Name, position, phone number, e-mail address, location, and purchasing role requested (buyer, approver)	Email <a href="mailto:purchasing@4j.lane.edu">purchasing@4j.lane.edu</a>
System training request	Employee name, position, location, and type of training needed	Email <a href="mailto:accounting@4j.lane.edu">accounting@4j.lane.edu</a>
Visa card administration	<b>New request:</b> email employee name, position, email, phone number and requested card limits. Note: limits cannot exceed \$1,000 per purchase and \$2,500 per month without the approval of the CFO.  <b>Annual Renewal:</b> Complete Memorandum of Understanding (MOU) - (download form at <a href="http://www.4j.lane.edu/finance/intranet/procedures-and-forms/">http://www.4j.lane.edu/finance/intranet/procedures-and-forms/</a> and submit to purchasing by September 1 <sup>st</sup> .	Email <a href="mailto:purchasing@4j.lane.edu">purchasing@4j.lane.edu</a>

**FINANCIAL TASKS AND TIMELINE**

**Monthly Deadlines**

Secretaries and Finance Clerks complete the following tasks and report monthly:

- Complete receiver for purchase orders and submit invoices to Financial Services Accounts Payable for check runs at least two business days before each check run (Accounts Payable (AP) prints check twice monthly, on the 15<sup>th</sup> (or nearest business day) and the last working day of the month).
- Access monthly Visa statements around the 6<sup>th</sup> of the following month and submit reconciled statement to Financial Services Accounting by the 20<sup>th</sup>.
- Submit timesheets, reimbursements, extended contracts, and all other payroll requests on or before the 15<sup>th</sup> of each month to Financial Services Payroll. Payday is the last working day of each month.
- Submit your monthly student activities bank reconciliation to Financial Services Accounting by the 20<sup>th</sup> of the following month.
- Reconcile the 31211 account (see *Reimbursable Account (31211)*) and pay by the 20<sup>th</sup> of each month.

**Annual Activities**

<b>Month</b>	<b>Annual Activity</b>
October	<ul style="list-style-type: none"> <li>• Special Purpose Reserve Fund beginning balances entered by Finance</li> </ul>
December	<ul style="list-style-type: none"> <li>• 1<sup>st</sup> Billing for additional staffing (Fleet, EEF, PTA/PTO, and Student Body)</li> <li>• Review open PO reports and close POs for completed purchases</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 forms provided to schools and departments for allocations</li> <li>• Budget forms returned to Financial Services (Elem &amp; Middle Schools)</li> </ul>
February	<ul style="list-style-type: none"> <li>• Budget forms returned to Financial Services (High Schools)</li> </ul>
March	<ul style="list-style-type: none"> <li>• Billings for additional staffing</li> <li>• Review open PO reports and close POs for completed purchases</li> </ul>
May	<ul style="list-style-type: none"> <li>• Special Purpose Reserve Fund (Fleet Funds) estimates due</li> <li>• Review financial transactions in preparation for year-end</li> <li>• Resolve open purchase order items for year end</li> </ul>
June	<ul style="list-style-type: none"> <li>• Board finalizes current year budget (including potential fleet transfers)</li> <li>• Board approves budget for next year</li> <li>• End of Year school check outs</li> <li>• Final bills for additional staffing</li> </ul>

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### **Quarterly Activities – High Schools and Middle Schools Only**

Each quarter (December, March, and early June), ASB card proceeds, sports participation fees, and gate receipts need to be submitted to the District office. We no longer need the supporting scholarship documentation. Please keep these records in your office. The breakdown in fees to be sent to the District is as follows:

- 67% of ASB Cards
- 67% of High School Athletics Participation Fees
- 100% of Gate Receipts
- 100% of Track Participation Fees (Middle School only)

### **Month End Closing Activities**

Finance closes each accounting period (“month”) and reconciles accounts and balances. Each period typically closes by the 10<sup>th</sup> of the following month, and journal entry (JE) and budget transfer (BT) 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 reduce the time required to close out accounting records at the end of the year.

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

1. Reconcile student activities 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 pass information to Financial Services (high schools)
8. Review open POs and close as needed
9. Reconcile Visa Statements

### ETHICS

Questions? Contact Accounting at [accounting@4j.lane.edu](mailto:accounting@4j.lane.edu)

#### Who Must Consider Ethics

- All public officials, defined as any person who is serving any public body of the state as an elected or appointed officer, employee, agent or volunteer – regardless of whether the person is paid for such services.
- Also included are relatives (see definition below) and any associated businesses with which the public official or a relative is associated; see Guide for Public Officials and ORS 244.020
- **Public officials are held to a higher standard than other citizens.**

As public officials, all District staff, Board members, and even some District volunteers are subject to government ethics laws (Oregon Revised Statute (ORS) 244). Among other requirements, Oregon government ethic laws prohibit public officials from using their position for financial gain and require public disclosure of economic conflicts of interest. As public officials, District staff and Board members are held personally responsible for complying with the provisions in Oregon Government Ethics law. This means that each public official must make a personal judgment in deciding such matters as the use of their position for financial gain, what gifts are appropriate to accept, or when to disclose the nature of conflicts of interest. If a staff or Board member fails to comply with the law, a violation cannot be dismissed by placing the blame on direction provided by the District (the employer) or the School Board (the governing body).

Note that when a provision in ORS Chapter 244 refers to “relative” it means one of the following:

- **Spouse** of a public official or candidate
- **Children** of a public official or candidate
- **Children of the spouse** of a public official or candidate
- **Siblings** of a public official or candidate
- **Siblings of the spouse** of a public official or candidate
- **Parents** of the of public official or candidate
- **Parents of the spouse** of a public official or candidate
- **Person** for whom the public official or candidate has a **legal support obligation**
- **Person benefiting from a public official** when benefits are from the public official’s public employment
- **Person who provides benefits to a public official** or candidate when benefits are from the person’s employment

#### Who Enforces Oregon Ethics Laws

Oregon ethics laws are enforced by the Oregon Government Ethics Commission (<http://www.oregon.gov/ogec>). The following resources are available from the Commission to guide staff members:

- Guide for Public Officials – the Commission provides a guide to help public officials understand their responsibilities under the ethics law. This guide is available on the Commission’s website

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- Advisory Opinions – the Commission has issued written opinions on a variety of ethics topics, and may have already addressed the topic of your concern. Opinions are available for review on the Commission’s website (click on “Advisory Opinions” on the left-hand side of the webpage)
- Contact Commission – district staff, volunteers and Board members can contact Commission staff at [ogec.mail@oregon.gov](mailto:ogec.mail@oregon.gov) or give them a call at 1-503-378-5105. Commission staff may be able to answer simple questions over the phone; more complex responses are typically provided via e-mail.

### Penalties for Violation

Public officials (e.g. district staff and board members) may be subject to fines and penalties and be held **personally financially liable** for inappropriate activities, including a civil penalty ranging from \$5,000–10,000 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)

### Ethics Guidelines

No Board member, officer, employee, volunteer, 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, volunteer, agent, or a relative is associated.

*District Policy DJ “District Purchasing” goes even further than what is required by ORS 244, and states that “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.”*

### Conflicts of Interest

**ALL employees with purchasing responsibilities** or the ability to recommend or approve a purchase or personal services contract, regardless of funding source, must:

- Report any potential or actual conflict of interest (ORS 244.020) to Purchasing and to their Supervisor, who will be responsible for taking appropriate action. Employees should not participate in any purchasing process or decision-making activity that would potentially benefit themselves, a relative, or an associated business.
- Refuse any gift, gratuity or personal benefit offered by an individual or vendor who is currently, or is seeking to become, a District service provider or vendor

### Other Ethics Guidelines

- Employee private business activities may not be conducted on public time or using public resources such as District supplies, facilities, vehicles, personnel, or equipment; these resources may only be used for authorized district programs and activities.
- Employees may not sell personal property to the District.
- Employees may not use public contracts for personal use. This includes, but is not limited to, accepting special discounts or pricing from District contractors or obtaining free or reduced price goods or materials from contractors.
- Employees may not bid on District solicitations or be awarded an Independent Contractor Agreement (ICA) or personal services contract.



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- Employees should avoid the intent and appearance of unethical or uncompromising practice in relationships, actions, and communications.
- Employees 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

Each public official is responsible for determining if the person or entity offering them a “gift” – something of economic value – is in a position to benefit from a decision or action they would take as part of their position. Additionally, Oregon Statute limits the gifts public official can receive; any gift or gifts with an **aggregate value of \$50** or more during any calendar year from any single source (person or entity) that *could* have an administrative interest in your position cannot be accepted.

- Administrative interest means that they are in a position to benefit from a decision or action you would take as part of your position. For example, a parent of one of your students or a potential vendor/contractor at your school.
- Consider what the public (parents, other students, etc.) perception will be if the gift acceptance became common knowledge.
- If the gift is offered by a person or entity associated with a current or potential public procurement (purchase/contract/ICA) the public official should not accept anything of economic value.

### Purchasing Gifts

- **Employees** may not receive gifts purchased with district managed funds; this includes all federal, state, district, bond, grant, or student body funds.
- **Volunteers** may not be given cash, gift cards or 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 District funds in limited circumstances; see the Gifts and Gift Cards section of this manual. All student “gifts” must be properly authorized and allowable under the terms and conditions of the applicable program or grant.

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

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 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 resources.

## Financial Procedures for Schools and Departments FY18

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- 2. 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.**

Per Board Policy KI "Student Travel Services" the solicitation and sale of travel services to students is prohibited on school property and at district-sponsored activities, including interscholastic activities unless the travel is sponsored by the school district as part of a school activity. The district will not provide information to students about any such program, unless it is a paid advertisement in a regular school publication and states that drug, alcohol, and tobacco use will be prohibited, that the activity is non-school-sponsored, and that it is not warranted by District 4J. The teacher may not use their position or District resources to promote the trip, advertise it or otherwise influence their students to participate. Promotional materials should not reference the teacher's position as a District employee. Even with these safeguards in place, the possibility that an ethics complaint could be brought against the teacher for "personal benefit" exists. As the ethics law places personal liability on the teacher, they must consider this risk in accepting the travel company's offer.

- 3. A staff member uses the District's contract or discount to purchase a computer.**

The staff member may not purchase a personal computer using the district's contract or discount. This is avoiding a financial detriment since the price the District typically pays is lower than the price paid by the public.

- 4. An employee attends a conference and wins a raffle drawing. The prize is a laptop computer.**

The laptop would likely be considered a gift unless anyone could attend the conference and participate in the drawing (e.g. including the general public). As it exceeds the \$50 limit the employee must either decline the laptop or accept it on behalf of the District and give it to their school or department.

- 5. A teacher receives flowers for her birthday (\$30 value) and a \$40 restaurant gift for teacher appreciation week from the same family.**

A student's family has an administrative interest in the decisions made by their child's teacher. As a result, the teacher cannot accept gifts valuing over \$50 in a calendar year from the family.

- 6. 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.**

Unless the employer specifically indicates this use, the donation is considered a benefit to the school and not for the individual student. The donation should be used for the school or classroom and not for the individual student's benefit.

- 7. 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.

- 8. 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 directly as there are very specific ethics rules regarding this type of offer and acceptance may have the appearance of violating state and district

## **Financial Procedures for Schools and Departments FY18**

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purchasing rules. Very limited exceptions for essential district business purposes may be allowed with Superintendent approval and the funding for the trip must flow through the District.

**9. 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.**

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 pays the additional cost. In addition, if the "work" portion of the trip is cancelled the employee could be responsible for additional travel costs.

**10. 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 [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.

#### **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, and bond-funded projects and initiatives.
- 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 Law**

All revenues and expenditures in the above funds are considered **public funds** and are subject to federal and state laws as well as District policies, procedures, and guidelines. 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 FY18

### Budget Preparation by Fund

HOW ALLOCATED	WHEN ALLOCATED	SPENDING PURPOSE	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 staffing	In budget process; part of classified staffing allocation	Schools receive an equivalent allocation in classified staffing hours from the targeted funding source.	
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	October	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	Annual	Specified by grant application	<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

*Not accountable for budget for items above ("FTE-based" allocations)*

#### Discretionary Funds

- Per pupil allocations and other flat grants to pay for supplies, materials, services and *some staffing costs* such as:
  - overtime
  - temporary help
  - extended contracts
  - substitutes
  - supervision
- Targeted staffing
- Other staffing, professional development, or materials and supplies.

### SPECIAL PURPOSE RESERVE (Fund 290)

- Dollar amounts transferred from the General Fund in previous years
- 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

# Financial Procedures for Schools and Departments FY18

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## 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 or CPI increases.

### 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

### 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

### 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 gift or grant (Fund 275)
- Staffing charged at average costs

# Financial Procedures for Schools and Departments FY18

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## Chart of Accounts

### Using the Chart of Accounts

All funds received, expended, and held by the District are tracked through a shared Chart of Accounts. **All funds, including student activities funds held by schools, are recorded using the Chart of Accounts and following public funds guidelines.** The District follows the Program Budgeting and Accounting Manual (PBAM) provided by the Oregon Department of Education (ODE), which is designed to provide consistent classification of financial transactions. The accounting code structure and reporting system complies with Generally Accepted Accounting Principles (GAAP) and assists the District with reporting to federal, state, and other organizations.

### 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/>).**



# Financial Procedures for Schools and Departments FY18

## Discretionary Budget

### Overview of Discretionary Budget

- Mainly per pupil allocation; includes other allocations of custodial supplies, flat grants, small school funding
- Budget guidelines suggest appropriate uses (<http://www.4j.lane.edu/finance/intranet/budget/>)
- Actual spending is at principal's discretion
  - Subject to legal uses of public funds
  - Subject to district spending policy and procedures
- 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 sidebar on the left lists various report categories like 'All', 'History', 'Favorites', 'Unsubscribed Email', etc. The main area displays a table of reports. A yellow 'Add to Favorites' button is visible above the table. Callouts provide instructions: (1) Sort reports alphabetically by clicking the '^' symbol next to the 'Description' column header. (2) Mark the box next to the report(s) you frequently use. (3) Click the 'Add to Favorites' button. (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

# Financial Procedures for Schools and Departments FY18

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## 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)
  - Excludes salaries/benefits not controlled by school
  - Eligible for Special Purpose Reserve Fund Transfer
  - Instruction Department projects
  - Includes sub accounts 899 Literacy and 849 Avid Program
  - 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 (Fleet Fund)
- **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 (Fleet Fund)
  - 490 – Capital Equipment Reserve (Fleet Fund for capital expenditures only – limited to 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.
  - o Alternative High Schools should select the **Alternative High School Current School Financial Review (4JGL001b)**.
3. Enter the **fiscal year** (e.g., 2018).
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 Funds. 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 charged to other funds, if appropriate money is available, or covered by the Instruction Department.

#### 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 FY18**

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At the beginning of May, 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 in October.

# Financial Procedures for Schools and Departments FY18

## Sample Current School Financial Review Report

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

1  
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
1001042548000	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 eligible for transfer 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.

## Financial Procedures for Schools and Departments FY18

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### Reimbursable Account (31211)

The Reimbursable Account provides a mechanism to record expenditures lacking documentation for posting to a specific account in the general ledger (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**
  - Any balances owed in the Reimbursable Account should be paid before fiscal year end or they may be moved to an expenditure account in the discretionary budget. If you end the year with a balance in your 31211 account submit payment to the District no later than August 31<sup>st</sup>.
  - In Account Detail by Account Report, enter prior fiscal year, enter accounting unit 100xxx, then 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 5 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 there is a liability to the district funds.

Contact Accounting for help reconciling this account if needed.

# Financial Procedures for Schools and Departments FY18

## Special Purpose Reserve Fund (Fund 290)

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

- The unspent balance carries over to the subsequent year, subject to annual approval by Superintendent.
- Funds accumulate in this Special Purpose Reserve Fund annually when there are remaining discretionary dollars in the General Fund that have been requested by the school or administrator to carry forward, and approved by the Superintendent and Board. **Financial Services will notify sites in May of the deadline to make this request.**
- Carryover funds are typically entered by October after the District's year-end close 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., 2018).
4. Enter **290** in the Fund field.
5. Enter the 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 8/20/2014 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	
<u>Accting Unit/Acct/SubAcct</u>	<u>Account Description</u>	<u>Budget</u> <u>Encumbrance</u> <u>Expenditure</u> <u>Balance</u>
2905572411000 460 0	MONRO SP/P RES PRINCIPALS:NON-CONSUMABLE SUPPLIES	0.00    341.51    5,645.05    -5,986.56
2905572411000 480 0	MONRO SP/P RES PRINCIPALS:COMPUTER HARDWARE	29,249.11    0.00    -898.00    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 FY18

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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 Lawson report for "Current School Financial Review" 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 request amount (see last two lines 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 MAINT: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
Example School estimated additional expenses							-34,500.00
Example School amount to transfer							25,798.00

*(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).)
  - As the transfer request is typically submitted in early May, estimate any remaining May and June transactions such as: VISA, postage and printing, transportation charges, and other billings, including staffing.
4. If there are 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.
5. Email Budget ([budget@4j.lane.edu](mailto:budget@4j.lane.edu)) with any questions, and when ready, the amount requested.



### 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.

### Targeted Staffing

For 2017–18 targeted funding balances have been converted to an equivalent amount of classified employee hours for each school. These hours were included in staffing allocations provided by Human Resources. Schools use this staffing just like regular staffing allocation. This eliminates the need to track staff hours paid from targeted funds and bill schools throughout the year. Requests to convert this allocation to targeted funding must be approved by the Director of Elementary Education or the Director of Secondary Education prior to submission of staffing plans for the upcoming school year.

### Budgeting for Additional Staffing

Use the staff conversion and costing table and calculator available on the Financial Services intranet Budget Preparation section (<http://www.4j.lane.edu/finance/intranet/budget/>) to estimate the cost of additional classified staff hours or changes to licensed FTE. These resources are helpful for estimating staffing costs for grant proposals, new program planning, and other staffing reviews. The rates in the calculator are updated annually and the budget team can help with staffing costing as needed.

## 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” 4JGL019 on the “4J Reports/4J Custom Reports” bookmark
- Remember, actual costs do not need to match the exact budget line as long as the total costs do not exceed available budget.

### 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 (4JGL018)

## Financial Record Retention

**Financial Services is the official record retention site for all financial information** other than Student Activity transactions, monthly leave reporting, and comp time. All financial records shall be retained in compliance with Oregon Administrative Rules (OAR) and District policy.

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

- In general, student activity financial records should be retained for four years as directed in OAR 166-400-0025
- Retention for student organizations (clubs, student government and activities) is three years after the school year in which records were created per OAR 166-400-0025(23).
- If the school receives and expends federal funds through its student body account, all associated financial records must be retained at least five years after final or annual expenditure report acceptance by the federal agency.
- Retention of monthly leave reporting and comp time records is four years per OAR 166-400-0045(4).

