



**The Community Roots School Board Meeting**  
**Tuesday, October 6th, 2022 6:30**  
**p.m. 229 Eureka Ave. Silverton**

## Agenda

1. Call meeting to order – Sarah
2. Reading of Community Roots School Mission Statement – Jane  
(6:30)  
*Rooted in our local community, we learn in an authentic Montessori environment,  
growing as conscientious and joyful learners, inspired to lead in the world community.*
- Consent Agenda (6:35)
  - Approve September Meeting Minutes and Leadership/Board Retreat Minutes
- Audience with Visitors (Audience members may make comments to the board on any topic)  
(6:40)
- Administrator Report – Christen Kelly (6:45-6:55)
- Committee reports (Fundraising, Finance, Facilities) (6:55-7:05)
- Discussion Items and Actions (7:05-8:00)
  - 21-22 Annual Report Draft
  - Policy Updates - First Readings
    - EFA
    - EFA-R
    - GBEA
    - IGAI
    - JEA
    - JGAB
    - JHC
    - KBA
    - KBA-R

VISITORS: Meetings of the school board are for the members to conduct official school business. All meetings are open to the public, except executive sessions, which may be called according to Oregon law. Members of the public desiring to address the board are asked to contact the administrator at least one week in advance of the meeting. Large groups are asked to designate a primary spokesperson.



The Community Roots School Board Meeting  
Sep 6, 2022  
Draft Minutes

**Staff:** Ali, Christen

**Board Members:** Jackie, Matt, Jane, Virginia, Jen, Sarah

**Consent agenda:** Matt moves to approve, Sarah second, unanimously passed.

**Audience with Visitors:** Ali discussed the first day of the school year and said it was a success

**Administrator Report:** Christen said enrollment is at 93. Still looking for upper elementary and adolescent enrollment. Big first day. Lower elementary community roots guide added. Possibly schedule board meeting on another day than first day of school.

**Facilities:** Virginia spoke about an upcoming meeting for the facilities. Final inspection is set to go for the grange. Hopefully still on target for later this fall. Aiming for Oct 1st to move upper elementary and adolescent to Grange.

**Finance:** Jane outlined specific changes in the financial procedures. We are well below our projected enrollment (93) and our budget was passed expecting 110 enrollment. Christen will sit with the finance committee and rework the numbers and present it to the board.

**Fundraising:** Committee drafted letter in hopes that families will donate. Possibly re-branding the fundraising committee to PTO. Add 501(c)(3) tax deductible and when they might receive a receipt. Possibly special thank you in procedures for donations over \$1000. Promote Amazon smile more.

**Executive Session:**

**Fundraising Letter:** Add 501(c)(3) tax deductible and when they might receive a receipt. Possibly special thank you in procedures for donations over \$1000.

**Board Positions:** Sarah Brown - Board Chair, Jackie Kemp - Treasurer, Matt Eberle - Secretary - Jackie motions to approve, Matt seconds - unanimously passed  
Spoke about the upcoming leadership workshop and getting the agenda out to the public.

**Financial Policy & Procedures Manual** - Christen would receive bank statement and send to Jane and Jackie will independently verify bank statement. So an administrator can open bank statement and the treasurer can independently verify. Update the edits and get a clean copy of all the edits and approve. Purple edits only - Jackie moves to approve, Virginia seconds, unanimously passed

**Insurance Packet** - Possibly adding Director's coverage to the insurance - Christen will look into it. It covers both campuses. We reviewed insurance packet and all questions were addressed.

CRS Leadership/Board Meeting Minutes  
9/11/2022

**Attendance:**

**Board** - Jackie, Virginia, Sarah, Jane, Matt

**Staff** - Christen, Alison, Ginnie, Michelle, Alyssa, Hilary (phone), Bridgett

1. Introductions and Acknowledge Land

2. Strategic Priorities Review and History - In the past there was help from a Montessori consultant that came in to assess the school. They brought in multiple focus groups from the community, observed classroom operations and heard from staff. Much of the strategic process was done during COVID.

3. Discussed Priorities and consolidating the strategic plan into a simpler slimmed down version of the current plan.

- Main things to think about

1) Mission Statement Revision

2) Core Values - simplify

3) Taking out completed items that are still in the current strategic plan

4) Address main pressure points - 1) Time & Money, Student Enrollment, Staff Retention, Community Involvement (Internal and External)

5) Consolidate the multitude of categories into 3 core buckets (Engaged Community, Thriving Students and Staff, Wise Operations)



# The Community Roots School

## October 2022

# Administrator Report

Enrollment:

- Current: 91 students enrolled.

### 1. Enrollment

- a. We filled Lower Elementary with waitlisted students
- b. Space still available in K and grades 4-8

### 2. District Communication

- a. Bus transportation schedules have been posted online. There will be bus evacuation drills held in the beginning of October.
- b. School meals and menus are coordinated and communicated out on a monthly basis.
- c. Special Education department still has a posting out for an instructional aide for Christine Davis.
- d. School nursing continues to work with CRS for sick calls and medical protocols. Epi pen and medication administration training has been scheduled.
- e. IT department is currently working to finalize a few items for the Grange, namely the installation of a printer and finalizing the internet connection. Ceiling mounted projector & screen, and other electrical/connectivity needs have been completed.