## **SPENDING AUTHORITY AND CONTROLS**

Questions? Contact Purchasing at [purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu)

### **IMPORTANT:**

- Guidelines apply to spending for all funds, including student body accounts and grant funds.
- Two *types of authority apply: Signing Authority and Purchasing Authority*
- 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 expenditure or signing 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 has delegated authority for general contracts not exceeding \$150,000; public improvement contracts not exceeding \$100,000; and specific construction and bond-related contracts exceeding \$500,000.
- Spending limits include all purchases from one vendor; splitting a purchase between payment sources or invoices to avoid purchasing policy requirements is prohibited under state law (ORS279B.065(2)) and district purchasing policy.

### **Public Funds Spending Guidelines**

As a public entity, the district is held to a high standard of stewardship for public resources. Records can be subject to review, under the Oregon Public Records Law, at any time by anyone. Travel, meals, entertainment, food, and employee reimbursements are common areas for public inquiry and investigation. Staff are required to exercise prudent judgment so as to maintain proper stewardship of taxpayer dollars. The following procedures assist staff with ensuring that expenditures are reasonable and comply with laws and policies.

### **Signing Authority**

Oregon law requires the School Board to approve all contracts or delegate the authority to do so. Signing a contract without board delegated authority results in personal liability for payment. The Board has delegated authority to sign general contracts less than \$150,000, without prior Board approval, to the Superintendent (Clerk), the Assistant Superintendent for Instruction, the Chief Financial Officer, the Director of Human Resources, the Director of Facilities and the Associate Director of Financial Services (Deputy Clerks). The Superintendent has delegated the authority to sign contracts \$50,000 or less to the Support Services Manager, who oversees the central purchasing function for the District. Public improvement contracts less than \$100,000 and construction contracts less than \$500,000 may be signed by the Director of Facilities in specific circumstances without prior board approval, with the understanding that they will be brought to the Board in a timely manner. For contracts exceeding these levels of authority, the Clerk or a Deputy Clerk may sign once Board approval has been given.

## Financial Procedures for Schools and Departments FY18

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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.* Purchasing processes all agreements for proper signing authority. Purchasing requests submission of agreements or contracts **at least 2 weeks in advance** to ensure sufficient time for review, verification of legal sufficiency, and signature. Contracts that do not meet the minimum legal requirements of state law and District policy may require a longer turn-around time, as Purchasing may need to contact the other party and request modification of the contract terms.

### Summary of Authorized Signers

- **Purchase Orders \$1,000 and under** can be approved and signed by an administrator or program manager (usually a principal) with delegated purchasing authority.
- **Only the Clerk, a Deputy Clerk, or other Designee** (Superintendent, Assistant Superintendent, Chief Financial Officer, Director of Human Resources, Director of Facilities, Associate Director of Financial Services, and Support Services Manager) have authority as delegated **to sign contracts and agreements**, or similarly 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/>. Principals and administrators sign these agreements to indicate that the services requested are required by the District, comply with District policy requirements, and that there are sufficient funds available to pay for the services. However, the ICA is not a legal contract until it has also been signed by a Clerk, Deputy Clerk, or the Support Services Manager.

### Purchasing Authority

A summary of purchasing authority guidelines is in the following table; note that any related contracts must be authorized as outlined under Signing Authority.

Required Authorization	Schools and Departments	Facilities
Principal or Program Administrator/Manager	\$1,000 or less	\$5,000 or less
Instruction Dept. Directors and Program Managers	\$5,000 or less	
Support Service Manager	\$50,000 or less	\$50,000 or less
Department Directors	\$150,000 or less	\$150,000 or less
Clerk or Deputy Clerk (based on delegated authority – some purchases require formal solicitation and Board approval)	All Purchases	

Note that purchasing staff releases all PO's exceeding \$1,000 once authorization is documented (email or hard copy approval).

# Financial Procedures for Schools and Departments FY18

## 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.

### 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 verbal or written quotes required
\$75,000 to \$149,999	Three <i>written</i> quotes required
\$150,000 or more	Formal bid/proposal and Board approval required

### Quote Requirements for Personal Services (including ICAs)

Spending Total	Quote Requirement
Less than \$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 Purchasing staff regarding:

- finding a suitable vendor;
- frequently purchased items for which the district has no contract;
- vendors not performing as agreed;
- difficult vendors; and
- meeting with vendors (*while staff may meet with vendors, there is no obligation to do so*).

## Buying Equipment

### Purchase Order for Buying Equipment

For equipment purchases, Purchasing recommends using Regular Purchase Orders.

*Asset inventory.* When Accounts Payable processes an invoice for an item with a PO line coded to account 460, 480, 541, or 542, the purchased item will automatically be transferred to the "Move to Inventory" screen in the Asset Inventory Management System.

## **Financial Procedures for Schools and Departments FY18**

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If a not-to-exceed PO is used to purchase equipment, then 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, 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 technology asset inventory management database.** Computers should be purchased using a purchase order to ensure tracking for inventory and insurance purposes. Prior approval from Technology is required to purchasing computers, computer related items, and software.

**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 if they are not in the technology database.** Schools and departments may record other items in the asset inventory management system 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 source of funding (federal grant name and CFDA#, if known) 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

## **Financial Procedures for Schools and Departments FY18**

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- Funding used for purchase
- Disposition

“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 [purchasing@4j.lane.edu](mailto:purchasing@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 regardless of the purchasing method used (PO, Visa, Student Body check, payroll reimbursement).

### Methods of Purchasing

The District provides three methods for completing non-student body purchases, including:

1. Purchase orders (POs)
2. Purchasing card (District Visa 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)

Principals and select Program Administrators may approve and sign POs up to \$1,000. 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:

- Four types: regular, not-to-exceed, confirming, VISA over \$1000
- 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 for which an invoice has been received and for goods that you already have in possession or services that have already been rendered.
- VISA PO's over \$1,000 should be used when the authorized purchase exceeds \$1,000 and there is no other avenue to pay a vendor (such as a PO or check). This type of PO may also be used for Office Depot and Amazon Business purchases – contact Purchasing if you need to make a larger purchase from one of these vendors.
- **Make sure any POs less than \$1,000 are signed by the Principal or Program Administrator and the terms and conditions are sent to the vendor.**



### District Purchasing Cards (Visa)

#### Overview

Positions with frequent purchasing or travel responsibilities may be considered for assignment of a District VISA credit card. The Visa card is designed specifically for District use in purchasing low dollar materials and supplies, as well as for select District-approved travel and training expenses. Using a Visa to make purchases is a way to streamline processes and decrease costs by reducing the number of low dollar purchase orders. Authorized employees are provided an individual card with pre-determined transaction limits and monthly spending limits established by the responsible administrator. Because Directors, principals, and supervisors are responsible for the budgets that are used by credit card holders, they are to review the list of cardholders at their site annually and determine ongoing needs for cards.

Annually, all authorized cardholders sign a memorandum of understanding (MOU) that affirms they will be held responsible for maintaining sole possession and security of the card at all times and complying with district purchasing policies when using the credit card. The signed MOU should be returned to purchasing by September 1<sup>st</sup> 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

Directors, principal, and supervisors 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. Principals and Directors should email purchasing directly 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 10<sup>th</sup>.
- Obtain approval for statement. Cardholders do not approve their own statement.
- Submit to Finance by the 20<sup>th</sup> of the 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
- Maintain physical custody of the credit card (each card holder).
- Report a lost or missing card immediately to US Bank (800-523-9078) and Purchasing.
- Cardholder is responsible for working with US Bank on all fraud events.

#### Credit Card Limits

- Card limits should not exceed \$1,000 maximum for a single transaction and a \$2,500 monthly spending limit, unless approved by the CFO
- Limits must align with the district spending limits.

## Financial Procedures for Schools and Departments FY18

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- Purchases exceeding \$1,000 should be completed using a special purchase order (PO) – the VISA PO over \$1000. Contact Purchasing for assistance if you have never processed this type of PO.

### Access Online

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

### 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, including preapproval by authorized staff.

### Unallowed Credit Card Purchases

- Technology (unless prior approved is obtained from the Technology department).
- Items that do not comply with district policies and procedures. Examples include:
  - 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).
  - Gifts for staff, volunteers or students (unless explicitly allowed in policy or grant terms).
  - Flowers (prohibited except for graduation).

### 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 team 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.

## Financial Procedures for Schools and Departments FY18

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- 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 cannot approve their own statement.
  - Send to Accounts Payable 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 unless authorized by Purchasing.
- Do not select the option to “save credit card information.”
- Ship directly to a district location. District purchases should never be received at home addresses.
- Accepting site Terms and Conditions to complete a purchase is the same as signing a contract; contact Purchasing before completing the purchase.

### **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

## Financial Procedures for Schools and Departments FY18

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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 or Suspending 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 an administrator, 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 the MOU agreement.
- If an authorized *Credit Card Payment Statement Form* with all required supporting documentation for purchases is not received by Accounts Payable within one month of the applicable statement due date, the employee's card will be suspended and no additional charges will be allowed. This suspension will not be removed until all required reporting has been received and verified by Accounts Payable.

### **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.
- 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) unless this is explicitly allowed in their employment contract with the District.
- 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.

### **Intergovernmental 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. See the Signing Authority section for staff authorized to sign these agreements.

### Independent Contractor Agreements (ICA)

Independent Contractor Agreements (ICAs) are for non-employee service agreements. The ICA must be completed and **signed two weeks in advance of the work being performed**. See the Signing Authority section for staff authorized to sign these agreements. **NEW IN FY18: ALL PAYMENTS FOR ICA'S AND PERSONAL SERVICES CONTRACTS MUST BE PAID THROUGH LAWSON VIA A PURCHASE ORDER.** If outside funds (student body, parent group, etc.) will be used to pay for these services take the following actions:

- Add subaccount 998 to the accounting code – this will alert Financial Services Billings that a check will be sent to reimburse the District.
- When the work has been completed, submit the vendor invoice/bill to Accounts Payable for payment. Indicate the PO # on the invoice/bill for efficient processing.
- Ensure that a check is issued to the District for these charges.

***Even when a quote is not required, all*** personal service agreements require an ICA or other written contract /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 may be required as part of the ICA if the contractor has the potential to have unsupervised access to students and/or District facilities. 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 pay the required fee in Financial Services. They will then receive communication from Purchasing on how to complete the process. If the contractor will not have the potential of unsupervised access to students or the facility it is a requirement that the supervising 4J employee must confirm that they will be responsible for supervising the Contractor at all times.

#### 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 must be approved by a Director. This can be evidenced by: a) having the ICA signed by the Director, b) issuing a purchase order for the services which is approved by the Director, or c) providing an email that evidences director approval to Purchasing. Purchasing will ensure that approval is given prior to forwarding any ICA for final signature by a Clerk, Deputy Clerk, or the Support Services Manager. Note: Instruction-related ICAs over \$5,000 must also be approved by the Assistant Superintendent for Instruction.
- Contractor must be able to verify qualification as independent contractor, such as:
  - 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.)

## Financial Procedures for Schools and Departments FY18

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- 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 contractor payments are expected to be 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 contractor payments are expected to exceed \$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 Purchasing and documented in the form of an email.
  - Due to IRS requirements, **payment may not be made without a completed ICA**. Any penalties for missing contracts will be paid by the department or school.

### **DISTRICT-WIDE ICA USE PROCESS**

- Review the directions and available District-wide ICA’s listed on the Financial Services Intranet at <http://www.4j.lane.edu/finance/intranet/procedures-and-forms/>. The list will provide each vendor, their point of contact, contact information, the service(s) they provide, and the status (which includes the ICA reference number) of the ICA. Status will determine if the contract is ready for use. If “In Process” is listed, your school/department will need to process a separate ICA until the District use ICA becomes available.
  - Once you have determined the appropriate contractor you **MUST**
    1. Connect with the contractor to determine dates and times for the event
    2. Complete the District-wide ICA use tracker prior to the contractor being on site – found at <http://www.4j.lane.edu/finance/intranet/procedures-and-forms/>
    3. Submit the COMPLETED use tracker by following the directions available at the above link prior to your event to purchasing at [purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu).**\*\*NOTE\*\*** There are vendors that have specific instructions. The specific instructions are listed on the directions document. There can and will be additions to the list and directions as ICA’s are added. Please read them in their entirety.

### **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, is 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.

## **GUIDELINES FOR COMMONLY USED ACCOUNTS**

Questions? Contact Accounting 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**

***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 (PD)**

#### **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) who are expected to work with their supervisors on a professional development plan. Spending must follow district guidelines, as it is use of District funds, and be for the benefit of the employee. Use of these funds for other purposes or employees, even with the permission of the administrator, is not an allowable use of funding.

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

When PD funds are budgeted through account 241, related expenditures should also be recorded to that account. PD expenditures beyond employee-contracted benefit costs should be expended to the applicable account (e.g. out of district expense).

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

#### **In-District Food Purchases for Meetings**

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 the District to pay for that meal; however, meals must be reasonable in the eyes of the public. Meetings should be scheduled over meal periods **only when it is the most efficient and effective**

## Financial Procedures for Schools and Departments FY18

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**option** for conducting District business – the general expectation is that meetings will not interfere with employee break or meal times.

District funds may not be used for food or beverage purchases for either of the following:

- regularly scheduled staff meetings
- refreshments for office social events such as celebrating holidays or birthdays

District funds may be used for food or beverage purchases for the following events:

- District training sessions, workshops or staff work group/committee meetings scheduled over a meal period and *no meal break is provided by the District* (e.g. staff are not provided sufficient time to leave the location and obtain a meal or conduct personal business).
- Meetings involving members of the community who are voluntarily assisting the District in its mission (e.g. lunch or dinner for a committee meeting that is scheduled over a mealtime).
- Meetings of at least 10 people that last longer than one hour (**refreshments only** unless the meeting is scheduled over a meal period and *no meal break is provided by the District*).
- Grant-funded events when refreshments or meals were included in the grant proposal and approved by the granting agency.

The timeframes below provide guidelines for which, if any, meals or refreshments may be provided.

<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

Additional considerations for in-district food or beverage purchases include:

- Receipts and invoices must be itemized
- Documentation supporting the expenditure must include a list of attendees and describe the District business/educational purpose.
- Alcohol costs are non-reimbursable.
- Costs exceeding the spending limits noted below are not eligible for reimbursement; any over-expended District Funds will be paid with personal funds.
- Exceptions to these guidelines require preapproval by the Superintendent, including any food or beverage purchase with public funds for staff celebrations.

### **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 2017, the full-day rate is set at \$59.00 per person. The following guidelines provide the per meal maximum cost per person including gratuity:



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Meal(s)	Spending Limit with Gratuity	Per Person Limit
Breakfast only	25% of per diem limit	\$14.75
Lunch only	25% of per diem limit	\$14.75
Dinner only	50% of per diem limit	\$29.50
Refreshments only		\$ 5.00

### In-District Travel and Mileage Costs

1. Employees attending functions within driving distance should commute together if schedules permit.
2. 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 and a District Visa cannot be used for related travel purchases (e.g. gas).**
3. When preapproved by a supervisor, use of an employee's personal vehicle for District business will be reimbursed at the IRS mileage rate for miles as supported by documentation (e.g. Google Maps). The actual expense for tolls and parking is reimbursable and must be documented with receipts.
4. Commuting mileage is not reimbursable as it is a personal expense and defined as the distance from the employee's residence to their primary workstation.
5. Staff retreats may be scheduled with prior approval of the Superintendent or Assistant Superintendent.

### Out of District and Out of State Travel

District employees may be authorized for travel when required for essential professional development or attendance at specific conferences or meetings related to District operations, programs, or curriculum. Staff are expected to use sound judgment to ensure travel and related expenses are necessary and reasonable. Non-travel options for training are preferred (e.g. web-based trainings, group onsite training, videos) when comparable and less expensive.

#### Qualifying Overnight Travel

- Lodging is allowed for trips that exceed 75 miles one-way, unless preapproved by a supervisor (exception for safety, multi-day event, or other issues may be considered)
- Overnight travel within the state should be for events that span at least two days.

#### Procedure for Requesting Approval and Reimbursement for Travel

1. Traveler completes the Travel Approval Request form (<http://www.4j.lane.edu/finance/forms/>)
  - Estimate all travel costs and consider expenses for lodging, air and ground travel, mileage, meals, parking, registration, baggage fees, substitute, etc.
  - Include the funding source for travel (such as PD funds, grant, general fund, etc.). Note that reimbursements may be limited in certain instances by contractual restrictions found in some grants, by the availability of funds, or by the approving administrator. Travelers should determine whether there are any such limitations before committing to travel. *Note: Perkins grants require actual receipts for all reimbursements-schools will be responsible for any charges that cannot be billed to Perkins.*

## **Financial Procedures for Schools and Departments FY18**

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- Provide the conference or event agenda as applicable
2. Traveler submits Travel Approval Request form to Supervisor
  - All out of district travel **must be preapproved by a Director** for each employee.
  - All out of state travel **must be preapproved by a Director and the Superintendent** for each employee.
3. Supervisor or last signer submits completed and approved form to [accounting@4j.lane.edu](mailto:accounting@4j.lane.edu). Finance uses the preapproval to review related expenditures, such as backup for employee reimbursement requests. Only preapproved costs will be reimbursed.
4. Traveler requests substitute coverage (as applicable and authorized).
5. Traveler completes travel and submits reimbursement form to supervisor, including original receipts for all expenditures except meals (paid at per diem except for Perkins related travel or other funder limitations).
6. Supervisor verifies appropriateness of reimbursement and submits approved form with backup documentation to payroll.
7. Payroll processes reimbursements received by the 15<sup>th</sup> with the next payroll (last working day of the month).

### **Additional Travel Considerations**

- Costs in excess of approved travel reimbursement and available funding will be covered by employee's personal funds.
- Travelers with a District Visa are not allowed to purchase meals or food with their credit card. Allowable meal per diem or reimbursement amounts must be requested through the travel reimbursement process.
- Additional costs of travel for personal time (e.g. vacation added onto travel) or an accompanying spouse/family member are not reimbursable and are the sole responsibility of the employee.
- 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 Superintendent.

### **Food and Beverage Costs while Traveling**

Employees may be eligible to receive a per diem for meals during authorized District travel. Food and beverages cannot be charged to a District Visa during travel to prevent accidental payment for both the charged meal and a per diem reimbursement. Once travel is complete, the reimbursement form is submitted and meals eligible for per diem will be paid to the employee. Current per diem rates by location can be accessed on the GSA website (<http://www.gsa.gov/portal/content/104877>). Note that if travel related meals are accidentally charged to a District Visa, then the amount charged will either be deducted from the employee's travel reimbursements or the employee will be required to reimburse the District.

## **Financial Procedures for Schools and Departments FY18**

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### **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 airfare are not reimbursable.
- If an employee chooses to use a 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%.

### **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 example, the maximum reimbursable room rate in Eugene is \$110.00 plus applicable taxes per day through September 2017. Any difference must be supported by a business reason and approved in advance by a Director.
- Staff should request the government rate, or lowest rate available.
- Lodging may be paid for in advance with a District Visa; hotels typically also require a credit card to be on file for incidentals. For travel involving multiple staff members where the charges would exceed regular Visa card limits, please contact Purchasing at [purchasing@4j.lane.edu](mailto:purchasing@4j.lane.edu) for assistance.
- 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.

## Staff Celebrations and Flowers

### Staff Celebrations

Costs related to staff celebrations must be paid with non-district or personal funds.

### Flowers

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

## Gifts and Gift Cards

Gifts are generally not an allowable use of District funds. Below are specific procedures related to gift giving.

### 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 funds may not be used to purchase gifts for employees. Please see the *Ethics Guidelines* section of this guide for more information on employees accepting gifts from other organizations or individuals.

### Students

Generally, District funds should not be used to buy gifts for students. An allowed student exception might be the payment of living or transportation expenses associated with a District program or grant specifically designed for that purpose. For example, such payments may be a part of the District's McKinney Vento program. Students may also receive "gifts" as part of a District incentive program. See comments below for more information:

- 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 purchases 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:

## Financial Procedures for Schools and Departments FY18

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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:
- 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 for the request for reimbursement.

## Payroll

### Payroll Assistance

Please contact Payroll at [payroll@4j.lane.edu](mailto:payroll@4j.lane.edu) for questions and general assistance. For reference, employee payroll processing is assigned as follows:

Janette Eichler:	A–L	790-7613
Jennifer Littrell	M–Z	790-7612

Note: extended contracts and employee reimbursements are processed by Eugenia Gonzalez. She can be contacted at [Gonzalez\\_e@4j.lane.edu](mailto:Gonzalez_e@4j.lane.edu) or x7917.

### 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 by the end of the next business day following the 15th.

### Payroll Forms: Direct Deposit Request

Direct deposit forms are due by the 15<sup>th</sup> of the month for current month payroll. Forms received after the 15<sup>th</sup> will be entered if possible up to the point in time that payroll records are transmitted to the bank (about 3 business days before payday). 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> , <http://www.4j.lane.edu/finance/intranet/procedures-and-forms/> and <http://www.4j.lane.edu/finance/forms/>.

## **Financial Procedures for Schools and Departments FY18**

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The web page forms:

- Are the current official version
- May be completed directly on-line
- May still be printed and completed manually
- 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/>. Initial access to the My Pay Stub website requires a six digit employee number and an employee-selected password. Note: to display wage statements the employee must enter the last four digits of their social security number when prompted. Wage statements for employees who receive a paper check are attached to their check and are not available through My Pay Stub. Employees are directed to access Lawson Employee Self Service for historical information regarding their monthly paycheck.

### **W-2s**

W-2's are not available online. To receive a copy of a W2, e-mail your request to [payroll@4j.lane.edu](mailto:payroll@4j.lane.edu) from your 4J District e-mail account. Requests will be completed within 3 business days. Copies can be mailed to the employee's official 4J home address or picked up at the Finance Office – indicate your preference when submitting your request. W-2's cannot be e-mailed to staff.

### **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 leave 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.

## **Financial Procedures for Schools and Departments FY18**

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### **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, written 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 and substitute 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
  - Comp time balances must be paid when an employee discontinues working for the district - notify principal, human resources and payroll

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

- Payment for special or one-time projects over and above the employee's assigned work (**these positions are 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/>)

### **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>
Contract management, 4J staff hiring and reviews, budget oversight, site reviews, and policy issues	<b>Holly Langan</b> , Support Services Manager x7610 <i>langan_h@4j.lane.edu</i>
Program and kitchen operations, inventory management, USDA compliance, financial reporting, program information for schools and parents	<b>Kaylynn Olney</b> , Sodexo Director x7658 <i>kolney@4j.lane.edu</i>
Kitchen staff supervision, including safety and training, Mealtime support for staff	<b>Julie Whittlesey</b> , Sodexo Assistant Director x7655 <i>whittlesey_j@4j.lane.edu</i>
Dietician (including menus and allergies)	<b>Marquis Scurlock</b> , Sodexo Dietician x7657 <i>scurlock_m@4j.lane.edu</i>
Free & Reduced applications, accounting questions, USDA/ODE claim billing, Mealtime payment questions, financial reporting	<b>Karla Bengtson</b> , Accounting Clerk x7659 <i>bengtson_k@4j.lane.edu</i>
General questions, employee time reporting, substitute coordination	<b>Terry Hafdahl</b> , Program Assistant x7656 <i>hafdahl@4j.lane.edu</i>
Free & Reduced applications, negative meal account balance notifications, employee PD tracking	<b>Diann Rosenburg</b> , Department Assistant x7653 <i>rosenburg_d@4j.lane.edu</i>

### **Free and Reduced Applications**

**Free and Reduced Applications may be completed electronically and are available from the 4J web site:** <http://www.4j.lane.edu/nutrition/freelunch>. Paper copies can be provided to schools by request. 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 free and reduced meals program drop date for families who do not submit a new application is October 13, 2017.**

## 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. 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. If you are interested in an item, please enter a work order, and warehouse staff will notify you of item availability. Access to the system can be obtained by contacting Facilities.

#### Items Available for Loan

1. Tables – 8 feet, rectangular, 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)

**Please place requests for loaner equipment at least 2 weeks prior to your event to ensure availability and to allow warehouse staff time to schedule delivery**

#### Discarding Books

Discard books must be placed in boxes for pickup by the Warehouse. As books can be heavy and pose a lift hazard, please use reasonably sized boxes (no larger than the size of copy paper boxes). Boxes should only contain books – do not include other items such as instructional aids, flipcharts, tapes or blocks.

## Financial Procedures for Schools and Departments FY18

### 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	EA	2.16
13004	BOX CARDBOARD 15"X12"X10" R278 25/BNDL 700/PALLET	EA	1.11
13001	BOX CARDBOARD 20" X 14" X 14 R561 20/BNDL 240/PALLET	EA	2.06
06981	CUP COLD 3 OZ 100/PKG 12200 3 OZ REFILL 50/CA SWHRT	PK	4.30
22641	DIRECTED PENMANSHIP I	EA	1.34
22642	DIRECTED PENMANSHIP II	EA	1.41
22643	DIRECTED PENMANSHIP III	EA	1.32
22644	DIRECTED PENMANSHIP IV	EA	1.77
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	18.47
21813	FORM POSTAGE METER CHARGE SLIPS 100 PER PKG.	PK	0.00
21023	FORM PRINT JOB INSTA PRINT pk/ 100	PK	10.36
21025	FORM PRINT JOB SHELTON TURNBUL pk/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	2.89
16136	HAND SANITIZING WIPES 300/TUB	EA	9.60
07755	LABELS POSTAL SCHOOL DIST. 4J PRINTED RETRNR ADDRESS 50/F	PK	1.77
07820	LAMINATING FILM 25" X 500' GLOSS GBC# 3000004 2 ROLLS/BX	BX	23.17
59662	MASK FACE SURGICAL 50/bx	BX	5.00
12055	PAPER BOND 11 X 17 WHITE 5/case 20#	RM	5.57
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	3.51
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	3.75
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	3.49
12318	PAPER BOND 8 1/2 X 11 IVORY 10/case 20#	RM	3.49
12321	PAPER BOND 8 1/2 X 11 ORCHID 10/case 20#	RM	3.42
12324	PAPER BOND 8 1/2 X 11 PINK 10/case 20#	RM	3.45
12327	PAPER BOND 8 1/2 X 11 SALMON 10/case 20#	RM	3.34
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	2.36
12043	PAPER BOND 8 1/2 X 14 WHITE 10/case 20#	RM	3.63
12009	PAPER BOND PRINTED DIST 4J LETTERHEAD 8 1/2 X 11 25% RAG	RM	15.96
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 FY18

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<u>Item No.</u>	<u>Item Description</u>	<u>U/M</u>	<u>Price</u>
13090	PAPER INDEX 8 1/2 X 11 BLUE 10 pkg/case 90#	PK	4.45
13092	PAPER INDEX 8 1/2 X 11 CANARY 10 pkg/case 90#	PK	4.47
13094	PAPER INDEX 8 1/2 X 11 CHERRY 8 pkg/case 90#	PK	4.45
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	4.40
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/	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	3.27
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 FY18

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### Warehouse Delivery Schedule

The 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 Only Mail Deliveries  
Driver: Dave Fleming

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
Sheldon	11:00
Willagillespie	11:15
Buena Vista	11:30
Cal Young	11:50
Gilham	12:10
EEA	12:25

## Financial Procedures for Schools and Departments FY18

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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 Only Deliveries  
Driver: Dave Fleming

School	Approximate Arrival Time
McCornack	9:45 AM
Chavez	10:05 AM
ATA	10:20 AM
Adams	10:35 AM
South	10:55 AM
Roosevelt	11:20 AM
Edison	11:35 AM
Camas Ridge	11:50 AM
Ecco	12:10 PM
Charlamagne	12:35 PM
Edgewood	12:50 PM
Spencer Butte	1:00 PM
Family School	1:20 PM
Twin Oaks	1:35 PM
Natives	1:50 PM
Kennedy	2:05 PM
Churchill	2:15 PM

### Churchill Route

Tuesday/Thursday Office 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

## **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. Below are general guidelines; additional guidance is available on the Nutrition Services website at <http://www.4j.lane.edu/nutrition/wellness/>.

#### **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 fat (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.

## **Financial Procedures for Schools and Departments FY18**

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9<sup>th</sup>-12<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 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” (see definition below).
- 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 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.

9-12<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.
- 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).



## **Financial Procedures for Schools and Departments FY18**

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- 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 (see definition below).

### **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 fat (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.

### **Foods and Beverages of Minimal Nutritional Value**

As defined by the U.S. Department of Agriculture:

- Soda Water—A class of beverages made by absorbing carbon dioxide in potable water. The amount of carbon dioxide used is not less than that which will be absorbed by the beverage at a pressure of one atmosphere and at a temperature of 60 deg. F. It either contains no alcohol or only such alcohol, not in excess of 0.5 percent by weight of the finished beverage, as is contributed by the flavoring ingredient used. No product shall be excluded from this definition because it contains artificial sweeteners or discrete nutrients added to the food such as vitamins, minerals and protein.
- Water Ices—As defined by 21 CFR 135.160 Food and Drug Administration Regulations except that water ices which contain fruit or fruit juices are not included in this definition.
- Chewing Gum—Flavored products from natural or synthetic gums and other ingredients which form an insoluble mass for chewing.
- Certain Candies—Processed foods made predominantly from sweeteners or artificial sweeteners with a variety of minor ingredients which characterize the following types:
  - Hard Candy—A product made predominantly from sugar (sucrose) and corn syrup which may be flavored and colored, is characterized by a hard, brittle texture, and includes such items as sour balls, fruit balls, candy sticks, lollipops, starlight mints, after dinner mints, sugar wafers, rock candy, cinnamon candies, breath mints, jaw breakers and cough drops.
  - Jellies and Gums—A mixture of carbohydrates which are combined to form a stable gelatinous system of jelly-like character, and are generally flavored and colored, and include gum drops, jelly beans, jellied and fruit-flavored slices.
  - Marshmallow Candies—An aerated confection composed as sugar, corn syrup, invert sugar, 20 percent water and gelatin or egg white to which flavors and colors may be added.

## **Financial Procedures for Schools and Departments FY18**

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- Fondant—A product consisting of microscopic-sized sugar crystals which are separated by thin film of sugar and/or invert sugar in solution such as candy corn, soft mints.
- Licorice—A product made predominantly from sugar and corn syrup which is flavored with an extract made from the licorice root.
- Spun Candy—A product that is made from sugar that has been boiled at high temperature and spun at a high speed in a special machine.
- Candy Coated Popcorn—Popcorn which is coated with a mixture made predominantly from sugar and corn syrup.

### **Portion Sizes**

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

## 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.

**Eugene School District**  
200 North Monroe St., Eugene, Oregon • 541-790-7700

FAQS DIRECTORY CALENDARS

Home District » Departments » Schools » Parents » Students » Staff » Hot Topics »

Home » [Financial Services](#) » Financial Services Intranet

**Financial Services Intranet**  
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.

**Procedures and Forms**  
Documents and forms related to Financial Services operations, including the Financial Procedures for Schools and Departments.

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

**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](#)
- [Procedures and Forms](#)
- [Lawson](#)
  - [Lawson Employee Self-Service](#)
  - [Lawson Manager Self Service](#)
  - [Lawson Troubleshooting](#)
  - [Lawson Internet Explorer Configuration](#)
  - [Lawson Requirements](#)
  - [Lawson User Guides and Instructions](#)
- [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.

## Local Wellness Program

### Goals

The Board is committed to providing intellectually stimulating school environments that promote and protect student's health, social and emotional well-being, and ability to learn by supporting healthy eating, physical activity and other behaviors that contribute to student wellness. Good health fosters student attendance and education. Students and adolescents need access to healthful foods and opportunities to be physically active in order to grow, learn, and thrive.

To meet this commitment, the district will be guided by the following policy goals:

1. The health of our students is essential to their academic success. When faced with conflicting priorities or issues of implementation, this policy will be interpreted in a way that favors student health.
2. All students in grades K-12 will have opportunities, support, and encouragement to be physically active on a daily basis.
3. Schools will provide access to a variety of affordable, nutritious, and appealing foods that meet the health and nutrition needs of students; take into consideration the religious, ethnic, and cultural diversity of the student body in meal planning; and provide clean, safe, and pleasant settings and adequate time for students to eat.
4. To the maximum extent practicable, all schools in the district will participate in available federal school meal programs.
5. The school district supports a coordinated approach to school health which includes: comprehensive school health education, physical education, school health services, school nutrition services, counseling, psychological, and social services, healthy school environment, school-site health promotion for staff, and family and community involvement.
6. The district will engage students, parents, teachers, food service professionals, health professionals, and other interested community members in developing, implementing, monitoring, and reviewing district-wide wellness policies.

## **Physical Activity**

### **1. During the School Day**

Physical activity includes regular instructional physical education, co-curricular activities, and recess at the elementary level. Substituting any one of these components for the others is not appropriate. All students will be expected to participate in regular physical activity and will be provided with appropriate opportunities for participation in physical education. The superintendent will establish minimum standards for student participation in physical education and activity and the time line for implementation of those standards. Physical education instruction will be consistent with the state adopted physical education common curriculum goals, content standards and grade level benchmark standards for students. All students will be encouraged to further participate in physical activity through co-curricular activities and recess.

The district will encourage the integration of physical activity with the academic curriculum, based on research findings relating physical activity and learning.

Recognizing the critical importance of sufficient physical activity for students, schools will withhold recess for disciplinary reasons only on an occasional basis as part of an individual or school-wide behavior plan. Physical education will not be withheld as punishment.

### **2. Before and After School Activities**

Students will be encouraged to participate in physical activity through before- and/or after-school programs including intramurals, interscholastic athletics, and physical activity clubs. To encourage broad participation in extra-curricular activities, the district will work with the community and other agencies to reduce barriers to participation and expand opportunities through partnerships with youth activity organizations, scholarships, subsidies, and other methods.

### **3. Parent and Community Support**

Schools will encourage parents and guardians to support their student's participation in physical activity, to be physically active role models, and to include physical activity in family events.

The district will seek ways to make it safer and easier for students to walk or use other non-vehicular modes to travel to and from school. When appropriate, the district will collaborate with other community organizations on initiatives encouraging physical activity.

## **Nutrition Education**

### **1. Fostering Lifelong Healthy Eating Habits**

Students will receive nutrition education that is interactive and teaches the skills they need to adopt lifelong habits of healthy eating. Students will receive consistent nutrition messages throughout schools, classrooms and cafeterias.

## 2. Nutrition Education Curriculum

District curriculum standards and guidelines will include nutrition education. Nutrition education will be consistent with the state adopted health education common curriculum goals, content standards and grade level benchmarks for students. The aim of the curriculum will be for students to acquire knowledge and skills to understand and make healthful nutrition choices that contribute to growth and vitality and help prevent chronic disease. Nutrition education activities should be coordinated with the food service program, the core curriculum and the school health program, as appropriate, and should be enjoyable, developmentally appropriate, culturally relevant, and participatory.

## 3. Community Involvement

Schools will promote family and community involvement in nutrition education, such as developing school gardens and providing students with opportunities to learn about sustainable agriculture and how food is grown in the community.

### **Other Activities That Support Student Wellness**

#### Health Clinics

The district will strive to provide access to School-Based Health Clinics for all students, as fiscally possible.

#### **Nutrition Standards**

Decisions regarding the sale of foods in addition to the National School Breakfast and Lunch Program meals will be based on nutrition goals, not solely revenue.

#### 1. National School Breakfast and Lunch Programs

The district's food service operations will provide nutrient-dense, tasty, food that reflects Eugene's cultural diversity, includes varied daily vegetarian options and offers a variety of fruits and vegetables. The Superintendent will set nutrition standards that meet or exceed those set by the National School Breakfast and Lunch programs.

To the extent possible, the district will operate the National School Breakfast Program in all schools and employ strategies that encourage participation in the program.

The district will look for opportunities to integrate local, organic foods into the meals served to students by the district, based on availability, acceptability and price.

Recognizing the importance of sufficient time to eat and of a pleasant, relaxed eating environment, schools will adopt a minimum number of minutes that students have to eat breakfast and lunch and will consider other strategies, such as recess before lunch, that contribute to healthy eating.

## 2. Competitive Foods

Competitive foods include a la carte, fundraising, school stores, classroom parties, foods used during classes as part of the learning process, vending machines and anything that competes with breakfast and lunch programs.

Competitive foods shall meet nutrition and portion size guidelines set by the Superintendent, with input from the Wellness Advisory Committee.

The Superintendent will develop "Healthy Snacks" and "Healthy Parties" nutrition guidelines as part of the administrative rules and provide parents and teachers with a list of examples of healthy, affordable food choices for snacks and parties.

### a. Sale of Competitive Foods

Foods of Minimal Nutritional Value, as defined by the U. S. Department of Agriculture, shall not be sold to students on school campuses during the school day.

The Board supports an economically self-sustaining, high quality food services program. To this end, no competitive foods that are not under the direct control of district food services operations shall be sold during the school breakfast and lunch service times.

#### 1) A La Carte

In addition to reimbursable meals, the district food service operation sells food a la carte. A la carte offerings shall be selected with the goal of offering predominantly high quality, nutritious food.

#### 2) Fundraising/School Stores

The district encourages fundraising activities that promote physical activity and provide healthy food and beverage options. Food sold at school as a fund-raiser during the school day will meet the Healthy Snacks and Healthy Party guidelines

#### 3) Vending Machines

Vending machines accessible to students on school campuses shall include only nutritious food options that meet the Healthy Snacks guidelines. The district will use strategies to promote healthy food choices such as setting lower prices for healthier options, and offering a high percentage of nutritious food options.

b. Distribution of Competitive Foods

1) Celebrations

Soda water, as defined by the U.S. Department of Agriculture, will not be distributed during the school day as part of a celebration or school party. Nutritious foods are encouraged when used as part of a social or cultural event in the schools. During the school day, schools should limit the use of food at celebrations that are not related to the curriculum. Parents and staff are encouraged to provide party foods that are consistent with the Healthy Parties guidelines and to serve such items after the lunch hour whenever possible.

2) Use of Food as Incentive or Reward

Foods of Minimal Nutritional Value, as defined by the U.S. Department of Agriculture, will not be distributed by staff as a reward for academic performance or good behavior. The use of any candy as a reward for academic performance or good behavior is strongly discouraged. Other food as an incentive, or reward, or as part of the curriculum for students should be used judiciously, taking into consideration the nutritional value of the food being served and the frequency of use.