### 3. Educational Accountability & School News

- a. SBAC scores have been received from the state, and ODE At A Glance profiles narratives have been submitted. ODE to publish profiles to the public in mid-October. Overall, scores across the board (local, state, national) have been lower than pre-pandemic times. CRS scores are down in Mathematics from those who opted in to State Testing last spring.
- b. Final Inspection for the grange will be scheduled for the week of October 3<sup>rd</sup>. A move-in date will be coordinated shortly after inspections pass.
- c. SPED IEP and 504 work continues with Christine Davis doing both push-in and pull-out services for students.
- d. Child Study meetings have begun and initial parent meetings + progress monitoring are ongoing.
- e. Strategic Priorities were reviewed with the Leadership Team and Board in a work session on September 11<sup>th</sup>, 2022. Next steps include road mapping and assigning tasks.
- f. CRS website continues to be updated to include updated staff and board bios + pictures.
- g. STAR assessments will once again be used throughout the year for students and have been assigned on the calendar.
- h. A Montessori and Mingle event is scheduled for October 6, 2022 from 5-7pm. This is hosted by Jess Fraley and Christen Kelly and will include information about Montessori education and our school.

### 4. Budget & Finances

- a. Christen met with Kim Doud at the Business office for a monthly review for SIA funds.
- b. Christen met with Steve Nielsen and Sharon Etzel for a year end budget review 2021/22, and ADM number projections have been estimated for 22/23
- c. All summer school spending has wrapped up by the Sept 30<sup>th</sup> deadline.
- d. All SIA spending for 21/22 has been recorded and accounted for.
- e. Currently, we are working on purchasing all the Auction items from the Giving Tree and Paddle Up. Those purchases will be used in this Fiscal Year and are reconciled on a monthly basis. We aim to have all purchasing complete by December 2022.
- f. A contribution letter was sent out to the community to encourage monthly, recurring donations as well as the fulfillment of volunteer hours.
- g. Our Outdoor program received a grant from Whole Kids Foundation (Whole Foods) for \$3,000.



5. **Community& Fundraising**
  - a. A family picnic and gear swap took place on September 25<sup>th</sup>
  - b. A Grange work party took place on September 17th
  
6. **Facilities**
  - a. A shed on the playground has been given to CRS from SFC to use for PE Equipment storage .We are grateful for the help and labor of skilled parent volunteers and staff members who helped make this structure useable for our school.
  - b. A Sensory Room space has been cleared and created in the main building for students to use as needed.
  - c. Much work has been put into getting the Grange move-in ready. Families and students have helped with garden and grounds clean-up, painting, and general projects. Final Inspection will be scheduled for the week of October 3<sup>rd</sup>. Middle school students have been connecting with the facility on Monday mornings.
  - d. Monthly facility meetings with SFC will resume in October.
  
7. **HR**
  - a. A new Lower Elementary Assistant has been hired. Gwen Hill will assist Michelle in the Hummingbirds classroom.

# **The Community Roots School**

## **Charter School Annual Report**

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**2021-22 School Year**

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## **Contents:**

1. CRS History and Summary of 2021-22
2. Mission Statement
3. Innovative Learning Environment, The Montessori Pedagogy Overview
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5. School Configuration and Enrollment
6. Policy Development Issues
7. Staffing and Professional Opportunities for Teachers
8. Student Opportunities, Learning, Achievements and Performance
9. Oversight Visits and Additional School Performance Data
10. Financials
11. Charter Contract Compliance Requirements
12. Goals Outlined in ORS 338.015
13. Accomplishment of Goals for 2020-21
14. Montessori

## **Appendices:**

1. Sample Student Report Card
2. ODE Report Card
3. 2021-22 Approved Budget
4. Budget Report End of the Year
5. 2021 Audit Financial Report

This annual report provides a comprehensive picture of the recently completed academic year, 2020-21. The annual report will be used by the Silver Falls School District to review the school's performance and progress for the past academic year.

## **1. CRS History and Summary of 2021/22**

The story began when parents in the Silverton community were introduced to the Montessori philosophy. The private elementary in a neighboring community closed and a small group of parents continued to dream big. They wanted their children to participate in a peaceful, child-centered educational system. Many parents in this small group embraced the Montessori philosophy but also struggled with the prospect of enrolling their children in private school for their elementary years. Other parents were very interested in the Montessori philosophy, but private school was not an option for their families.

Through discussions about a shared passion for the Montessori philosophy and a desire for a public school option, parents struck upon the charter school concept. After a few meetings over coffee, it was decided that the concept should be explored with other interested parents who shared the same passion. A meeting at The Home Place Restaurant was scheduled for December 2007, and it was there that the idea of The Community Roots School (CRS) was hatched. An application for a planning grant was submitted to the Oregon Department of Education in March 2008. In the spring of 2008, The Community Roots School was awarded a \$55,000 planning grant. With that approval came the potential for more than \$100,000 for each of the next two years for the implementation of the school.