3. After-School Events Sponsored by District

Food offerings at concession stands operated on school campuses (such as, but not limited to, athletic events and concessions, after school programs, performances and school dances) shall include healthy options such as water, milk, 100 percent juice and nutritious foods as delineated by the Healthy Snacks guidelines.

**Policy Implementation**

The Superintendent is responsible for implementation of this Wellness Policy. To assist in this effort, the superintendent will appoint a Wellness Advisory Committee consisting of two parents, two community members including one health care or nutrition professional, two students, one principal, one teacher, one food services employee, and one Board member. Each of the employee groups may appoint one ex officio member. The committee will advise the Superintendent on the development of administrative rules related to this policy and provide guidance on implementation of the policy. The committee will also advise the Superintendent on responding to scientific findings related to student nutrition and wellness.

END OF POLICY

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**Legal Reference(s):**

[ORS 332.107](#)  
[ORS 336.423](#)

[OAR 581-051-0100](#)  
[OAR 581-051-0305](#)

[OAR 581-051-0310](#)  
[OAR 581-051-0400](#)

National School Lunch Program, 7 C.F.R. Part 210 (2006).

School Breakfast Program, 7 C.F.R. Part 220 (2006).

Child Nutrition and WIC Reauthorization Act of 2004 § 204, 42 U.S.C. § 1751 (2006).



# 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	

### **Discipline of Students with Disabilities\*\***

When considering student disciplinary procedures that may result in removal of the student, the district follows all special education procedures and ensures the parent and the student are afforded the procedural safeguards of the Individuals with Disabilities Education Act (IDEA) if:

1. The student is receiving IEP services;
2. For the student not yet identified as a student with a disability, the district had knowledge that the student had a disability and needed special education.

For a violation of a code of conduct, the district may remove a student with a disability from a current educational placement to an appropriate interim alternative educational setting, another setting, or suspension, for up to 10 school days in a school year to the same extent, and with the same notice, as for students without disabilities, if the removals do not constitute a pattern. The district may remove a student with disabilities for additional periods of up to 10 days if the removals do not constitute a pattern. The determination regarding whether a series of removals constitutes a pattern is subject to review in an expedited due process hearing.

Disciplinary removal of a student with a disability constitutes a change in the student's educational placement when the removal is for more than 10 consecutive school days, or the removal is for more than 10 cumulative school days and constitutes a pattern of removals. When considering whether to order a disciplinary change of placement the district may consider any unique circumstances on a case-by-case basis. Any decision to initiate a disciplinary change in placement requires a determination of whether the conduct leading to the disciplinary removal was caused by, or was substantially related to, the student's disability or was a direct result of the district's failure to implement the student's IEP.

For a violation involving drugs, weapons or the infliction of serious bodily injury, the district may remove a student with a disability from the student's current educational placement to an appropriate interim alternative educational setting for the same amount of time that a student without a disability would be subject to discipline, but for not more than 45 school days in a school year without regard to whether the behavior is a manifestation of the student's disability. This removal is considered a change in placement.

The district will provide educational services to a student who is suspended or expelled for more than 10 school days in a school year. These services may be provided in a different location or interim alternative educational setting as determined by the IEP and placement teams.

END OF POLICY



**Legal Reference(s):**

[ORS 326.565](#)

[ORS 326.575](#)

[ORS 336.187](#)

[ORS 339.240](#)

[ORS 339.250](#)

[ORS 339.252](#)

[ORS 339.260](#)

[ORS 343.177](#)

[OAR 581-015-2400](#)

[OAR 581-015-2405](#)

[OAR 581-015-2410](#)

[OAR 581-015-2415](#)

[OAR 581-015-2420](#)

[OAR 581-015-2425](#)

[OAR 581-015-2430](#)

[OAR 581-015-2435](#)

[OAR 581-015-2440](#)

Individuals with Disabilities Education Act (IDEA, 20 U.S.C. § 1415 (k) (2006).

Assistance to States for the Education of Children with Disabilities, 34 CFR § 300.507 and § 300.508(a)-(c); §§ 300.510 - 300.514; §§ 300.530 - 300.536.

Student Rights &  
Responsibilities  
Handbook  
**2016 Revision**



**Eugene School District 4J**

**Investing in Students  
Creating the Future**



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Message from the Superintendent To All Students and Their Parents or Guardians

All students in Eugene School District 4J have the right to learn and grow in a safe and welcoming school environment. School staff, students and their parents and guardians have a joint responsibility for maintaining a positive learning environment and appropriate student conduct and discipline.

This Student Rights & Responsibilities Handbook addresses certain rights and responsibilities of students and expectations for student conduct necessary to maintain a climate of respect and safety. The handbook represents a set of guidelines; it does not describe all behaviors or detail the many steps schools take to assist students in making good decisions.

Individual schools may also establish specific school rules to help provide a safe and effective learning environment and to implement district policies and laws. No school, however, has the authority to modify district rules.

Students and parents, please carefully read and discuss this handbook and keep it for future reference. Working together, 4J students, staff and families can create safe and positive learning environments for all.

Gustavo Balderas, Superintendent  
Eugene School District 4J  
200 North Monroe Street  
Eugene, Oregon 97402-4295  
www.4j.lane.edu

For additional information and/or compliance issues:  
Superintendent’s Office, 541-790-7706  
Title IX, 541-790-7550  
Section 504, 541-790-7800

Revised July 2016  
Issued by Lane County School District No. 4J, Eugene, Oregon



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## Admission

*Schools shall admit free of charge students between ages 5 and 21 who reside within the school district unless they have received a high school diploma or have been expelled from another school district as specified below.*

### Age of Enrollment

A child entering school for the first time shall be considered to be 5 years of age if his or her fifth birthday occurs on or before September 1. Children who are at least 5 years old by Sept. 1 of the school year may enroll in kindergarten; early admission may be requested for children with a birthday later in September. Children who are 6 years old by Sept. 1 of the school year may enroll in first grade. Students who seek to enroll in the school district after their 19th birthday may be required to attend an alternative school program.

### Residency

To enroll in a 4J school or participate in the school choice process as a district resident, a student must reside with a parent or guardian within the district boundary more than 50 percent of the time. At the time of registration, parents or guardians must present acceptable documentation demonstrating that they reside within the district. If, at any time, a student's residence is in question, the district may require additional evidence to verify residence. When documents submitted are falsified and such a violation is found, the child will be sent back to the school that he or she should properly be attending. Families who live outside of the district but wish to attend a 4J school may request a transfer to the district.

### Enrollment of Expelled Students

The district may deny regular school admission to a student who is expelled from another school district and who subsequently becomes a resident of the district or who applies for admission to the district as a nonresident student. In order to determine whether or not a student may be allowed regular school admission and under what conditions, a review of the expulsion will be conducted by a district hearing officer, following district expulsion procedures. The hearing officer will inform a student who becomes a resident of the district and the student's parents about the availability of alternative education programs, if the student's admission is denied because he or she has been expelled from another school district.

If a student is under expulsion from another school district for an offense that constitutes a violation of the school district policy's firearms policy adopted pursuant to law, the district may deny admission to the regular school program for at least the period of the expulsion and one calendar year from the date of the expulsion.

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## Attendance

*Oregon law requires that all children between the ages of 6 and 18 years of age who have not completed the 12th grade regularly attend a public full-time school (ORS 339.010). Children who are 5 years of age who have been enrolled in a public school are required to regularly attend while enrolled. Oregon law requires that the district withdraw students who are absent ten (10) consecutive school days.*

There is a strong correlation between school attendance and student learning. In order to be successful academically, students must actively participate in their learning. To this end, efforts will be made by school officials to enforce the compulsory attendance laws of the state. The district will provide homeless students with services comparable to services offered to all 4J students, including transportation services.

## Expectations

Students are expected to regularly attend and be punctual in reporting to classes. A school administrator may excuse an absence caused by the student's illness, the illness of a student's family member, or an emergency. In most cases, absences of this type will be excused if parents or guardians contact the school within 48 hours. The principal may also excuse absences for other reasons where satisfactory arrangements are made in advance. The school will notify parents or guardians by the end of the day when there is an unplanned absence.

State law requires parents and guardians to send students to, and maintain regular attendance in, school. Eight half-day unexcused absences or four full-day unexcused absences in any four-week period during which the school is in session is considered irregular attendance. Chronic lateness and single-period absences may also be considered. Failure to send a student to school is a Class C violation, and may result in a court-imposed fine (ORS 339.990). In cases of irregular attendance, a principal may determine if an absence is excused. The school will notify parents or guardians with concerns about irregular attendance. Nonattendance notices will be sent as required by law.

### Relationship of Attendance to Grades and Credit

Punctual and regular attendance is essential to academic success. At the beginning of each course, teachers will communicate to students and parents how attendance and class participation are related to the instructional goals of the subject or course.

A lower grade may result from a student's failure to meet course goals because of absences or a failure to complete makeup assignments. However, grades may not be reduced, nor credit denied, based solely on attendance. Additionally, grades may not be reduced nor credit denied based on absences due to religious reasons; manifestation of a student's documented disability; or an absence that is excused under district attendance policy. Due process (a student's right to fair treatment) will be provided to any student whose grade is reduced or credit denied for attendance rather than for demonstrated proficiency in content knowledge, academic skills and intellectual habits.

### Relationship of Attendance to Extracurricular Activities

Students may be ineligible to participate in extracurricular activity programs if they are absent from one or more classes on the day of the activity, unless the absences are school-related or prior arrangements have been made with a school administrator. Emergency situations may be reviewed and determined by the athletic director or athletic/activities coordinator. Irregular school attendance may also result in suspension from extracurricular activities.

### Relationship of Attendance to Student Driving Privileges

The superintendent may file with the Oregon Department of Transportation a written notice of a student's withdrawal from high school through truancy. A student is withdrawn from school after 10 consecutive absences or 10 days total of unexcused absences during a single trimester. The superintendent or designee will meet with the parent or guardian of the student before submitting such notice. Upon receipt of the notice, the Oregon Department of Transportation may then suspend the person's driving privileges or application for driving privileges. (ORS 339.257; district policies JEA and JHFDA)

### Exemptions from Compulsory Attendance

There are several exemptions to the compulsory attendance law (ORS 339.030), including for children: (1) being taught in a private or parochial school in the courses of study usually taught in kindergarten through grade 12 in the public schools and in attendance for a period equivalent to that required of children attending public schools; (2)



proving to the satisfaction of the school board or designee that they have acquired equivalent knowledge to that acquired in the courses of study taught in kindergarten through grade 12 in the public schools; (3) who have received a high school diploma; (4) being taught for a period equivalent to that required of children attending public schools by a private teacher the courses of study usually taught in kindergarten through grade 12 in the public schools; or (5) being home schooled having registered with the Lane Education Service District.

An exemption also may be granted to: (1) the parent or guardian of a 16- or 17-year-old child who is lawfully employed full-time or lawfully employed part-time and enrolled in school, a community college or alternative education program, or (2) a child who is an emancipated minor or who has initiated the procedure for emancipation.

Reference: ORS Chapter 339

### Alternative Education Options

Oregon law requires that in certain circumstances school districts inform students and parents of alternative education options that might be available to them. School districts are also required to inform students and parents of those alternative education programs for which they will provide financial support.

The school administration will inform students and parents or guardians about the availability of appropriate and accessible alternative education programs in each of the following situations:

- a. Upon the occurrence of a second or any subsequent occurrence of a disciplinary problem within a three-year period that would justify a recommendation for expulsion;
- b. When a student’s attendance pattern is so erratic that, in the district’s opinion, the student is not benefiting from the educational program;
- c. When the school is considering expulsion as a disciplinary alternative;
- d. When a student is expelled; or
- e. When an emancipated minor, parent or legal guardian applies for the student’s exemption from compulsory attendance under law (ORS 339.030(5)).

The notice will include the student action that is the basis for consideration of alternative education, a list of the alternative education programs for which the district would provide financial support, the program recommended considering the student’s learning styles and needs, and the procedures for enrolling the student in the recommended program.

Reference: Board Policy IGBHC; OAR 581-021-0071

### Assembly of Students

Students have the right to assemble peaceably. Gatherings that interfere with the operation of the school are prohibited. Students and staff all share responsibility for the activities that take place in school. School personnel are held accountable to the general public and, in cooperation with students, are accountable for the image of the institution. Therefore, the orderly use of school facilities is required.

### Informal Gatherings

Students have the right to gather informally, but such gatherings shall not substantially disrupt the orderly operation of the school or infringe upon the rights of others.

### Student Meetings

Students are permitted to hold meetings at school under the following conditions:

- a. Meetings must be scheduled in advance with school officials and be sponsored by an official school club or organization. The time and place of the meetings shall not interfere with the school program.
- b. If a large crowd is anticipated, a crowd control plan must be filed with the school official in advance of the meeting.
- c. Meetings must not be disruptive to class or school activities and shall not be of such a nature that could likely result in damage to any person or property.

### Speakers

Authorization for the presence in the building of outside speakers must be obtained from the principal in advance of the meeting. No speaker will be allowed to make a speech that advocates breaking the law or otherwise violates the district’s policies or the provisions of this handbook.

### Student Walkouts

Student-organized “skip days” or other unauthorized group absences of students are not acceptable. Permission for absences for this type of activity will not be granted.

### Bullying, Harassment and Intimidation

School board policy JB prohibits harassment, intimidation, hazing, bullying, cyberbullying, teen dating violence and retaliation, as defined by school board policy, against students on or immediately adjacent to school grounds, at any school-sponsored activity, including athletic activities, on school-provided transportation or at any official school bus stop. Students may face disciplinary consequences for any off-campus behavior that would disrupt the educational process or the operation of the school or district.

### Definitions

- a. **Bullying, harassment or intimidation** means any act that substantially interferes with a student’s educational benefits, opportunities or performance; that takes place on or immediately adjacent to school grounds, at any school-sponsored activity, on school-sponsored transportation, or at any official school bus stop; and that 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.
- It may be based on, but is not limited to, the protected class status of a person.
- b. **Cyberbullying** is the use of any electronic communication device to harass, intimidate or bully.
- c. **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.

- d. 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.
- e. Protected class** means a group of persons distinguished or perceived to be distinguished by disability, race, color, national origin, ethnicity, sex, sexual orientation, gender identity or expression, age, religion, marital status, socioeconomic status, source of income, cultural background, familial status, physical characteristic, or linguistic characteristics of a national origin group.
- f. 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.
- g. Retaliation** means acts of reprisal, intimidation, or harassment toward a person in response to previously reported harassment.

### Student Responsibility

Students are expected to refrain from harassment, intimidation, bullying; sexual harassment; cyberbullying; hazing; teen dating violence; or retaliation. Students who violate these rules may be disciplined.

Students are expected to hold their peers to the standards established by policy and this handbook, and are encouraged to bring violations to the attention of a teacher, counselor, administrator or other staff member. These reports may be made anonymously.

### Reports and Complaint Process

The district is committed to preventing and responding to incidents of bullying, harassment, intimidation, cyberbullying, sexual harassment, hazing, teen dating violence or retaliation. Staff and volunteers will follow school board policy requiring that such incidents be reported to the school administrator, or to the superintendent where the administrator is believed to have been involved.

Students and parents who have experienced an incident of bullying, harassment, intimidation, cyberbullying, hazing, teen dating violence or retaliation are strongly encouraged to contact the school principal or other staff member to report it. If the administrator is believed to be involved, the report may instead be made to the superintendent's office.

Administration will respond quickly and appropriately to investigate and resolve such reports, making effort to provide the student with a practical, safe, private and age-appropriate way to discuss the matter. Interim measures necessary to provide a safe educational environment may be considered. When reports are substantiated, administration will take sufficient measures to remediate and prevent recurrences. Examples include: Support from counseling and/or administration to address the needs of the victim; support, interventions or consequences to address

the behavior of the perpetrator; and safety plans where appropriate. Parents will be notified in a timely manner, within the constraints of laws governing the confidentiality of student records.

If students and parents cannot resolve the issue working with the school administrator or staff, they may submit a complaint to the superintendent's office. The form, and the district publication Bullying, harassment & discrimination: Step-by-step complaint process, is available from school offices or from the superintendent's office at the 4J Education Center, 200 North Monroe Street, Eugene, OR 97402, 541-790-7706.

### Child Abuse

*Oregon law requires all public employees to report possible child abuse to Department of Human Services or a law enforcement agency.*

#### Reporting Child Abuse

Any school employee having reasonable cause to believe that any child with whom he or she comes in contact, on or off the job, has suffered abuse, or that any adult with whom he or she comes in contact has abused a child, shall report immediately to the State of Oregon's Department of Human Services – Child Protective Services, or to a law enforcement agency. Staff members may not inform parents of such reports.

#### Investigations of Child Abuse

School staff will cooperate with investigations of possible child abuse being conducted by Department of Human Services (DHS) or a law enforcement agency. A DHS staff member or a law enforcement officer who is questioning a student in regard to child abuse will determine if a school official may be present in an interview that occurs at school.

### Cooperation with Law Enforcement Agencies

*School officials have a dual responsibility. They must safeguard the rights of students, and even represent students in certain situations. They also must cooperate with law enforcement officers in the legitimate pursuit of their duties.*

#### Investigations by Law Enforcement Officers

Police officers investigating a case involving an illegal act in which a student may be involved, or about which the student may have information, shall contact the building principal, or her or his designee, before any effort is made to question a student during school hours.

#### Contacting Parents

**a. Investigations related to illegal acts that occur off-campus and are not school-related:** The principal, or her or his designee, will make a reasonable effort to contact the parent or guardian when an officer comes to question or arrest a student related to illegal acts that occur off-campus and that are not school-related, unless there is reason to believe that such notification would unduly interfere with the investigation or that the matter pertains to alleged child abuse. If the principal or designee is unable to reach the parent or guardian the officer should not be delayed further. However, a school official should contact the parent or guardian as soon as possible.

**b. Investigations related to violations of school policies and rules:** The principal, or her or his designee, may involve a police officer in investigating violations of school policies and rules, including student interviews, without first contacting the parent. However, if during the investigation a student becomes a focal suspect to an illegal act,



then it is the responsibility of the principal or designee to make a reasonable effort to contact the parent or guardian before allowing an officer to proceed with an interview.

**Questioning of Students**

The police officer will observe all the procedural safeguards prescribed by law and her or his agency when questioning a student. An administrator, or designee, will always be present when a student is being questioned, unless the issue pertains to child abuse.

**Taking a Student from the School**

The school administrator or designee will not let a police officer or a Department of Human Services official take a student from a school building without a court order, an arrest, protective custody from DHS, or permission of the parent or guardian.

**Dress and Grooming**

The responsibility for dress and grooming of a student rests primarily with the student and his or her parents or guardians. A student’s dress or grooming should not affect participation in the educational program or school-related activities. Students may be directed to change dress or grooming when in violation of the rules below.

Student dress and grooming may not interfere with or disrupt the educational environment of the student or others. Examples of clothing likely to disrupt the educational environment include clothing with language or symbols that are vulgar and plainly offensive, obscene or sexually explicit, racially divisive, drug-, alcohol- or tobacco-related, or indicative of gang activity or affiliation.

Student dress and grooming may not threaten the health or safety of the student or others. For example, students must wear shoes while on school property or during school-sponsored activities.

Schools may impose additional dress code requirements. Provisions for dress and grooming for special activities should arise directly out of the needs of the activity.

Students have the right to dress in accordance with their gender identity. District schools are also committed to accommodating students who need an exception to the dress code for religious reasons.

Questions regarding rights and responsibilities related to dress and grooming should be directed to the building principal. If an issue is not resolved at the building level, the parent or guardian may contact the elementary or secondary education director, assistant superintendent or superintendent.

**Extracurricular and Athletic Activity Participation**

*These rules pertain to high school students who participate in district-sponsored extracurricular activities and athletic programs.*

**General Participation Rules**

- a. Students who participate in district-sponsored sports must have a physical examination prior to any participation, including tryouts and practices, and must be re-examined every two years. A non-expired physical must be on file throughout the season and may not expire during the season.

- b. In all extracurricular activity and athletic programs, students will ride to and from the activity in school vehicles unless otherwise arranged by the principal or designee.

- c. Students will be personally responsible for all school equipment issued and will return the equipment on time and in good condition. Students are responsible to pay for lost, stolen or damaged equipment at replacement cost. A student who fails to return and/or pay for lost, stolen or damaged equipment will not be eligible to compete in any subsequent sport or activity until such time that payment or arrangements for payment have been made with the appropriate building administrator. Should the agreed plan not be followed, the student will become ineligible at that point.

- d. Students may be ineligible to participate in extracurricular activities and athletic programs if they are absent from one or more classes on the day of the activity unless the absences are school-related or prior arrangements have been made with the school administrator. Emergency situations may be reviewed and determined by the athletic director or athletic/activities coordinator. Irregular attendance may also result in suspension from the extracurricular activity.

- e. Students participating in an athletic program who quit or fail to keep program commitments may not participate in pre-season activities or practices for another sport unless the administrator has given approval.

- f. To be scholastically eligible for extracurricular activities, a student must be making satisfactory progress toward graduation requirements, as determined by the school administration or designee. A student must be enrolled in and passing 2.0 credits during the trimester the sport is in session as well as the previous trimester. The specific credit requirement for eligibility is defined in the Oregon School Activities Association Handbook.

**Consequences for Substance Abuse**

The possession or use of tobacco, inhalants, alcohol, illegal substances or non-prescribed drugs is prohibited. These rules are in effect from the first day an athlete or extracurricular activity participant signs the school rule form with the intent to participate and remain in effect throughout the student’s entire high school career, unless changed by the district with notice to the student. It is in effect 24 hours a day, from the first day of OSAA designated fall season practices until the final day of the school year.

Student athletes and extracurricular activity participants in violation of this rule, whether or not the violation is at a school-sponsored activity, are subject to the consequences listed below which are in addition to any school consequences that may apply:

**First Offense:** The student will be suspended from participation in all interscholastic athletic competition for three weeks. At the discretion of the administrator, the student may be allowed to attend practice sessions for the duration of the suspension. The student will be placed on probation for one year following the completion of the three-week suspension.

**Second Offense:** Any violation following the first offense during the probationary period is considered a second offense. The student will be suspended from participation in all extracurricular activity programs for six weeks. A new one-year probation period will begin following the completion of the six-week suspension.

### Serving Suspensions and Probation:

- a. Suspensions of an athlete who is currently participating in a sport will start on the date the athlete is notified of the suspension. If the determination of an offense is made prior to the first contest of the season, the suspension will begin with the first contest.
- b. An athlete suspended while out of season will begin the suspension on the first regularly scheduled contest of the next season in which the athlete participates.
- c. Suspensions will be served in their entirety. Should a suspension start at or near the end of a season, the balance of the suspension will be served starting with the first regularly scheduled contest of the athlete's next season of participation in a sport.
- d. Probationary periods begin immediately after the suspension is served.

### Freedom of Expression

*Students have the right to free expression under the Constitutions of the United States and the State of Oregon. Students are entitled to express their personal opinions under all reasonable circumstances, but student expression shall not interfere with the freedom of others to express themselves nor substantially disrupt the orderly conduct of the school. The use of vulgar and plainly offensive, obscene or sexually explicit language undermines one of the school district's basic missions.*

### School Publications

Students are encouraged to participate in the production of school publications. Any publication which is in any way sponsored or funded by the school is a school publication. Students may express personal opinions in these publications but shall adhere to the written editorial policies of the school. A school newspaper should reflect the life of the school community. Those students responsible for the publication of a school newspaper must be mindful of this responsibility to the school community. Vulgar and plainly offensive, obscene or sexually explicit material; knowing or reckless false or libelous statements; any material that would substantially disrupt classes or other school activities; and any material that is inconsistent with the school's basic educational mission are prohibited from all school publications.

### Distribution of Materials

- a. **Rights and Responsibilities:** Students have the right to distribute and receive written material from each other. This right, however, also carries responsibilities. Students shall not distribute or display materials that are knowingly or recklessly false or defamatory; are vulgar and plainly offensive, obscene or sexually explicit; tend to create an immediate danger or disruption to the orderly operation of school; or urge the violation of the law, district policies, existing attendance regulations or the provisions of this handbook. Materials to be distributed or posted within the school must identify the source of the printed material. Materials that students choose to distribute may not falsely identify school endorsement or sponsorship.
- b. **Commercial and Fund-Raising Activities:** Students shall not distribute or display announcements or advertisements of a commercial nature, sell materials, or engage in activities to solicit financial contributions without the prior authorization of school officials.
- c. **Time and Place of Distribution:** School officials may designate the time and place for distribution of written information and related materials so that the activity does not materially interfere with the school program. Local school rules may limit the time of distribution of material, including the circulation of petitions, to periods before school begins, after dismissal and during lunch time, when such limi-

tation is necessary to prevent interference with the school program. The local school rules may define where distribution of material and circulation of petitions may take place so as to permit the normal flow of traffic within the school.

- d. **Student Display Areas:** Each secondary school will provide at least one student display area of reasonable size and prescribe methods to inform students of the board policy and school guidelines for the distribution of literature and the display of material.

### Participation in Patriotic Exercises

Students may choose not to participate in patriotic exercises, but also have the responsibility to ensure the manner of their nonparticipation does not deny other students their rights to participate or disrupt the educational process.

### Objection to Instructional Materials

If a student objects on religious or ethical grounds to reading, studying, or discussing any instructional material, the teacher will supply alternative materials without prejudice to the student.

### Prohibited Speech

The use or display of vulgar and plainly offensive, obscene or sexually explicit language; threats of harm to persons or property; or language that creates or threatens to create an immediate danger of disruption to the orderly operation of the school or violation of the law, district policies, attendance regulations or the provisions of this handbook is prohibited.

### Freedom of Religion

*The Constitutions of the United States and the State of Oregon require the public schools to take a neutral position concerning religion. Public schools cannot aid one religion or all religions or prefer believers to nonbelievers. However, schools may provide instructional activities relating to historical and cultural aspects of religion under the following circumstances: (1) The activity must reflect a clearly secular (nonreligious) purpose. (2) The activity must have a primary effect that neither advances nor inhibits religion. (3) The activity does not create an excessive entanglement with religion.*

### Student Religious Meetings and Discussions

If school principals permit other noncurriculum student meetings or discussions on the school premises during noninstructional time, religious meetings of students that are voluntary and student-initiated will also be permitted. Prior arrangements for such meetings must be made by contacting the school principal. Employees and nonschool persons are prohibited from directing, conducting, controlling or participating in the activities of such student groups. Except as provided in school board policy for the leasing of school facilities by religious groups, non-students may not meet with students on school premises for any type of religious activity. A faculty monitor may attend meetings for custodial purposes and to provide general supervision, but may not participate nor advise students about their activities.

### Release Time for Religious Instruction

Elementary students may be excused from school for up to two hours in any week and secondary students may be excused from school for up to five hours in any week to attend weekday schools giving religious instruction. A written request must be signed by the parent or guardian before the student is released.

Religious teachers or organizations are not permitted to promote stu-





dent participation by directly contacting students on school grounds or by asking students who participate in their programs to recruit students who remain at school. All promotional activities will be conducted away from school.

**Gang Activity**

*The presence of members of gangs and gang activities on campus or at off-campus, school-sponsored activities is likely to cause a substantial disruption or material interference with school and school activities. A “gang” is defined as a group that identifies itself through the use of a name, unique appearance or language, including hand signs, the claiming of geographical territory or the espousing of a distinctive belief system that frequently results in criminal activity. (ORS 336.109 (2)).*

The following activities are prohibited at school or school-related activities:

- a. No student shall wear or display clothing or other objects that are commonly considered evidence of membership or affiliation with any gang. These expressions substantially disrupt the educational program by creating a hostile and intimidating environment for students and staff. Schools should consult their school resource officer and the district’s equity coordinator when restricting gang expression.
- b. No student shall commit any act, or use any speech, verbal or nonverbal, showing membership in, or affiliation with, a gang. For example, students may not demonstrate intimidating and/or violent behavior, or use gang signs or graffiti. Students are expected to refrain from using gang-related phrases.
- c. No student shall commit any act that furthers gangs or gang activity including, but not limited to, wearing garb or displaying symbols directly associated with affiliation of a known local gang, soliciting others for membership in any gangs or inciting other students to act with physical violence upon any other person. Such acts are presumed to undermine the school’s basic mission and will create an immediate danger to the orderly operation of the school.

**Nondiscrimination**

Eugene School District 4J policy AC prohibits discrimination or harassment in educational programs, activities, services or employment on the basis of the person’s actual or perceived protected class status, including disability, race, color, national origin, ethnicity, sex, sexual orientation, gender identity or expression, age, religion, marital status, socioeconomic status, source of income, cultural background, familial status, physical characteristics, or linguistic characteristics of a national origin group.

It is a violation of district policy for any student or employee to discriminate against a student or employee, or to harass a student or employee, based on the student or employee’s actual or perceived protected class status.

The district expects that staff, volunteers and students will provide equal treatment and access to educational programs, services and aid to students without regard to their protected status.

The district will investigate all complaints—formal or informal—of discrimination or harassment of a student or employee based on a student or employee’s actual or perceived protected status, and will take appropriate

corrective, remedial, and disciplinary measures for substantiated violations of this policy.

For prompt and equitable resolution of student complaints alleging discrimination and harassment based on protected status, parents and students are urged to contact the school principal or, if they believe the principal is involved or has not resolved the matter, the superintendent’s office. Employees who witness or reasonably suspect discrimination or harassment must report the matter to the school administrator or to the superintendent’s office.

For more information about student complaints, please refer to the district publication Bullying, harassment & discrimination: Step-by-step complaint process, available from school offices or the superintendent’s office.

The district complies with all applicable state and federal laws and regulations, including Title VI, Title IX, Americans with Disabilities Act, Section 504 of the Rehabilitation Act of 1973, and Oregon law. Please contact the superintendent’s office for any questions pertaining to district compliance.

**Superintendent’s Office** — 541-790-7707  
**Title IX Coordinator, Jeff Johnson** — 541-790-7559  
**504 Coordinator, Dr. Cheryl Linder** — 541-790-7800

**Search and Seizure**

*Schools have a responsibility to protect students from harm, maintain order and fulfill their educational mission. Students have a legitimate expectation of privacy, which is protected by the U.S. and Oregon Constitutions. Balancing these concerns, school officials may conduct searches of students or their belongings only under certain circumstances.*

**Student Searches**

School officials may search a student and his or her personal property, or any district property used by the student, if the officials have reasonable suspicion to believe that the student in question violated a school rule or law and that a search will turn up evidence of the violation of the rule or law. The search will be reasonable in scope, meaning reasonably related to the objectives of the search, and not excessively intrusive in light of the age, sex and maturity of the student and the nature of the infraction.

A search may also be conducted in exigent or emergency circumstances, even without individualized suspicion, when the immediate safety of the school or student(s) is at risk. Officials may also conduct a search when the student or the student’s parent consents.

The student will be given the opportunity to be present when the search of personal possessions is conducted, providing the student is in attendance and if there is no reason to believe that his or her presence would endanger his or her safety or the safety of others. Any search of a student’s person will be conducted in the privacy of a school office except in an emergency where delay might endanger the welfare of other persons.

**Seizure of Property**

School officials will seize illegal items, stolen property, evidence of commission of a crime or violation of school policy, or other possessions reasonably determined by school authorities to be a threat to the safety or security of students or others. Such items include but are not limited to guns, other dangerous weapons, illegal drugs and drug paraphernalia. Other items that may be used to substantially disrupt or materially

interfere with the education process may be temporarily removed from the student's possession.

Dangerous weapons, including guns, knives, metal knuckles or any other weapon, the purpose of which is to injure other persons or property, will be promptly turned over to a representative of the appropriate law enforcement agency. Parents will be notified whenever such an item is removed from a student's possession, unless the notification will unduly interfere with the investigation of the law enforcement agency.

#### Use of Lockers and Desks

**a. Assignment of Lockers and Desks:** Lockers and desks belong to the school district and are assigned for the convenience of students. They are to be properly cared for by students and not used for the storage of illegal or dangerous items, items prohibited by this handbook, or evidence of an illegal act or violation of a school rule.

**b. General Inspections of Lockers and Desks:** A general inspection of lockers or desks may be conducted by school officials at any time without prior notice. Such inspections may be conducted to ensure proper sanitation, check mechanical condition and safety, reclaim property belonging to the district, or detect drugs, weapons, contraband, or other violation of law or school rules. Items belonging to the school district and not appropriately in the student's possession will be seized and returned. Illegal or dangerous items, or items prohibited by this handbook, will be seized and held for appropriate disposition. Students will be notified of any items seized.

**c. Special Inspections of Individual Student Lockers or Desks:** Special inspections of individual lockers or desks may be made when there is reasonable suspicion to believe that they contain items that are illegal, dangerous, or evidence of a violation of the law or school rules. It is recommended that the student be given the opportunity to be present when the search is conducted, if the student is in attendance and if there is no reason to believe that the student's presence would endanger the safety of the student or others.

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#### Student Conduct: Offenses

*Students are required to maintain high standards of academic and personal behavior, not only in accordance with the rights and responsibilities set forth in this handbook, but with respect toward other students, staff members and private and public property. Oregon law requires students to comply with the written rules of the school district, to pursue the prescribed course of study, to submit to the lawful authority of staff and to conduct themselves in an orderly fashion.*

*Students will be subject to discipline, up to and including suspension or expulsion, for misconduct that violates federal, state, county or city laws or the policies and rules established by the school district, including but not limited to harassment or discrimination, theft, disruption of school, damage or destruction of school property, damage or destruction of private property, assault or threats of harm, unauthorized use of weapons or dangerous instruments, unlawful use of drugs, narcotics or alcoholic beverages, and persistent failure to comply with rules or the lawful directions of teachers or school officials.*

#### Violation of the District's Bullying and Discrimination Policies

Students shall refrain from bullying, harassment or discrimination including by words or actions based on another person's actual or perceived disability, race, color, national origin, ethnicity, sex, sexual

orientation, gender identity or expression, age, religion, marital status, socioeconomic status, source of income, cultural background, familial status, physical characteristic, or linguistic characteristics of a national origin group. Students shall also comply with the district's bullying and nondiscrimination policies, which are outlined in this handbook.

#### Theft and Stolen Property

No student shall steal or attempt to steal school property or private property while on school property or during a school activity, function or event that occurs off school property. No student shall have stolen property in his or her possession. Stealing means taking or withholding someone else's property without permission, or by extorting or by deception. If a student finds property not belonging to him or her and keeps it for his or her own use instead of delivering it to school staff, that is also considered theft and serious misconduct.

#### Substantial Disruption of School or School Activities

Any conduct that substantially disrupts or threatens to substantially disrupt school activity is forbidden. Willful disobedience, open defiance of a staff member's authority, threats of harm to persons or property, harassment or discrimination prohibited by school rules, including racial and sexual harassment, or language that creates an immediate danger of disruption to the orderly operation of the school or creates a clear and present danger of violation of the law or attendance regulations are prohibited.

#### Willful Disobedience of a Staff Member's Authority

Students will submit to the lawful authority of teachers, administrators and other staff members.

#### Use or Display of Vulgar and Plainly Offensive, Obscene or Sexually Explicit Language

The use or display of vulgar and plainly offensive, obscene or sexually explicit language or graphics is prohibited. Clothing with vulgar and plainly offensive, obscene or sexually explicit references, graphics or comments is prohibited.

#### Damage or Destruction of School Property

No student will vandalize or attempt to destroy school property. The district will attempt to recover, through legal action if necessary, from those students or their parents the actual cost of repair or replacement of school property vandalized or intentionally or recklessly destroyed by students.

#### Damage or Destruction of Private Property on School Premises or During a School-Sponsored Activity

No student will cause or attempt to cause damage to private property either on the school grounds or during a school activity, function or event off school property.

#### Coercion, Assault, Menacing, Threats, Intimidation or Harassment

No student will coerce, assault, menace, intimidate, harass or threaten to harm another person for any reason including to obtain money or other property, or force any person to do any act against the will of that person. "Assault" means intentionally, knowingly or recklessly causing injury to another. "Menace" means by words or conduct the student intentionally attempts to place another person in fear of imminent serious physical injury.

#### Possession, Handling or Transport of Any Dangerous or Deadly Weapon

No student shall possess, handle or transmit any object that is reason-



ably considered a weapon on school grounds or off the school grounds at any school-sponsored activity, function or event, including in a student's motor vehicle. A weapon includes the following:

- a. **“Firearm”** means (A) any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of an explosive; (B) the frame or receiver of any such weapon; (C) any firearm muffler or firearm silencer; or (D) any destructive device.
- b. **“Dangerous weapon”** means any weapon, device instrument, material or substance which under the circumstances in which it is used, attempted to be used, or threatened to be used, is readily capable of causing death or serious physical injury.
- c. **“Deadly weapon”** means any instrument, article or substance specifically designed for and presently capable of causing death or serious physical injury.
- d. **“Destructive device”** means any explosive, incendiary or poison gas component or any combination of parts either designed or intended for use in converting any device into any destructive device or form from which a destructive device may be readily assembled.

**Dangerous or deadly weapons** include but are not limited to BB guns, pellet guns, airsoft guns, paintball guns, ammunition, stun guns, throwing stars, metal knuckles and any look-alike explosives, firearms and knives. The possession, use, or threat of use of a look-alike weapon is also prohibited.

**Use or Possession of Any Controlled Substances, Including Alcoholic Beverages and Drug Paraphernalia**

No student shall knowingly possess, use or transmit any drug paraphernalia or possess, use, transmit or be under the influence of any controlled substance or intoxicant of any kind on the school grounds or off the school grounds at a school-sponsored activity, function or event.

Use of a drug authorized by a medical prescription from a registered physician for use during school hours shall not be considered a violation. Students who must take prescription medication at school are to follow district adopted procedures.

**Violations of Laws While Involved in School Activities**

No student shall violate federal, state, county or city laws while involved in school activities.