This planning grant funded many activities over the next year including community meetings and outreach, consultation for the charter application to the school district, start-up materials for the school, and recruiting. Over 1,200 volunteer hours were needed to research, design and create a charter application. Support from other public charter Montessori schools, including Ridgeline and Lewis and Clark, was invaluable.

In November 2008, the founding members submitted their application for the charter to the SFSD Board. The founding members were as follows: Bart Banks, Jacquie Curtis, Jennifer de Jong, Jennifer Kimball, Erika Lanning, Jennifer McCord, Matt Miller, Sarah Miller, Frank Petrik, Mandy Petrik, Jennifer Traeger and Miranda Traeger.

During the school's eighth year of operation, our school moved into a new facility within the Silverton Friends Church. The move allowed the school to establish a sense of home for our community. We are offering a Garden Program and have vegetable gardens, native plant garden, chickens, and a compost bin at the main campus on Eureka. CRS offered Band, Art Instruction, after school Lego Robotics, and many other activities.

CRS had a middle school program consisting of 7<sup>th</sup> and 8<sup>th</sup> Grades. This unique Montessori model offers middle school/adolescent students the amazing opportunity to meet their developmental needs. The Erdkinder/adolescent program partnered with GeerCrest Farm and students milked goats, harvested and prepared/canned food, and participated in various other farm economic activities.



In 2021/22 CRS had 100 students in one Kindergarten classroom, two lower elementary classrooms (1<sup>st</sup> – 3<sup>rd</sup>), a combined upper elementary classroom (4<sup>th</sup> – 6<sup>th</sup>), and 1 Adolescent classroom (7<sup>th</sup> & 8<sup>th</sup>). CRS continues to explore the options of growth to include a Montessori Children’s house (inclusion of 3 and 4 year old students).

## **2. Mission Statement**

The CRS Board of Directors is purpose driven and guided by the mission statement created by the original group of founding members. The mission statement, which is read at the beginning of each board meeting, is as follows:

*“Rooted in our local community, we learn in an authentic Montessori environment, growing as conscientious and joyful learners, inspired to lead in the world community”.*

## **3. Innovative Learning Environment, the Montessori Pedagogy Overview**

Incorporating the Montessori philosophy into the public school system is challenging and must be handled delicately. Montessorians believe that the child develops and works at his/her own speed and chooses works according to his inner psyche.<sup>1</sup> The inner tug-of-war public Montessori teachers face daily is that of “teach to the test” vs. “follow the child”. Recognizing this tension, CRS has adopted three goals: 1) make sure that Montessori remains as authentic as we can make it within a charter setting, 2) ensure that teachers understand what is expected of students, and 3) ensure that every child receives help in attaining mastery of these skills.

During the 2021-22 school year, we maintained the classroom configurations (both online and in-person) that align with the recommendations laid out by Maria Montessori. The lower elementary classrooms contain grades 1-3 and upper elementary classrooms have grades 4-6. Students are grouped into these grade levels based on very sensitive developmental periods as well as the need for a three-year cycle. CRS is now offering a stand-alone Kindergarten, which is out of alignment with the multi-year Montessori methodology. CRS will look into the option of providing an authentic Montessori environment by including 3 and 4 year old options. The primary challenge with adding a preschool option is the lack of public funding. The Board is considering all possible options before committing to this option.

Each child’s progress through the Montessori curriculum is based on a proficiency model. Students will be able to move through the materials based on their ability to “master” their work. The teachers take very detailed records on each child’s progress through the materials. Lessons are taught in small groups based on their individual progress.

The classroom environment is an essential component to the success of the Montessori program. Maria Montessori spent years observing children and creating materials that meet the needs of the child’s various developmental needs. The materials are created as much as possible out of natural materials to help to create a respect and care for the items. The materials are placed on shelves that students can always be easily accessed as to nurture the child’s independence.

#### **4. Board of Directors**

The Community Roots School Board, for the 2021-22 school year, was composed of five members. Each board member is elected for two years. Officers of the board are elected at the annual meeting (usually in May or June).

##### 21-22 CRS Board Members:

###### Jackie Kemp – Chair

Jackie joined the CRS board in 2020, after learning about the school when she was managing the Charter School grants for the Oregon department of Education. Jackie is a graduate of the University of Hawaii West Oahu with a degree in Professional Studies, in 2001 she completed a Masters of Arts in Curriculum and Administration for Education at Gonzaga University. In 2016 Jackie and her husband Greg relocated to Silverton from the windward side of Oahu, Hawaii. Jackie is passionate about education, and that every child should be given the opportunity to develop a lifelong enjoyment of learning and discovering about the world around them.

###### Jason Wagoner – Treasurer

Jason joined the CRS board in 2014, taking on the role of treasurer two years later. Jason is a graduate of Southern Oregon University with degrees in both Biology and History. In 2006, along with his wife, Melissa, Jason moved to Silverton to work for the Oregon Parks and Recreation Department. Over the past 13 years, the couple has fallen in love with the Silverton community and, as their family has grown, have enjoyed taking an interest in their children's education. Having served as a board member for the past six years, Jason has had the opportunity to watch the school grow and has found this both challenging and rewarding. The mission of Community Roots School and opportunity to provide its students with a quality education has been a rewarding experience.

###### Jennifer (Jen) De Jong - Secretary

Jennifer is a founding member of Community Roots School and is the current Board Secretary and Co-Chair. She holds a B.S in Psychology and works as a Project Director with the Department of Human Services, Modernization Initiative. She was introduced to Montessori education in 2006 and was instantly attracted to the concepts of child-centered education, fostering a child's joy of learning and the prospect of inspiring social change through education. She has been a part of many accomplishments and lessons that CRS has encountered and is committed to the mission and the determination to provide this as an option to our wonderful community. Jennifer and her husband, Jeff Reilly, have three girls. Each of her girls had attended Community Roots. She currently has one at Silverton High School and another at Silverton Middle School.

###### Virginia Griffin – Board Member

Virginia brings experience starting and helping to run a nonprofit Montessori Primary program (ages 3-6) at Silver Creek Montessori, as well as professional background as an attorney. Virginia attended Montessori schools from age 2.5 through 13 and attributes her later academic success and love of learning to her Montessori experience. She is passionate about Montessori education, and wants to help with the work of bringing an opportunity for free authentic Montessori education to every child in the Silver Falls School District.

Shannon (Iris) Wilson – Board Member

Jane Zhen - Board Member

### *Board Meetings*

The Community Roots School Board meets on the first Tuesday of each month at 6:30 p.m. at the CRS campus or held online. Special meetings are scheduled as necessary. Each meeting is conducted using Robert’s Rules of Order and includes noting attendance, reading of the Mission Statement, approving the consent agenda, asking for audience comments, a financial report, voting on action items and adjourning.

### *Board Training and Development*

Continuing the tradition established in 2012, the board had recognized the importance of continuous board training and designates the first half hour of many board meetings to board training, including journal reviews, team building and further education. As well, board development meetings are held on alternate dates as well. Topics covered in board trainings included finance, board orientation, and various other trainings (DEI, OSBA).

## **5. School Configuration and Enrollment**

100 children were enrolled in six classrooms. CRS had a stand-alone Kindergarten. There are 2 lower elementary classrooms with a combination of 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> grades. The upper elementary classrooms are a combination of 4<sup>th</sup>, 5<sup>th</sup>, and 6<sup>th</sup> grades. The adolescent program is its own standalone classroom of 7<sup>th</sup> and 8<sup>th</sup> grade students. Budgetary modifications were made to ensure limited effect on the learning environment for the students.

### *Enrollment for 2021-22*

Enrollment forms for 2021-22 met our expectations with interest from both in-district and out-of district, resulting in a lottery. The lottery process allowed students to be placed in slots on the waitlist at random. The lottery process was aligned with distinct guidelines. After the lottery, intent to enroll forms were received from 27 students for the 2021/22 academic year. Outreach was conducted by word of mouth and street banners in town. The school continues to attract families from out of state and other communities who choose to relocate to Silverton.

## **General School Day Schedule 2021/22**

CRS resumed full day in-person learning for all students for the 2021-22 school year.

<b>7:50</b>	Bus Arrives
<b>7:50-8:15</b>	Early Morning Care for students arriving by bus
<b>8:00</b>	Middle School instruction begins
<b>8:15-8:30</b>	Students Arrive
<b>8:30</b>	Morning three hour work cycle & instruction
<b>11:30 - 12:30</b>	Lunch and Recess
<b>12:45-3:15</b>	Afternoon work cycle & instruction
<b>3:15</b>	School day ends - children dismissed to car line, bus, or walking.

Community Roots largely follows the SFSD calendar, including in-service days, conferences, breaks, and holidays. Community Roots has an early release (noon dismissal) every Monday that school is in session. Monday afternoons are reserved for professional development, meetings, lesson planning and recordkeeping for staff.

## 6. Policy Development

As of 2015, CRS had adopted charter school policies from The Oregon School Board Association. The policies are reviewed based on guidance from OSBA and revised and adopted by the CRS board. The school subscribes to the OSBA policy updates and reviews policies each month to remain current and relevant. The board policies can be located through the OSBA policy site. The Community Roots School's financial committee has its own Fiscal Policies and Procedure Manual and our charter adheres to the SFSD policies and procedures surrounding billing, payroll, personal files, and other SFSD provided services.

**2015** – The board adopted a complete package of OSBA charter school policies. These policies are available on the OSBA policy site. CRS board reviewed and approved a 5-year budget and released our 16-17 budget to SFSD. The strategic plan was reviewed and adopted as a working document.