**Misconduct that Occurs Off-Campus**

Students may face disciplinary consequences for (1) any off-campus behavior that would otherwise tend to disrupt the educational process or the operation of the school or district; (2) conduct that occurs off the school premises at school-related or supervised functions or at a school bus stop; or (3) behavior that occurs while traveling to and from school if the behavior has a threatening effect on student safety or physical or mental health.

**Sexual Misconduct/Indecency**

A student shall not engage in any act of sexual harassment of a physical nature or verbal nature. A student shall not perform any act of indecent exposure, lewd exposure, gesture or lewd caress or indecent fondling or touching of the student's own body or the body of another person, or any act of sexual intercourse. A student shall not use any inappropriate gestures that mimic or imply sexual acts or engage in any acts of “streak-

ing” or “mooning” as those terms are commonly understood. Such acts will not be regarded lightly or considered pranks. A student shall not possess, view, copy, sell, buy or transmit printed or non-printed pornographic materials.

**Teen Dating Violence**

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 the other person, or uses threatens sexual violence against the other person. Teen dating violence is prohibited.

**Use of Tobacco, Nicotine or Inhalation Devices**

The Tobacco Free Schools Rule (OAR 581-021-011) requires all school district property to be tobacco-free. A student shall not possess or use any form of tobacco, nicotine, nicotine delivery device or tobacco substitute (including but not limited to any cigarette, cigar, pipe, bidi, clove cigarette, smokeless tobacco, or e-cigarette) at any time on district property or grounds, including fields, parking lots and vehicles. No student, staff member or school visitor is permitted to use any form of tobacco, nicotine, nicotine delivery device or tobacco substitute at any time on school district grounds or in any building, facility or vehicle owned, leased, rented or chartered by the district or school.

*Reference: Board Policy JFCG, JFCH/JFCL, GBK; OAR 581-021-0110*

**Student Conduct: Disciplinary Types and Procedures**

*This portion of the handbook explains the major areas of inappropriate conduct and the accountability and consequences that may result for those students who engage in rule and policy violations.*

*All students are entitled to due process as it relates to discipline. Fair treatment of all students is essential and expected. Students are protected from arbitrary and unreasonable decisions. All decisions affecting students must be based on careful and reasoned investigations of the facts and must be consistent in the application of rules and regulations. All students will be informed of the school rules and procedures by which schools are governed and the process by which discipline will be applied.*

*School officials may find it necessary to discipline a student or remove the student from the formal learning environment for a period of time. School officials have discretionary power to invoke disciplinary actions and procedures in order to maintain a climate conducive to learning and to the protection of individuals and property. The school administrators shall consider the age and past pattern of behavior of a student in determining whether to suspend or expel that student. Before an expulsion can occur, there must be a hearing before the superintendent or the superintendent's designee unless waived by the student's parent or guardian or, if the student is 18 years of age or older, the student.*

**Informal Discipline Procedures for Minor Infractions**

Discipline for a minor infraction may be handled without going through all the steps of the formal process outlined below.

**Formal Discipline Procedures:**

**a. Suspensions**

**An in-school suspension** is a temporary exclusion from regular classroom attendance not to exceed two school days. The student is assigned to a supervised work area and, if permitted by the school administrator, may perform his or her regular class work with access to curriculum and special education related services (OAR 581-015-2400).

An **out-of-school suspension** is a temporary exclusion from school attendance for a period not to exceed 10 school days. In those cases in which the school official states that the suspension will continue until a parent conference occurs, the suspension notice will state that it will not exceed 10 school days. A school administrator may require a student to attend school during nonschool hours as an alternative to suspension. See Appendix 1, Due Process Procedures for Out-of-School Suspension.

#### b. Expulsions

An **expulsion** is a long-term exclusion from school attendance and requires a hearing before the superintendent or his or her designee. State law provides that the expulsion of a student will not exceed one calendar year. The use of an expulsion is limited to the following circumstances:

- For conduct that poses a threat to the health or safety of students or school employees;
- When other strategies to change student conduct have been ineffective; or
- When expulsion is required by law.

The school principal or designee may recommend an expulsion for any serious misconduct meeting the criteria above. School administration must request an expulsion hearing when he or she believes a student is guilty of the following offenses: the bringing of, possession, concealment or use of a firearm or dangerous weapon on school property or at a school-sponsored event; the sale or distribution of a controlled substance and a Category IV violation of the interagency substance abuse intervention and networking agreement (see Appendix 3). The expulsion period for such offenses will be one calendar year unless a specific exception is made by the superintendent.

The district will provide educational services to a student who is expelled.

#### c. Expulsion Hearings

Only the superintendent, as the designated representative of the district school board, or his or her designee has the authority to expel a student. A hearing must be conducted before an expulsion occurs unless the student's parents or guardian, or the student if 18 years of age or older, waives the right to a hearing. See Appendix 2, Due Process Procedures for Expulsion.

#### d. Out-of-School Suspension or Expulsion of Students Fifth Grade or Lower

For a student who is in fifth grade or lower, schools will limit the use of out-of-school suspensions or of expulsions to the following circumstances:

- Non-accidental conduct causing serious physical harm to a student or school employee;
- When a school administrator determines that the student's conduct poses a direct threat to the health or safety of students or school employees; or
- When suspension or expulsion is required by law.

When an out-of-school suspension is imposed, the school will take steps to prevent the recurrence of the behavior and return the student to the classroom setting so as to minimize the disruption of the student's instruction.

#### Suspension or Expulsion of Students with Disabilities (IEP or 504)

The district may suspend students with disabilities from their current educational placement for up to 10 school days in a school year to the same extent, and with the same notices, as for students without disabilities, if the removals do not constitute a pattern. These removals are not considered a change in placement.

When considering discipline of a student with a disability (or of a student not yet identified as disabled but suspected to have a disability) for more than ten (10) consecutive school days, or when a student would be removed for more than ten (10) cumulative school days from their current educational placement in a school year and the removals constitute a pattern as defined by law, the district must conduct a manifestation determination meeting to determine whether the behavior is related to the student's disability, or the direct result of the district's failure to implement the IEP or 504.

#### a. Behavior Is Not a Manifestation of Student's Disability

If the team, including the parent and other relevant members of the IEP team, determines that the student's behavior is not a manifestation of his or her disability or direct result of district failure to implement the student's IEP or accommodations on a 504 plan, the district may proceed with its disciplinary action. In addition, the district will:

- On the date the decision is made to expel the student, notify the parents of the decision and provide them with notice of procedural safeguards under OAR 581-015-2415;
- Provide services to the student in an interim alternative educational setting, determined by the IEP team in accordance with OAR 581-015-2445; and
- Provide, as appropriate, a functional behavioral assessment and behavior intervention services and modifications that are designed to address the behavior violation so that it does not recur.

#### b. Behavior Is a Manifestation of Student's Disability

If the team determines that the student's behavior is a manifestation of his or her disability, the student may not be expelled or suspended more than 10 days. The district will return the student to the placement from which he or she was removed, unless (1) the parent and the school agree to a change of placement, (2) the district removes the student to a 45-day interim alternative educational setting (IAES) for a weapon or drug violation or for infliction of serious bodily injury, or (3) the district obtains an order from an administrative law judge under OAR 581-015-2430 allowing a change of placement to an IAES for injurious behavior. Additionally, the team must either conduct a functional behavioral assessment (unless one has previously been conducted) and implement a behavior support plan; or if the student already has a behavior plan, review and modify it as needed to address the behavior.

#### Required Reports to Law Enforcement Agencies

Violations of the district's rules related to guns and dangerous weapons; vandalism and the intentional or reckless destruction of school property; and coercion, assault or threats must be reported to the police. A school official may inform the appropriate law enforcement agencies when a student is suspected of committing other illegal acts on the school campus or at a school-sponsored activity.

#### A Student's Right to Hear His or Her Accuser

##### a. Complaints and Accusations Made by Staff Members

A student may hear directly from the teacher or other staff member the specific complaints or descriptions of unacceptable behavior.

### b. Complaints and Accusations Made by Other Students

Extreme care must be taken by school officials to ensure that a student is not disciplined solely on hearsay evidence. In recognition of the special jeopardy in which student witnesses may be placed, and considering the possible traumatic effects on a student witness of adversarial proceedings conducted by attorneys, police officers or court officials, the complaining student may not be required to face the accused nor to have his or her identity revealed. When it is determined that a complaining student ought not face the accused, a school official may then become the official complainant. No licensed staff member may be examined as to communications between a student and that staff member in official confidence relating to the personal affairs of the student or the student's family if the communication will tend to incriminate or damage the student or the student's family. However, the school official conducting an investigation is under special obligation to ensure the careful and cautious investigation of all relevant facts and testimony.

### Teacher–Student Privilege

Except in criminal actions or proceedings, no licensed staff member may be examined in any proceedings as to any conversation between the licensed staff member and a student which relates to the personal affairs of the student or family of the student and which if disclosed would tend to damage or incriminate the student or family.

### Student Records

*Federal and state laws require school districts to maintain certain education records on students. The records allow the school staff to share progress information with parents and other educational institutions. They also document the eligibility of students for various federal and state mandated programs. Students frequently request copies of their records many years after they have left school to assist them in documenting school attendance and eligibility for certain programs.*

The following statement is a summary of school regulations regarding student records. School board policy contains the district's detailed regulations and is available for review at each school, at the Education Center, 200 North Monroe Street, and online at [www.4j.lane.edu](http://www.4j.lane.edu).

### Confidentiality of Education Records

All student records are confidential and may be opened for inspection only in accordance with applicable federal and state law and school board policy.

### Inspection of Education Records

Parents, legal guardians and students over 18 years of age ("eligible students") have the right to inspect the student's records within 45 days of the date of the request. Requests should be directed in writing to the school registrar or secretary. If the custody of a student has been granted to only one parent, the non-custodial parent also has access to all education records unless there is a court order to the contrary.

### Release of Education Records

Generally, parents or the student, if he or she is 18 or is attending an institution of higher education, have the right to consent to the release of student education records. The school district, however, may release student records without consent where the law permits. Common exceptions in which consent is not required are:

- a. To school board members during an executive session to consider the expulsion of a student;
- b. To district employees who have a legitimate educational interest in the records;
- c. To the officials of another school, school district, institution of post-secondary education, or other educational agency that has requested the records and in which the student seeks or intends to enroll. Schools are required to forward these records within 10 days of receiving the request.
- d. To state and federal officials requiring such information, subject to certain requirements;
- e. In connection with a student's application for or receipt of financial aid;
- f. To organizations conducting studies on behalf of the school district to develop, validate or administer predictive tests, administer student aid programs or improve instruction;
- g. To accrediting organizations to carry out their accrediting functions;
- h. To parents of a dependent student;
- i. To comply with a judicial order or lawfully issued subpoena after the district has made a reasonable attempt to notify the parent or eligible student or as otherwise provided by law; or
- j. For emergency situations involving the health or safety of the student or other persons. A "health and safety emergency" includes, but is not limited to, law enforcement efforts to locate a child who may be a victim of kidnap, abduction or custodial interference, and law enforcement or child protective services efforts to respond to a report of child abuse or neglect.

### Directory Information

The district may also release directory information in conjunction with a school or school district related activity. "Directory information" is defined as a student's name, parent's or guardian's name, address, telephone listing, electronic address, photograph, date and place of birth, participation in officially recognized activities and sports, weight and height if a member of an athletic team, grade level, dates of attendance, degrees and awards received, and the school most recently attended by the student. Parents may limit the release of directory information and will be notified annually of this right.

### Withholding of Education Records for Nonpayment of Fees, Fines or Damages

The district may withhold the grade reports, diplomas or other records of students who owe fees, fines or damages until those fees, fines or damages are paid, except that records must be released to another school district to which the student has moved, or as required by law. Parents or guardians or the student, if he or she is 18 years of age or older, must be given written notice at least 10 days in advance of the record being withheld. The notice will outline the procedure for challenging the school's decision, as well as the reason for the debt and the amount owed. The notice will also state that the district intends to withhold records or diplomas, and that the matter may be pursued through a collection agency.



**Copy of Policy on Education Records**

Parents, guardians and eligible students may obtain a copy of the district policies on education records (Policies JO/IGBAB, JOA, and JOB) online or upon request at each school or the district office.

**Right to File a Complaint re FERPA Requirements**

Parents or eligible students have the right to file a complaint with the U.S. Department of Education concerning alleged failures by the school district to comply with the requirements of FERPA. The name and address of the office that administers FERPA is: Family Policy Compliance Office, U.S. Department of Education, 400 Maryland Ave. SW, Washington DC 20202-5901.

**Amendment of Education Records**

Parents, guardians and eligible students have the right to request an amendment of the student’s education records believed to be inaccurate, misleading, or otherwise in violation of the student’s privacy or other rights. Requests should be made in writing to the school administrator, clearly identify the part of the record believed to be inaccurate, misleading or otherwise in violation of the student’s privacy or other rights, and specify why it is inaccurate. If the administrator decides not to amend the record as requested, the administrator will notify the parent or eligible student of the decision, and advise them of their right to appeal the decision, including to have a hearing regarding the request for amendment.

*Reference: Board Policy JO/IGBAB, JOA and JOB, FERPA*

**Students with Disabilities; Child Find**

*Both state and federal law (Section 504 of the Rehabilitation Act of 1973 and the Individuals with Disabilities Education Act) require schools to provide an appropriate education for students who have disabilities.*

The district provides a free and appropriate educational program for eligible students with disabilities. Appropriate services for each eligible child, and accommodations and modifications, are based on his or her disability and Individualized Education Plan (IEP) or Section 504 Accommodation Plan. Students with disabilities, or their parents, may contact their classroom teacher, a counselor or the school administrator if they believe accommodations or modifications need to be made or if they would like to be referred to receive special education services.

**Child Find**

Parents who believe their child may have a disability or would benefit from support services, or who know of any other child who might need special education services, should contact Education Support Services. For more information visit [www.4j.lane.edu/ess](http://www.4j.lane.edu/ess) or call 541-790-7800.

The district’s 504 coordinator is Dr. Cheryl Linder. She may be reached at [linder@4j.lane.edu](mailto:linder@4j.lane.edu) or 541-790-7800.

**Technology and Internet Use**

*The purpose of district-owned technology is to enhance the educational experience of students and to increase the operational and educational efficiency and effectiveness of staff. This includes access to the internet, information services, databases, email and other communication tools. Students are expected to use technology for educational purposes and in an appropriate manner. Teachers and other supervising adults are expected to guide and supervise students*

*who use district technology. District guidelines are summarized below. More complete guidelines for the use of the district network and other technology are available on the district’s website ([www.4j.lane.edu/cis/appropriate\\_use](http://www.4j.lane.edu/cis/appropriate_use)).*

**Email Accounts**

All district students are issued a district email account. All student email users are expected to use commonly accepted practices.

- a. High school and middle school students** have their district 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.
- b. Elementary students** may have their district email account activated with written consent from their parents or guardians and the consent of their teacher.
- c.** Once activated, email accounts remain activated until the student is no longer a district student or the parent denies consent.

**Unacceptable Uses of District-Owned Technology**

The unacceptable use of the 4J network, equipment and other technology may result suspension or revocation of network privileges, equipment privileges and/or other disciplinary action. Unacceptable uses include but are not limited to:

- Violation of school board policy, district administrative rules or any provision of this handbook.
- Violation of any local, state, or federal law. This includes but is not limited to transmission of copyrighted materials, threatening or obscene material, or material protected by trade secret.
- Use of district technology to organize activities that are clear violations of the law or district rules.
- Use of profanity, obscenity, or other language that may be offensive to another user.
- 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.
- Knowingly accessing inappropriate materials or sharing inappropriate materials or their sources with other students.
- Use of district technology to access vulgar and plainly offensive, obscene, pornographic or sexually explicit language or material in any form.
- Use of district technology for financial gain, commercial activity or illegal activity (e.g., hacking).
- Use of district technology for political activity.
- Accessing another person’s individual account.
- Copying and/or downloading commercial software, apps or other material (e.g., music) in violation of federal copyright laws.
- Creating and/or placing a computer virus on the network.
- Activity with a malicious intent to disrupt the network.
- Any form of vandalism, including but not limited to damaging technology equipment (e.g., computers, tablets, printers, projectors, interactive equipment, etc.) or networks or disrupting the operation of the network.
- Installation of unapproved equipment (e.g. wireless access points, routers, switches, network cabling not provided or approved by the district’s Technology Department), unapproved or unlicensed software/apps, or changing of district settings.
- Bypassing of district-specified filtered internet websites on devices used by students.

**Unacceptable Uses of Personal Devices**

Students and staff are encouraged to use district technology devices



whenever possible. Students may be allowed, but are not required, to use their own personal electronic devices that support academic activities and independent communications. Unacceptable use of personal technology devices by students may result in suspension or revocation of personal device privileges and/or other disciplinary action. Unacceptable uses include but are not limited to:

- Use of a personal technology device in a manner that violates any of the restrictions for district-owned technology listed above.
- Use of a personal technology device to gain or give an advantage in a testing situation.
- Downloading and installing district-licensed software/apps on personal technology devices unless specifically allowed by the licensing agreement.
- Use of a personal device during school hours or non-school hours that causes a material and substantial disruption to the educational environment, or creates a foreseeable risk of the same. This could include filming, taping or photographing others without consent.

**Use of Force**

A teacher, administrator, school employee or school volunteer is authorized to use physical force upon a student only when, and to the extent, the application of force is consistent with the following. Except in case of an emergency, only staff current in the required training program will implement physical restraint with a student. Physical restraint may be used only when and for as long as 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. Notice of an incident involving the use of physical restraint will be made to the student’s parent or guardian.

Corporal punishment is any act that willfully inflicts or willfully causes the infliction of physical pain on a student. This act is strictly prohibited by the district and by law (ORS 339.250(9)).

*Reference: Board Policy JGAB, ORS 339.291, OAR 581-021-0553*

**Use of Motor Vehicles**

Students who are licensed drivers have been granted the privilege of driving a motor vehicle to school. Certain regulations are necessary to control the use of motor vehicles because of limited parking, traffic patterns and the large number of pedestrians around schools.

The administrator of each school or district property is authorized to establish regulations governing the use of motor vehicles on school or district property, and may charge a parking fee. These regulations shall be reasonable and communicated through the school’s parking permit process. Permission to drive a motor vehicle onto school or district premises may be revoked if the driver does not obey school or district regulations and local and state traffic laws.

Students may not transport other students to or from school-related field trips.

**Use of Tobacco**

*The Tobacco Free Schools Rule (OAR 581-021-0110) requires all school district property to be tobacco-free.*

No student, staff member or school visitor is permitted to use, and no student is permitted to possess, any tobacco product, nicotine, nicotine delivery device or tobacco substitute at any time (including nonschool hours) on school grounds, including athletic grounds and parking lots, or in any building, facility or vehicle owned, leased, rented or chartered by the school or school district.

Prohibited materials 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, nicotine delivering devices and any other tobacco substitute (e.g., e-cigarettes). This does not include FDA-approved nicotine replacement therapy products used for the purpose of cessation.

**Visitors and Trespassing**

*To help protect students and school property, and to prevent disruptive activity, school officials must know if any persons who are not members of the school staff or student body are in the school building or on the school grounds. Any visitors, including former students, who are in violation of visitation rules will be considered to be trespassing.*

**Visitors Permitted on School Grounds**

Visitors are permitted on school grounds as long as their presence is not for the purpose of disrupting school, nor threatening, nor intimidating others in school, and so long as school officials know of and consent to the visit in advance.

**Visitors Must Report to the Office**

During a regular school day all visitors are required to first report to the school office to arrange for their visit.

**Weapons Prohibited**

While on school district property or at a school-sponsored event that occurs off of school property, no person, with the exception of law enforcement officers or those authorized by the superintendent, shall have possession of a loaded or unloaded firearm, dangerous weapon, or a replica or facsimile of a dangerous weapon, nor sell or transfer possession of such a weapon to another person.

**Students Who Have Been Suspended or Expelled**

Students may not attend any district school or any school-sponsored activity or be on any school district property when they are suspended or expelled from school, except with consent of a school district administrator. Students who violate this policy may be prosecuted for criminal trespass.

**Violations of Visitation Rules**

Visitors who are in violation of this policy will be considered in violation of the law and will be subject to prosecution for criminal trespass in the second degree, as provided by ORS 164.245.



## Appendix 1

### Due Process Procedures for Out-of-School Suspension

A suspension temporarily denies a student the right to attend school, classes and school activities for a period of up to ten (10) school days. When a student's behavior may lead to a suspension, the administrator or designee will take the following steps.

1. The student shall be given oral or written notice of the charges, including specific acts involved. If the student denies the charges, the student shall be given an explanation of the evidence supporting the charges.
2. The student shall be given an opportunity to explain his or her conduct and to informally contest the charge. If the administrator then determines the student should be suspended, the student shall be informed and the student's parents or guardians shall be notified by telephone, whenever possible, of the suspension and the reasons for the action.
3. The two steps above may be postponed in emergency situations relating to health and safety. Emergency situations shall be limited to those instances where there is a serious risk that substantial harm will occur if suspension does not take place immediately.
4. When parents cannot be contacted, the decision to send the student home, to allow the student to remain on school premises, or to refer him or her to the proper authorities must be made with consideration given to the student's age, maturity and the nature of the misconduct that caused the suspension.
5. The parents or guardians will be notified of the suspension in writing. The notice must state the date, the reasons for the suspension, the length of the suspension (not to exceed ten school days) and the procedures that must be followed by the student and parents or guardian to gain reinstatement.
6. After the parents or guardians receive notice of the suspension, they will be given a conference with the building principal or his or her designee if they so request.
7. After the parents or guardians have discussed the suspension with the principal or his or her designee, they may appeal the decision to the deputy superintendent or a designee, whose decision will be final.

## Appendix 2

### Due Process Procedures for Expulsion

An expulsion is a long-term exclusion from school attendance and from all district schools and activities unless otherwise specified. The expulsion of a student will not exceed one calendar year.

The superintendent or designee is the only person authorized by the school board to expel a student and in each case must follow an expulsion process including a hearing by the superintendent or designee. The student may be suspended pending the expulsion hearing. Prior to the expulsion of a student, the district will consider and propose alternative programs of instruction or counseling or both for the pupil.

Any student who brings a dangerous weapon onto school property or to a school-sponsored activity, or possesses, conceals or uses a dangerous weapon on school property or at a school-sponsored activity, shall be expelled for one calendar year unless a specific exception is made by the superintendent or the superintendent's designee.

The following is a summary of the expulsion procedures. The expulsion procedures are outlined in detail in district administrative rules.

1. The principal or assistant principal notifies the parent or guardian and the student in writing of the intent to request expulsion, citing the charges against the student.

2. The principal or assistant principal submits to the superintendent a written request for expulsion including a description of the charges with supporting facts and evidence.
3. The superintendent sets a date and place for an expulsion hearing.
4. A hearing officer designated by the superintendent conducts the expulsion hearing. The principal or assistant principal presents all evidence supporting the proposed expulsion, and the student has an opportunity to respond to the evidence and to present his or her version of the events. The student may choose to have counsel or representation at the hearing.
5. Where the student or the student's parent does not use English as a primary language, an interpreter will be provided by the district.
6. The hearing officer determines the facts of the case on the evidence presented at the hearing and makes a written recommendation to the superintendent, including findings, conclusions and specific recommendations.
7. The superintendent states the decision in identical form to the student and parent or guardian, their representative and the principal or assistant principal, requesting the expulsion no later than three school days following the hearing.
8. The student and parent or guardian may appeal the decision to the school board through a written request directed to the superintendent within 72 hours after receiving the decision.
9. A parent, or the student if 18 years of age or older, may waive the right to a formal hearing by completing a form entitled "Waiver, Stipulation of Facts and Recommendation for Expulsion" if the student and parents agree to the facts and reasons the administrator has given for proposing an expulsion, and they accept or successfully negotiate the recommended expulsion action and the alternative education option to be provided for the duration of the expulsion. The administrator must provide the student and his or her family with a copy of the district's expulsion procedures, which informs them of their rights before they sign a waiver. This alternative process may not be used for a special education student, or if the administrator is requesting an exception to the requirement that there be a one-calendar-year out-of-school expulsion for a violation of the district's weapons policy.

## Appendix 3

### Category IV Violations of the Memorandum of Understanding Substance Abuse Intervention/ Networking Program

The following violations of the substance abuse memorandum of understanding while at school or any school-sponsored activity will result in a referral for an expulsion hearing.

1. Repeat of a Category III offense. Category III Offenses:
  - Possession of less than 1 ounce of marijuana;
  - Possession, including possession by consumption, of alcohol;
  - Distribution, for no compensation, of alcohol or less than 1 ounce of marijuana; and
  - Use of toxic vapors, in violation of city or county ordinance.
2. Sale, distribution or unlawful possession of a drug or any controlled substance.
3. Any alcohol, drug or controlled substance related offense that creates a substantial risk to public health.
4. Driving under the influence of intoxicants (DUII).
5. Solicitation by a student or other students to buy, sell or otherwise distribute alcohol, drugs or any controlled substance in any amount.
6. Sale or distribution for compensation of alcohol to a student.
7. Giving or selling hypodermic devices to a student who has no lawful/authorized use for the device.





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Note: This index is intended as a helpful guide to the reader. It is not necessarily a complete or comprehensive list.

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**EUGENE PUBLIC SCHOOLS**  
**School District 4J, Lane County**  
**Eugene, Oregon**

**STUDENT DISCIPLINE**

**Discipline of Students - School Board Policy JG**

A balance of student rights and responsibilities is necessary in each school and classroom to assure an atmosphere which is conducive to learning and which assures the safety and welfare of students and school personnel. The Board believes that an educational program designed to meet the learning needs of the students and to produce constructive behavior and self-discipline is the best approach for resolving discipline problems. Disciplinary actions by school personnel will be most effective when applied fairly and consistently and when students and their parents understand the methods and reasons for disciplinary measures.

Specific rights and responsibilities of students have been adopted by the Board and shall be widely publicized in School District 4J. (See Student Rights and Responsibilities Handbook.) The Superintendent is responsible for developing procedures to implement this policy.

**Duties of Students - School Board Policy JFA**

Students' conduct in School District 4J shall be based on respect and consideration of human rights. All students are required to:

1. Obey the statutes of the state of Oregon and ordinances of the city of Eugene and of Lane County.
2. Comply with the written rules of the Board of Directors as specified in the Student Rights and Responsibilities Handbook (published by the district), pursue the prescribed course of study, and submit to the lawful authority of teachers and school officials.
3. Behave in a socially acceptable manner, which includes avoiding the use of obscene or profane language, treating other people fairly, refraining from racial or sexual harassment or discrimination by words or actions or placing another person or person's property in reasonable fear of harm, respecting personal and public property, and refraining from physical aggression.
4. Obey the rules and regulations developed in their school.

Students who violate these requirements and do not control their behavior will be subject to the enforcement of consequences necessary to develop or maintain the expected behavior or be liable for expulsion from school.

Before any consequence for unacceptable conduct is enforced, the student shall be informed of what he or she has done which has brought about the consequence, and the student shall be given an opportunity to explain his or her conduct.

Students may face disciplinary consequences for conduct that occurs off the school premises at school-related or supervised functions and at a school bus stop, including (1) behavior that occurs while traveling to and from school if the behavior has a threatening effect on student safety or physical or mental health or (2) any off-campus behavior that would otherwise tend to substantially disrupt the educational process or the operation of the school or district.

Consequences for unacceptable behavior will always be appropriate to the student's age, physical condition, developmental capacities, and the nature of the misconduct. Psychologically hurtful consequences such as ostracism, ridicule, or rejection shall never be used, and corporal punishment will not be used. Suspension or expulsion may be used, subject to specific guidelines and procedures contained in the Student Rights and Responsibilities Handbook and in District Administrative Rules.

### **Use of Physical Restraint and Seclusion – School Board Policy JGAB**

Except in the case of an emergency, only staff with current training in 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 employee as necessary when the student's behavior poses a reasonable threat of imminent, serious bodily injury to the student or others. The use of physical restraint/ seclusion under these circumstances is permitted only so long as the student behavior poses a threat of imminent, serious bodily injury. Any student being restrained or secluded either in an emergency or as part of a plan shall be constantly monitored by staff for the duration of the intervention. Any room used for seclusion must allow staff full view of the student and be free of potentially hazardous conditions, such as unprotected light fixtures and electrical outlets. Oregon law prohibits prone restraints (ie, a restraint in which a student is held face down on the floor) and mechanical restraints.

Additional procedures are required following the administration of physical restraint or seclusion. Please review the enclosed administrative rule on the Use of Restraints and Seclusion.

### **DISTRICT PROCEDURES**

The following procedures relating to student disciplinary matters shall be followed in implementing Board policies JG, JFA, and JGAB in administering the provisions of the Student Rights and Responsibilities Handbook:

1. A teacher who observes a student breaking a school rule, district rule, or otherwise behaving in an unacceptable manner shall take immediate steps to correct the situation.

The disciplinary action of a teacher shall be reasonably related to the student behavior and shall be fairly and consistently administered.

Actions of teachers may include, but are not limited to, the following:

- a. A teacher may retain a student after school if the parent has been given prior notice. If the parent cannot be contacted on a particular day, the student will normally fulfill his or her obligation to meet after school the following day.

- b. A school employee may use reasonable physical force upon a student when and to the extent the application of force is consistent with Board Policy JGAB (see summary above) Any staff member using physical restraint shall inform the principal at once of such action and shall make an accurate written account to the principal by the end of the working day. A teacher may not use physical punishment.
  - c. When, in the judgment of a teacher, a student's behavior is seriously disrupting the instructional program to the detriment of other students, the teacher may temporarily exclude the student from the classroom and refer him or her to the principal. This means that an unruly student may be sent to the office or another prearranged location because of unacceptable behavior. In such case, the principal shall arrange as soon as possible and, under normal circumstances, not later than the conclusion of the following day, a conference to include the principal, the teacher, and if appropriate, a specialist, to discuss the problem and decide upon appropriate steps for its resolution. Parents or guardians should be kept informed in cases of serious disciplinary problems caused by their children, and the parents may join in any conference involving discussions for resolving those problems.
2. Any serious infraction of a rule or behavior which endangers the safety of a student or staff member, or which substantially disrupts a class, activity, or other school function, shall be reported immediately to the principal or assistant principal. When a serious infraction has been reported which endangers others or substantially disrupts a class, the principal or designee shall take prompt steps to alleviate the problem.
- a. The principal will hold a conference with the unruly student, the teacher, and, if feasible and appropriate, the parent, to establish reasonable conditions for the student's readmission to the class. The teacher or staff member reporting the misbehavior may be required to make a written report or describe the incident in the presence of the student and his or her parent.
  - b. The principal will seek assistance, if appropriate, from Educational Support Services or responsible community agencies to explore options with the teacher, parent, and student in an effort to resolve the problem.
  - c. If the student chronically disrupts the class, the principal shall give serious consideration to reassigning the student to another class or dropping the student from the course. When such action is considered, the principal shall involve the teacher(s) and the appropriate Director or a member of the Educational Support Services staff.
  - d. Principals may suspend students for a period of time not to exceed 10 school days. Removals beyond 10 days require approval of an ESS administrator and additional procedures required by law. When a suspension is made, the principal must ensure the students and parent the procedural rights provided in the Student Rights and Responsibilities Handbook, IDEA and /or Section 504.
  - e. Expulsion procedures, as defined in the Administrative Handbook, may be recommended by the principal when the above procedures have not significantly changed the disruptive behavior.

3. The principal of each school has been authorized to take appropriate steps to assure an atmosphere which is conducive to learning and which provides for the safety and welfare of students and school personnel. A designee shall be named by the principal to serve in his or her absence. The principal may reassign a student or may involve a law enforcement agency, if necessary, to protect the safety or welfare of students or staff members. When appropriate, principals shall involve students, parents, and staff in resolving disciplinary problems and may also use the expertise of others.

The principal is responsible for establishing school procedures or guidelines which may be necessary to supplement the district policy and procedures. School staffs, advisory councils, and students shall be invited to participate in the development of written procedures or guidelines.

4. Teachers are responsible for supervising students assigned to them. Teachers may use appropriate disciplinary action in accordance with district and school rules and guidelines. Teachers are obligated to serve as part of the total school team to enforce school and district rules and share in the general supervision of the school.
5. Any employee involved in an assault or battery within the scope of his or her employment shall immediately make a written report of the circumstances. The employee shall make supplemental written reports, attaching copies of any summons, complaints, process, information, indictment, notice, or demand served on him or her in connection with such assault or battery within five (5) days after being served, and shall report the final disposition of any such proceeding. All reports referred to above shall be made to the employee's principal or immediate supervisor.

Such reports shall be forwarded immediately to the Superintendent's office. In the event civil or criminal proceedings are brought against the employee, the Superintendent shall comply with any written requests by the employee for information in the district's possession relating to his or her defense. The district shall not be required to provide information privileged by law.

The school district reaffirms its policy to provide safe working conditions for employees and to support reasonable policies to maintain order in the schools.

8/12/80  
Revised 8/1/89  
Revised 7/24/97  
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CN:cn

# 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

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**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.



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?**

<input type="checkbox"/> NO	<input type="checkbox"/> YES —	<b>Reported offender</b> (check one):	<b>Reported victim</b> (check one):
		<input type="checkbox"/> Student	<input type="checkbox"/> Student
		<input type="checkbox"/> Teacher	<input type="checkbox"/> Teacher
		<input type="checkbox"/> Parent	<input type="checkbox"/> Parent
		<input type="checkbox"/> Administrator	<input type="checkbox"/> Administrator
		<input type="checkbox"/> Other	<input type="checkbox"/> Other
		<input type="checkbox"/> Other Staff	<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  
Orig. Code(s): AC

## **Nondiscrimination**

The district prohibits discrimination and harassment on any basis protected by law, including but not limited to, an individual's perceived or actual race, color, religion, sex, sexual orientation<sup>1</sup>, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veterans' status, or because of the perceived or actual race, color, religion, sex, sexual orientation, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status or veterans' status of an individual or any other persons with whom the individual associates.

The district prohibits discrimination and harassment in, but not limited to, employment, assignment and promotion of personnel; educational opportunities and services offered students; student assignment to schools and classes; student discipline; location and use of facilities; educational offerings and materials; and accommodating the public at public meetings.

The Board encourages staff to improve human relations within the schools, to respect all individuals 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 of 1990 and Americans with Disabilities Act Amendments Act of 2008 (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 district will publish complaint procedures providing for prompt and equitable resolution of complaints from students, employees and the public.

The district prohibits retaliation and discrimination against an individual who has opposed any discriminatory act or practice; because that person has filed a charge, testified, assisted or participated in an investigation, proceeding or hearing; and further prohibits anyone from coercing, intimidating, threatening or interfering with an individual for exercising any rights guaranteed under state and federal law.

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):**

[ORS 174.100](#)  
[ORS 192.630](#)  
[ORS 326.051\(1\)\(e\)](#)  
[ORS 659.805](#)  
[ORS 659.815](#)  
[ORS 659.850 to -860](#)  
[ORS 659.865](#)  
[ORS 659.870](#)  
[ORS 659A.003](#)

[ORS 659A.006](#)  
[ORS 659A.009](#)  
[ORS 659A.029](#)  
[ORS 659A.030](#)  
[ORS 659A.040](#)  
[ORS 659A.103 to -145](#)  
[ORS 659A.230 to -233](#)  
[ORS 659A.236](#)  
[ORS 659A.309](#)

[ORS 659A.321](#)  
[ORS 659A.409](#)  
  
[OAR 581-021-0045](#)  
[OAR 581-021-0046](#)  
[OAR 581-021-0049](#)  
[OAR 581-022-1140](#)  
[OAR 839-003-0000](#)

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.

## 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).

**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, ertc.) are also not included in determining excessive absences.

## Notice Requirements for Leave

Type of Leave	Notice Expectation <sup>1</sup>
<b>Sick Leave</b>	Notify immediate supervisor as soon as practicable. The general expectation is at least 30 minutes prior to start of scheduled shift. If the leave is foreseeable, notice to the supervisor should be at least 10 days prior to the date the leave is to begin or as soon as otherwise practicable.
<b>Personal Days</b> (EEA, MAPS)	Schedule with immediate supervisor at least 24 hours in advance unless emergency in nature. Supervisor must have advance approval from the Human Resources Director if the day is adjacent to a holiday or break.
<b>Miscellaneous Days</b> (OSEA)	Schedule and receive approval from immediate supervisor at least 24 hours in advance unless emergency in nature. Miscellaneous leave can be used for emergencies or personal business that cannot be conducted outside the workday.
<b>Family Illness Days</b>	Notify immediate supervisor at least 30 minutes prior to start of scheduled shift. Can only be used to care for an immediate family member when they are sick.
<b>Unpaid Day</b>	<p>Must have written approval from the Human Resources Director prior to the use of unpaid day.</p> <p>Requests must be submitted no less than 48 hours before a known absence. If the unpaid day is related to an illness the request must be sent within three work days upon return to work.</p> <p>To request an unpaid day an employee should follow the below procedure:</p> <ol style="list-style-type: none"> <li>1. Send an email to their administrator/supervisor and <a href="mailto:4J_leaves@4j.lane.edu">4J_leaves@4j.lane.edu</a> requesting the unpaid day and including the reason for the request.</li> <li>2. The administrator/supervisor should email both the employee and the <a href="mailto:4J_leaves@4j.lane.edu">4J_leaves@4j.lane.edu</a> email if they support the request or are denying the request.</li> <li>3. If the administrator/supervisor has supported the request then it will be reviewed by the Human Resources Director.</li> <li>4. If approved, the Human Resource Director will email both the employee and supervisor their approval.</li> </ol>
<b>Vacation</b> (12 month employees)	Schedule with and obtain approval from immediate supervisor at least three weeks in advance.