**2016** – The CRS board reviewed and updated OSBA policies.

**2017** – CRS purchased, reviewed and implemented the OSBA charter school student and staff handbooks.

**2018 - 2020** – Handbooks and policies were updated to better align with the desired school culture.

CRS policies are found online: <http://policy.osba.org/commrt/index.asp>

## 7. Staffing and Professional Opportunities for Teachers

For the 2021-22 school year, staff included five full time teachers, 6 part time assistants, a full time administrator, and a part time office manager. Ali Wigowsky led our Kindergarten classroom and she has a public school and Waldorf school educational background. Hilary Conroy is one of the lower elementary teachers working with students in grades 1–3. Hilary comes to CRS with public school training as well as lower elementary Montessori training. Michelle Bryntesen is the school’s other lower elementary teacher and has previously worked at CRS as a classroom assistant for a number of years, and also holds a Diploma from CGMS in Montessori elementary. Ginnie Vigansky continued at CRS as an Upper Elementary teacher, having previously taught at a Montessori school in Corvallis. Ginnie holds an AMI diploma in Montessori Elementary education, and an Oregon Charter school registry with TSPC. Bridgett Steveson guides our middle school program. She has Montessori certification for the Adolescent level, and an Oregon charter school registry with TSPC. Ylai Leon was hired as an AMI trained elementary teacher for Upper Elementary, but departed the school in October 2021.

Each classroom was staffed with a part time assistant for 7.5 hours a day. Upper Elementary became a combined classroom under Ginnie Vigansky after Ylai Leon departed in October 2021, and retained the 2 assistants. Our garden specialist, Alyssa Burge, divided her time between the outdoor educational environment and working as needed with students in other classrooms. Assistants were in charge of aiding children in problem solving, monitoring behavior, and working with children while the teacher was providing lessons to small groups or individual students. Christen Kelly returned as the Administrator. Flo Pearson continued as the Office Manager. SpEd intervention support was supported by staff members Heather Swigart and Jess Saunders.

## **8. Student Opportunities, Learning, Achievements and Performance**

The math, language, science and history curricula at CRS offer hands-on materials for the child. Follow-up work assignments, using materials from teacher-guided lessons, enable the child to work at his/her own pace. Materials allow students to work independently and at the advanced levels of ability due to the control of error built within the material.

The Montessori classroom provides choices of learning opportunities for students. Students are given lessons on a daily basis and are assigned work to complete. Each work is added to the child’s plan and the teacher monitors how and when the child completes this work. It is a choice for the child within their workday, but is a work that will need to be completed within the week. Student progress is carefully monitored throughout the year.

The Montessori student is responsible for working independently, but teachers, parents and students all benefit from work plans and accurate reporting. Work plans are sent home to parents at the teacher's discretion so they are aware of their child’s progress. The board and staff focused on measuring academic achievements throughout the year.

The administrator and teachers worked through developing processes to accurately track student performance and achievement appropriately for *public* Montessori classrooms. CRS uses an

online record keeping system, Transparent Classroom. Not only does it track the Montessori progression, but the Common Core Standards that are taught as well. Appendix 1 is an example of a student report card from CRS. Students were routinely assessed throughout the year using the district's STAR assessment. It has been found to be a helpful assessment tool.

Student report cards, assessment forms, progress reports, student information and work plans will inform parents and students of their progress. Further, in the Montessori environment, anecdotal records and informal assessments enable teacher assessment at any given moment to determine a student's level and ability within a material and/or concept. These innovative measurement tools are required and imperative to the success of charter schools. CRS reconfigured the progress reports to include the Common Core Standards. During the shift in learning transitioning out of COVID times, modifications were made to incorporate more SEL narratives as well.

Highlights of the children's year included returning to campus for full-time in person instruction, making connections with peers, teaching staff, and their indoor/outdoor environments, Recharge Cafe, Trivia Night, and the Middle School performance of *Macbeth*. The year concluded in June with field day, family picnic, and the annual Moving Up Ceremony celebrating students as they move from one grade to the next, with a special focus on the "senior" students in each class who are recognized as school leaders. A graduation ceremony was held outdoors for our 8<sup>th</sup> grade students who were moving up to the High School.

In late spring, the children resumed SBAC testing. The testing scores indicated strength in our student's ability to take the Language portion of the SBAC. The CRS staff spends countless hours preparing students for the LA section of the SBAC with a focus on the new writing requirements. The SBAC results for the 2021-22 school year shows room for growth in the area of mathematics. CRS staff will be utilizing data from the STAR assessment to provide feedback to staff in areas of individual growth as we prepare for SBAC. For specific questions regarding the ODE report card, please contact Christen Kelly.

CRS was able to retain specialty teachers. This was made possible by the amazing efforts of many parent volunteers on our fundraising committee. All students had the opportunity to engage in the garden with Alyssa Burge, our outdoor/garden specialist.

## **9. Oversight Visits and Additional School Performance Data**

The Community Roots School Administrator, Christen Kelly, was slated to present the 2020-21 Annual Report to the Silver Falls School District Board in January of 2022 to update them on the school's progress, however, the presentation was bumped from the agenda for that month and had not been rescheduled. As part of its sponsor responsibilities, members of Silver Falls School District staff made monitoring and technical assistance visits throughout the school year. The sense of collaboration between the district and the school continues with a strong foundation to quickly address issues as they arise and to ensure appropriate oversight and accountability.

With the aid of SIA funds, CRS has been able to contract with multiple agencies to provide support and professional development for the school. In 2021/22 CRS had a DEI consultant, Christine Moses of Buffalo Cloud Consulting, that supports the Staff and Board to use an equity lens in decision making processes, create culturally responsive learning environments, examine implicit biases, and dismantle aspects of white supremacy culture within ourselves and our community. BCC did this through observations and providing staff feedback, staff PD in the area of Anti-Racism utilizing the book *This Book Is Antiracist*.