## Notice Requirements for Leave

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<p><b>OFLA/FMLA</b> (unpaid but may be able to use some of the accrued paid leave listed above)</p>	<p>Complete and submit a leave request with the Human Resources Department.</p> <p>For a foreseeable leave, submit a leave request to HR at least 30 days in advance, or as soon as practicable.</p> <p style="text-align: center;">- or -</p> <p>For an unforeseeable leave, notify your immediate supervisor as soon as practicable and no later than 24 hours of an unforeseeable leave and complete a leave request with HR no later than three days after the unforeseeable leave has started.</p>
<p><b>Jury Duty</b></p>	<p>Notify immediate supervisor as soon as you receive the request to serve and on each day of service.</p>
<p><b>Bereavement Leave</b></p>	<p>For an unforeseeable leave, notify immediate supervisor as soon as possible, but no later than 24 hours after start of leave. Must complete a leave request with the HR department within three days of return to work.</p> <p>For a foreseeable leave, notify immediate supervisor at least 30 days prior to leave, or as soon as practicable. Must complete a leave request with the HR department at least 30 days prior to leave, or as soon as practicable.</p>
<p><b>Discretionary Leave (MAPS)</b></p>	<p>All notification requirements for each type of leave apply depending if the leave is used for sick, family leave or personal leave. Follow the applicable notice requirements listed above.</p>

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<sup>i</sup> “Notify” means you will directly contact your supervisor by email, text, phone or other method specified by your supervisor.



# 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.

## **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.
- 

## **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 student-initiated 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.

## **Guidelines for Email Signatures**

These guidelines are intended to promote a professional, businesslike image in all Eugene School District 4J employee email communications.

Email signatures should include your name, the school or department to which you are assigned, the name of the school district, email address and telephone number. You may also include your job title as reflected in official district records. To use a working title instead of your official job title, you must obtain written permission from a Human Resources administrator.

Email signatures should be in black text in an easily accessible font. The district name is Eugene School District 4J with the words in that order and the J in 4J capitalized.

Email signatures should not include colored text, complicated fonts, images, clip art, background, any personal quotes, slogans, legal disclaimers, or a job title other than your official job title.

### **Format Order:**

Your name

Your official title (optional)| School or Department

Eugene School District 4J

Email address | Office Phone

Fax (optional)

### **Sample Employee Signature:**

Jane Doe

Teacher, Ace Elementary School

Eugene School District 4J

doe\_jane@4j.lane.edu | 541-790-XXXX

## 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).



# 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](#)

## G2400 – Reporting Child Abuse

Last updated: Apr 21 2009 – 10:01am

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3. Rape of a child, sexual abuse, or sexual exploitation;
4. 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;
5. Threatened harm to a child, which means subjecting a child to a substantial risk of harm to the child's health or welfare;
6. Buying or selling a person under 18 years of age;
7. Permitting a person under 18 years of age to enter or remain in or upon premises where methamphetamines are being manufactured; and,
8. 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:

[ORS 419B.010](#)

## **I1700 – Community Educators (Guest Speakers) and Outside Presenters**

Last updated: May 3 2010 – 9:46am

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:

- 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.
- The information presented should be age appropriate and relevant to curriculum and classroom instruction.
- The information must be presented in a neutral and non-discriminatory manner.
- 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.



## FAQ for Staff – Supporting Undocumented Students – Updated February 2017

Dear 4J staff:

On February 15, 2017, the 4J Board of Directors unanimously approved a resolution affirming the board’s commitment to a safe, inclusive and supportive school environment for all students, regardless of their national origin, immigration or documentation status. That resolution and more information for parents and community members are available on the district website in English and Spanish.

We are writing to ensure all staff are aware of and are able to respond to common questions about support of students who are undocumented or come from families who are undocumented.

Each employee is expected to review and follow the guidelines in this FAQ. There are some revisions from the guidelines shared in January so please review this carefully. If you have questions after reviewing it, please ask your supervisor or send an email to [hr@4j.lane.edu](mailto:hr@4j.lane.edu) with the subject line “FAQ – Undocumented Students.”

### **1. Do undocumented students have a right to attend public schools? Do schools have an obligation to educate undocumented students?**

Yes. Every public school in Oregon has a legal obligation to educate every child, regardless of whether the child is a legal resident of the United States. Specifically, the United States Supreme Court ruled that undocumented school children have a constitutional right to equal access to K-12 education. As the court explained, these children are in the U.S. through no fault of their own, and denying them a basic education would take an “inestimable toll.” Education prepares individuals to be “self-reliant and self-sufficient participants in society.” *Plyler v. Doe (1982)*.

### **2. Should district staff collect or retain information on student immigration status, or that of students’ parents?**

No. The district does not collect information on the immigration status of students or parents. 4J employees may not ask about or document a student’s immigration status or that of the student’s family members.

### **3. May staff members disclose information about a student’s immigration status? To what extent are student records confidential?**

No. Staff may not disclose the immigration status or other personal information about any student or his/her family, without prior parental consent or the authorization of the district to do so. The disclosure of such information may jeopardize the right of a student to attend public

school and expose the district to liability. The disclosure may also violate the Federal Educational Rights and Privacy Act (FERPA).

Eugene 4J staff are expected to follow district policies including Board Policy JO and JOB, as well as state and federal laws concerning student records. Students' educational records and the personally identifiable information in those records are strictly confidential. Such records may not be released to anyone by any employee without the prior consent of the parent (or eligible student) unless one of the narrow exceptions to that rule applies. Exceptions include staff within the district who have a legitimate educational interest, another school or district where the student is seeking to enroll, or a court order. Even when records have been subpoenaed, the district must follow a process prior to their disclosure.

Student records laws do not contain a blanket exception for law enforcement. Therefore, employees may not provide records to law enforcement except where permitted by law. For example, if there is a health and safety emergency (which is narrowly defined), the school shall disclose personally identifiable information from a student record to law enforcement, child protective services, health care professionals and other appropriate parties if knowledge of the information is necessary to protect the health and safety of the student and others.

The district may – but is not required to – disclose directory information to the extent that the district has designated certain information as directory information and a parent has not opted out of the disclosure of directory information. Employees should not release directory information except with administrative direction. Please see Board Policy JO, JOA and JOB for more information about student records.

Requests for student records and sensitive or confidential information should be directed to the appropriate channels at the school. Any employee who is unsure should ask his or her supervisor.

Requests by an immigration official for any information about a student, even “directory information,” may not be granted at the school level, and must be referred to the office of the superintendent to approve the request or not.

#### **4. May immigration officials access students at school without a warrant?**

No. Any member of the public may access the front office of a school or other public area such as an office lobby. However, no visitor may access the private areas of a school without the permission of the front office. School employees may not consent to immigration officials' request to access the school unless directed by the superintendent or designee.

In the event an immigration official requests access to a private area of a school, to interview a student, or to provide other information about a student, the request shall be initially denied. The school shall inform the official that 4J procedures require that such requests go through the superintendent's office which will respond to such requests, and refer the official to the superintendent's office at the 4J Ed Center. The school should then immediately contact the

superintendent's office. The superintendent or designee, in consultation with legal counsel, will determine if the request should be granted.

If a school has reason to believe that a person is impersonating a law enforcement agent, the school should call the school resource officer or 911 immediately.

#### **5. How should an administrator respond to a search warrant or court order from immigrations officials?**

An administrator presented with a court order or warrant by an immigrations officer demanding access to a student, to confidential information, or to private spaces of a school, shall refer the officer to the superintendent's office at the 4J Ed Center. The school should immediately contact that office or the district's legal counsel.

The superintendent's office in consultation with legal counsel will request the agent's identification, badge number and phone number of supervisor, purpose of visit, closely review the scope of the order or warrant and determine next steps.

If an immigration officer insists on remaining at the school, ask the officer to wait, call district legal counsel or the superintendent's office, and inform the officer that legal counsel is on the way.

#### **6. May school staff release a student to the custody of law enforcement?**

A law enforcement officer or an official from the Department of Human Services may not take a child from school without a court order, making an arrest, taking a student into protective custody, or permission of the parent or guardian.

#### **7. If a student's parent is detained as the result of an immigration enforcement action or raid, what should we do?**

The school will work to ensure the safety of a student affected by an immigration enforcement action, will notify students when possible, and will not knowingly release a student into a hazardous situation. The school will make multiple attempts to contact the persons listed on the student's emergency contact list. If these efforts are unsuccessful, the school will contact the Oregon Department of Human Services. The transportation department will be alerted, and staff may be asked to work extended hours to ensure students are transitioned safely. Staff may not take students home.

Please encourage all families to have updated emergency contact information about who is authorized to pick up a student from school, and to consider including multiple options. Crisis plan tools for parents who wish to plan for their children's care in the event they are unavailable to do so can be found at: <https://www.latnet.org/community-resources/>

#### **8. Are there any other staff obligations I should be aware of?**

The procedures in this memo are designed to ensure a safe environment for students, and an orderly process for handling requests from immigration authorities. They do not cover every conceivable situation. If there is a safety emergency that presents imminent danger of harm, you are expected to take steps necessary to protect students and staff. Please also be aware that federal law prohibits the obstruction of justice, so – for example – you should not destroy evidence, make false statements, or physically intervene in an arrest. Individuals could face individual consequences for violating criminal laws.

All children are entitled to public education regardless of their immigration status or that of their parents, and employees are expected to create safe, welcoming and equitable educational environments for all students. All employees must report suspected acts of bullying, harassment and discrimination against students to administrators. All employees must refrain from actions that discriminate against a 4J student on the basis of national origin, race, color, sexual orientation, gender identity, gender, and other protected status.

If you learn about a practice or policy that has an unintended discriminatory impact on the right of any child to a public education, please communicate that to your supervisor.

While it is wise to prepare for the possibility of such requests, it is also true that (1) we are not aware of any Oregon school that has been approached by immigration officials for information or enforcement actions; and (2) the Department of Homeland Security appears to be following its “sensitive locations” policy. By its own internal policies, the department generally avoids immigration enforcement at schools, bus stops, education-related activities or events, as well as medical facilities and places of worship. If this policy changes, we will let you know promptly.

Thank you for reviewing this memo.



Eugene School District 4J  
**School Board Resolution**  
February 15, 2017

***Resolution affirming commitment to a safe, inclusive, and supportive school environment for all students, regardless of national origin, immigration status, or documentation status.***

WHEREAS, the fundamental purpose of the Eugene School District 4J is to give **all** of our students an excellent education by providing them with equitable access to a high quality, well-rounded educational experience that is rigorous, culturally responsive, healthful, and engaging; and

WHEREAS, equity and access to education are core values of our district, manifested by a steadfast commitment to creating a welcoming school climate for all students and families, and direction of the supports and resources needed to eliminate barriers and promote student success; and

WHEREAS, Supreme Court precedent (*Plyler v. Doe*, 457 U.S. 202 (1982)), requires that all students be provided with equal access to public education, regardless of their immigration status or that of their parents or guardians; and

WHEREAS, under ORS 181A.820 Oregon law enforcement agencies are prohibited from expending agency moneys, equipment or personnel for the purpose of detecting or apprehending persons whose only violation of law is that they are persons of foreign citizenship present in the United States in violation of federal immigration laws, subject to the exceptions of that law; and

WHEREAS, public schools and school districts in Oregon are subject to all federal and state laws and constitutional provisions prohibiting discrimination, and Eugene School District 4J promotes nondiscrimination and an environment free of harassment based on an individual's race, color, religion, sex, sexual orientation, gender identity or expression, national origin, marital status, age or disability as per District policies AC and JB; and

WHEREAS, we know that our children's safe and inviting educational environment would be severely disrupted by the presence of U.S. Immigration and Customs Enforcement (ICE) officials who might come into District schools for the purposes of removing students or their family members or obtaining information about students or their families; and

WHEREAS, the Board further believes that our students' ability to succeed would be negatively impacted by the removal of their family members by ICE, which could leave students without supervising adults to care for them; and

WHEREAS, we recognize that national events and the current political climate have caused uncertainty and anxiety for many in our communities, and that we share in the responsibility to respond to these circumstances on behalf of District students, families and educational professionals; and

WHEREAS, in these times, we recognize that our education mission is more critical than ever because we believe that our work with all students can help us bridge our differences and can help bring us together around respect and understanding rather than fear.

NOW, THEREFORE, BE IT RESOLVED THAT District policies, procedures and practices shall be consistent with the following. The District:

1. Will not ask about or document any student's legal immigration documentation status, or that of the student's family members.
2. Pursuant to the Family Educational Rights and Privacy Act (FERPA) and relevant law, will not disclose student educational records containing immigration or citizenship status without parental permission, court order, or other legal authority.
3. Will not permit law enforcement to access private areas of school property or take a student from school for the purpose of immigration law enforcement without parental permission, court order, or other legal authority.
4. To the maximum extent permitted by law, will require that any such court order or legal authority seeking student educational records, access to private areas of school property, or a student's removal from school be presented directly to the Superintendent's office for response with adequate notice so that the Superintendent or designee can ascertain legal validity of the request and obtain legal advice.
5. Will contact designated emergency contacts or appropriate state child protective services in the event that a student's parent or guardian is unavailable to provide for the student's care.

BE IT FURTHER RESOLVED THAT the Board of Directors of Eugene School District 4J directs the Superintendent to ensure that, within 90 days following adoption of this Resolution:

1. The District will review and strengthen as needed relevant policies, procedures, and practices, including those related to student enrollment practices, release of student records, and access to schools by law enforcement and other visitors, are, to the extent permitted by law, consistent with this Resolution and its intent.
2. District employees, including both administration and school-level staff, are provided with the necessary training to understand and follow the principles and practices supported and reaffirmed by this Resolution.
3. The District's policies, procedures, and practices that relate to support of all students, regardless of national origin, immigration status, or documentation status, are accessible by the District community, including students, parents and staff.

This Resolution is intended to be consistent with the District's legal obligations under federal and state law. Accordingly, this Resolution shall be interpreted as to not violate any requirement of federal or state law. Should federal or state law change so as to give rise to a conflict with any provision of this Resolution, such provision shall be of no further effect, and the remainder will continue to be valid and enforceable.

*We, the signatories indicated below, pass this Resolution based upon our personal belief that we have an individual responsibility to respond to the current political climate on behalf of District students, families and education professionals.*

Eugene School Board — Mary Walston, Chair • Eileen Nittler, Vice-Chair  
Anne Marie Levis • Jennifer Geller • Beth Gerot • Alicia Hays • Jim Torrey

*Unanimously approved by the Eugene School Board on February 15, 2017*



### The goal of today's training

- ▶ Know and apply 4J procedures
- ▶ Be able to teach others
  - ▶ Release of student information and records
  - ▶ Access to schools by immigration officials

### Are public schools required to provide education to undocumented students?

- ▶ <https://www.c-span.org/video/?c4587413/illegal-immigrants>

### U.S. Supreme Court: Yes, undocumented students have right to access public education

- ▶ Children ... "can affect neither their parents' conduct nor their own status."
- ▶ Education prepares children to become self-reliant and self-sufficient participants in society.
- ▶ A public school education inculcates fundamental values necessary to the maintenance of a democratic political system and provides the basic tools by which individuals might lead economically productive lives.



### Should, may or must employees ask a student questions about immigration status?

- ▶ May not. It is irrelevant to enrollment/attendance.
- ▶ Asking students about their immigration status when determining residency may discourage undocumented students from enrolling.
- ▶ OK to obtain residency (home address) information when enrolling.

### Should, may or must employees report an undocumented student to immigration enforcement?

- ▶ May not. Reporting a student's real or perceived immigration status to authorities would be one of the strongest steps a district could take toward denying the student access to an education.
- ▶ Reporting a student's immigration status could violate the Family Educational Rights and Privacy Act and other laws.

### Would the district ever have to release records to immigration officials?

- ▶ Only if directed by the superintendent.
- ▶ Decision may not be made at school level.
- ▶ The Family Educational Rights and Privacy Act (FERPA) generally prohibits school districts from providing third parties information about students contained in student records with the exception of a court order or subpoena (and advance notice to parents).
  - ▶ There is no blanket exception for law enforcement.

### What if immigration agents ask to interview students at school?

- ▶ Requests are to be referred to Superintendent's office
  - ▶ Decision may not be made at school level
  - ▶ District will work to prevent access to students at school sites for immigration enforcement
- ▶ Department of Homeland Security's "sensitive locations" policy is to generally avoid enforcement actions on school grounds, bus stops, education events.

### What if student's parent is detained?

- ▶ Must take steps to ensure the safety of children.
- ▶ Emergency contacts list.
  - ▶ Department of Human Services (541) 686-7722

### Scenario: Dealing with immigration officials at your building



- ▶ ICE agents show up in your building asking for student Ayaan Abad's personal information.
- ▶ The agent is dressed in black fatigues and is wearing a hat that reads ICE.
- ▶ When prompted, the agent displays her badge and a piece of paper listing all of the information she needs.
- ▶ She demands that you give her the needed information or produce the student for questioning.
- ▶ What do you do?

### Bill Smith is angry



### Scenario: Dealing with angry parents

- ▶ You just passed your building principal in the hallway. She is on her way to a meeting with a family.
- ▶ As you walk into the front office, you encounter an angry parent yelling at your school secretary.
  - ▶ Sam's dad, Bill, has heard a rumor that the Suarez family is undocumented and demands to know why his kid has to share a classroom with illegal aliens.
  - ▶ Bill demands to know why his tax dollars are used to support kids that belong in a different country.
  - ▶ Bill threatens to call the police and demands to have these parents arrested.
  - ▶ Bill is visibly upset. He is shaking and the building secretary looks shocked.
- ▶ What do you do?

## The Nguyen family is worried



## Scenario: Dealing with worried families

- ▶ Chai and Bao Nguyen are waiting in the main office of your building.
- ▶ They have just found out that their neighbors have been detained by ICE agents. Their neighbors' children, April and John, are 4<sup>th</sup> and 5<sup>th</sup> grade students in your building.
- ▶ Chai and Bao are here to notify you no one is able to collect April and John after school and the Nguyen family is leaving for California tonight.
- ▶ There are two potentially unsupervised students currently in your care.
- ▶ What do you do?

## What's next

- ▶ Procedures, policy review continues
- ▶ Principals train building staff on policies/procedures ASAP
- ▶ District is coordinating specialized job-specific training (e.g., for school secretaries, registrars)
- ▶ District is planning additional staff training
  - ▶ Social/emotional supports
  - ▶ Trauma informed care

## **Visitors to Schools and Properties**

The board values engaging the community in our schools and also recognizes that the safe and effective delivery of the district's educational program requires efficient and orderly classrooms and schools, a proper educational environment, and consideration for the safety and welfare of students and staff. Therefore, the district limits visitors to parents/guardians of current students; other family members of current students approved by the student's parent/guardian; participants attending school events open to the public; approved volunteers; district staff not currently assigned to that site; board members; and other persons approved by the superintendent or principal or designee for educational or official business purposes.

Without exception, visitors to a school during the school day will report first to the school office to obtain consent to visit elsewhere in the building. Any unauthorized persons will be reported to an administrator and may be asked to leave. The superintendent or principal or designee has the final authority to permit, deny or revoke the privilege of visiting a school based on the interests identified in this policy.

The superintendent may establish administrative rules implementing this policy. Visitors in violation of this policy or visitation rules are considered to be in violation of the law and are subject to prosecution for trespass.

END OF POLICY

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**Legal Reference(s):**

ORS 332.075  
ORS 332.107  
ORS 164.245  
ORS 164.255  
ORS 166.025