CRS also has contracted out with the National Center for Montessori in the Public Sector to assess the school utilizing the Essential Elements Rubric for Public Montessori Schools. This assessment comes with recommendations for school improvement and support from Seth Webb. CRS continues to use DERS (Developmental Environment Rating Scale) to assess classroom learning environments on a regular basis.

## **10. Financials**

### *Budgets*

In April 2021, Community Roots School submitted its SSF operational budget, for the 2021-22 school year, to the Silver Falls School District. CRS also has a Supplemental School Operations Budget that is also referred to as our Fundraising budget in a separate checking account. That budget was proposed to the CRS board and approved in the Winter of 2021.

Approved budgets are attached in Appendices 3 and 4.

### *Fiscal Management*

In 2011, the Community Roots School board created a Finance Committee made up of one (or more) community members, a board member, and the administrator. The Finance Committee is charged with previewing budgets and monetary decisions in an effort to more efficiently manage finances at the board level. All pertinent decisions must be voted on by the board, but the Committee foresees questions and issues. The Community Roots School board has an adopted Fiscal Policy and Procedures, and this document is reviewed and approved annually. This document outlines appropriate and extremely detailed practices. The board designated Treasurer - Jason Wagoner, Administrator – Christen Kelly, Community Member - Irene Schmuker, Board Member – Jackie Kemp, and Parent Volunteer – Troy Barney were charged with the oversight of the school's finances for the 21-22 school year.

Financial oversight of our fundraising account is described in the board approved Fiscal Policies & Procedures Manual. A part time bookkeeper manages the "fundraising account" which is held at Citizens Bank in Silverton.

For the 2021-2022 school year, Silver Falls School District acted as the fiscal agent for the State School Fund funds. Community Roots School maintains a checking account, the "fundraising account", to maintain its fundraised funds for the year. The State School Fund was accounted for through the district's accounting software, iVisions, and fundraised activities are accounted for through QuickBooks. Reports were created monthly for review by the finance committee and

then for board approval for all streams of funds. Attached in Appendix 4 are the year-end financials for the school.

#### *Grant Writing*

CRS was approved for a substantial Expansion Grant through the Oregon Department of Education. CRS was awarded for a 2 year period, \$449,510. The CRS board had provided oversight of the use of these funds. The grant closed out in December 2020.

Goal #1: Complete K-8 Alignment and comprehensive Adolescent curriculum & materials

Goal #2: Fully Equipped Authentic Montessori Adolescent Classroom

Goal #3: Land based Economic Production and Farm Occupation equipment

Goal #4: Improving Outcomes for Historically Underserved Students

Goal #5: Highly Trained Montessori Staff

#### *Fundraising*

The CRS Fundraising Committee consists of a group of CRS parents, and staff. Fundraising events were diverse in 2021-22 and an estimated \$68,768.89 was raised by the fundraising committee. In 2021-22 fundraising dollars were expected to contribute to areas of need such as classroom materials, the outdoor program, and facilities. The paddle up from the annual auction in the Spring of 2022 funded an external storage unit, a sensory room and library area for students and a staff room.

Fundraising efforts include wreath and Poinsettia sales, Giving Tuesday, purchasing ability through Amazon Smile, Box Tops for Education, blue bag bottle drop, annual auction, and a plant sale.

#### *Audit*

CRS participated in a fiscal audit as required. The third-party auditor will produce a Financial Statement. Pauly, Rogers & Co. is in the process of finalizing the audit for the SFSD. Information is attached in Appendix 5.

## **11. Charter Contract Compliance Requirements**

The following goals were outlined in our initial Charter Contract.

#### *High Academic Achievement*

Community Roots School follows the Oregon and federal curricular requirements.

#### *Social Growth and Emotional Development*

Montessori students realize the non-academic outcomes of the Montessori philosophy, such as respect for self, others, and the environment, self-motivation, and self-reliance. This builds on their ability to work independently in an environment that requires students to solve problems and rely on each other to work through materials. Those who observe the classrooms will see these outcomes occurring on a daily basis.

#### *Strong Links with the Community*



The first line of Community Roots School’s mission statement is, “Rooted in our local community.” We hosted several fundraising activities that brought the community and school together including a plant sale fundraiser (with flowers, veggie starts, and trees from our school garden that the children prepared, as well as hanging baskets from a local nursery), a holiday wreath sale, and a successful annual Auction. Our middle school students also hosted Trivia Night.

The upper elementary students held a fundraiser, Pennies for Patients, to help support children through the Leukemia & Lymphoma Society.

The in-town location has allowed our classrooms to move outside. Once in Hybrid mode in the Spring, classes took multiple walking trips to the park, and worked in the garden. Our upper elementary students’ “going out” program, which allows our 4<sup>th</sup> – 6<sup>th</sup> graders learning opportunities outside the classroom, was put on hold during the 2020/21 school year due to COVID.

#### *Successful Montessori Program*

Creating an authentic Montessori environment is part of the CRS Mission. Through continuous education of the staff, parents and children, we strive to achieve authenticity. CRS has hired Montessori certified teachers and implemented the Montessori curriculum. Staff pursue ongoing professional learning to strengthen their Montessori implementation in the school. With the ODE Expansion Grant in the 18-19 school year, there was a renewed plan for a needs assessment and evaluation of our current mission of an Authentic Montessori model. Focus groups were held with parents, staff, and board members and an in depth look at our Montessori classrooms, policies, and practices were completed by the National Center for Montessori in the Public Sector (NCMPS). In the 2020-21 school year, staff and board took the information from the report and began creating a strategic plan of support and accountability.

#### *Active Parent Participation*

Community Roots Parents show commitment to the school and their children’s education and contribute in many capacities. Parent participation was encouraged through community education events, meetings with teachers, community building events and fundraising events. Community education events included virtual Family Engagement sessions where staff introduced Montessori concepts and curriculum to family members. Community building events included a student-led Trivia night and play performance.

Parents were also encouraged to support their child’s learning online, as well as attend the bi-annual parent-teacher conferences. Fundraising and Community Building events often coincide and range from a plant sale to our annual auction.

## **12. Goals outlined in ORS 338.015**

The Community Roots School is consistent with all of the goals outlined in ORS 338.015. To avoid redundancy, this report has been adapted in order to describe in detail how these goals are being achieved. Below one will see how these goals have been adapted in this report.

*A: Increase student learning and achievement*

Section 8. Student Opportunities, Learning, Achievements and Performance

*B: Increase choices of learning opportunities for students.*

Sections 8. Student Opportunities, Learning, Achievements and Performance

Section 11. Charter Contract Compliance Requirements: *High Academic Achievement*

*C: Better meet individual student academic needs and interests.*

Section 11. Charter Contract Compliance Requirements: *High Academic Achievement*

*D: Build stronger working relationships among educators, parents and other community members*

Section 11. Charter Contract Compliance Requirements: *Stronger Links with the Community and Active Parent Participation*

*E: Encourage the use of different and innovative learning methods*

Section 3. Innovative Learning Environment, The Montessori Pedagogy Overview

*F: Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools*

Section 3. Innovative Learning Environment, The Montessori Pedagogy Overview

Sections 8. Student Opportunities, Learning, Achievements and Performance

*G: Create new professional opportunities for teachers*

Section 7. Staffing and Professional Opportunities for Teachers

*H: Establish additional forms of accountability for schools*

Section 8. Student Opportunities, Learning, Achievements and Performance

*I: Create innovative measurement tools.*

Section 8. Student Opportunities, Learning, Achievements and Performance

### **13. Accomplishment of Goals for 2020-21**

The Community Roots School Board engaged in an annual assessment of our Montessori principles. The CRS board utilized a tool by the National Center for Montessori in the Public Sector. Each year staff, board and administration rate the school and create goals for the next school year.

The 20-21 school year included Seth Webb, a Montessori consultant from NCMPS, supporting our staff with the results of the previous year's audit. In 19/20 he conducted an audit of our school utilizing the DERS observation tools, EER (Essential Elements Rubric) a Montessori assessment Rubric, and input from the CRS staff and board. The audit identified some concrete work that CRS is working to adopt. CRS administration has established a leadership team for the first time in 2018 and that group of CRS guides meets monthly to work on the goal of the EER. This work will continually be supported by Seth Webb and The National Center for Montessori in the Public Sector. In 20/21 he conducted SWOT focus groups with our school community and supported us in developing a draft of our Strategic Plan priorities for CRS. Our school continued these procedures and practices for the 20-21 school year:

1) Child Study – in depth study by a team

- 2) New Progress Reports – Focus on Social/Emotional Fluency, Executive Functions, and Critical Thinking Skills
- 3) Normalization/Adjustment Checklist (adapted for Online/Hybrid learning)– ability of a child to access Montessori curriculum
- 4) Montessori Assistant Training for every assistant
- 5) All guides will be Montessori Trained

#### **14. Montessori Resources**

**1. Schaitel, Nancy.** “Charter schools and Montessori: A marriage of opposites” Public School Montessorian, Fall 2012, V25,1.

**2. Lillard, Angeline Stoll.** Montessori: The Science Behind the Genius. New York: Oxford University Press. 2005.

**2. Lillard, Paula P.** Montessori Today. New York: Random House. 1996.

**3. The Montessori Elementary Program** North American Montessori Teachers Association. [http://www.montessori-namta.org/Index.php?option=com\\_content&view=article&id=87](http://www.montessori-namta.org/Index.php?option=com_content&view=article&id=87). Retrieved 10/01/11.

**4. Montessori, Maria** (1969). "The Four Planes of Development". *AMI Communications* (2/3): 4–10.

**5. Grazzini, Camillo** (Jan/Feb 1988). "The Four Planes of Development: A Constructive Rhythm of Life". *Montessori Today* **1** (1): 7–8.

**6. Montessori, Maria** (1994). *From Childhood to Adolescence*. Oxford, England

# Appendix 1

Sample Student Report Card

# The Community Roots School

2021 - 2022

## Elementary Progress Report

Student's Name: \_\_\_\_\_

Days Present: \_\_\_\_\_

Teacher's Name: \_\_\_\_\_

Days Absent: \_\_\_\_\_

### Social, Emotional, & Executive Development

Grade Level: \_\_\_\_\_

Social Fluency & Emotional Flexibility	Nov.	March	June	Social Fluency & Emotional Flexibility	Nov.	March	June
Shows Gratitude				Shows empathy for plants and animals			
Accepts responsibility for actions				Sensitive to environmental impact			
Speaks and listens with understanding and respect				Manages frustration and conflict with flexibility			
Interacts cooperatively/collaboratively with peers				Maintains healthy habits			
Interacts appropriately with adults				Contributes as a community member			
Shows empathy towards others				Models Integrity; is truthful in actions and words			
Executive Functions	Nov.	March	June	Executive Functions	Nov.	March	June
Demonstrates initiative				Manages impulses			
Makes appropriate work choices				Transitions between activities smoothly			
Sustains appropriate focus during work				Seeks help when needed			
Persists and follows work through to completion				Embraces and pursues challenges			
Follows multi-step directions				Uses time effectively			
Critical & Creative Thinking	Nov.	March	June	Critical & Creative Thinking	Nov.	March	June
Tolerates uncertainty				Challenges assumptions			



# The Community Roots School

2021 - 2022

Measurement & Data							Cultural Studies and the Sciences:  Cultural Studies- Human studies, physical place Life Sciences- Botany, Zoology Physical & Earth Sciences- experiments, land and water Outdoor School- based on what Alyssa is seeing
Problem Solving & Reasoning							
Geometry							
Research Skills & Presentations							
Cultural Studies (History & Geography)							
Life Sciences							
Physical & Earth Sciences							
Outdoor School							

Comments:

# Appendix 2

## ODE Report Card

(As of 10/1/22 ODE Report Card has not yet been published. CRS will provide copies to SFSD when it has been released.)



# Appendix 3

2021 – 2022 Approved Budget

**760 - State School Support Fund**

<b>REVENUE:</b>			
760-3101-00	123 enrolled (126.5 ADMw)	State School Fund—General Support	\$891,855
	251 Fund	SIA Funds	\$81,600
760-1760-00		Supplemental from Fundraised/School related account	\$26,150
<b>TOTAL REVENUE</b>			<b>\$999,605</b>

<b>EXPENSES:</b>			
1000			
	<b>1111- K-5 Instruction</b>		
	760-1111-111-142-00-00	Certified Salaries	221,827
	760-1111-112-142-00-00	Classified Salaries	99,158
	760-1111-117-142-00-00	Unused Leave	5,250
	760-1111-124-142-00-00	Temporary Classified - Lego - ESL	3,000
	760-1111-211-142-00-00	PERS - Employer Contribution	44,185
	760-1111-213-142-00-00	PERS - Employer Contribution	26,187
	760-1111-220-142-00-00	Social Security Admin - FICA/Medicare	24,353
	760-1111-231-142-00-00	Workers' Compensation	\$1,749
	760-1111-240-142-00-00	Contractual Employee Benefits	39,054
	760-1111-311-142-00-00	Certified Substitutes	8,000
	760-1111-312-142-00-00	Classified Substitutes	4,000
	760-1111-410-142-00-00	Consumable Supplies (\$400/class)	\$1,733
	<b>1111 - Totals</b>		<b>\$478,496</b>
2000			
	<b>1121- 6-8 Instruction</b>		
	760-1121-111-142-00-00	Certified Salaries	86,501
	760-1121-112-142-00-00	Classified Salaries	39,168
	760-1121-211-142-00-00	PERS - Employer Contribution	18,472
	760-1121-213-142-00-00	PERS - Employer Contribution	10,908
	760-1121-220-142-00-00	Social Security Admin - FICA/Medicare	9,917
	760-1121-231-142-00-00	Workers' Compensation	\$705
	760-1121-240-142-00-00	Contractual Employee Benefits	15,021
	760-1121-410-142-00-00	Consumable Supplies (\$400/class)	\$677
	<b>1121 - Totals</b>		<b>\$181,370</b>
	<b>2220 - Educational Media</b>		
	760-2220-000-142-00-00	Distance Learning Platform	\$10,000
	<b>2220 Totals</b>		<b>\$10,000</b>
	<b>2240 - Instructional Staff Development</b>		
	760-2240-000-142-00-00	Instructional Professional/Tech (Staff/Curriculum Develop)	\$4,000
	<b>2240 Totals</b>		<b>\$4,000</b>
	<b>2310 - Board of Education Services</b>		
	760-2310-380-142-00-00	Non-Instructional - OSBA	\$2,000
	760-2310-410-142-00-00	Consumables - printing annual reports	\$500
	760-2310-650-142-00-00	Insurance and Judgements	\$5,500
	<b>2310 - Totals</b>		<b>\$8,000</b>

<u>2490 - Other Support SVCS - School Adm</u>			
	760-2490-112-142-00-00	Classified Salaries (Office Manager)	24,908
	760-2490-113-142-00-00	Administrators Salaries	123,542
	760-2490-121-142-00-00	Certified Substitutes	1,500
	760-2490-240-142-00-00	Contractual Employee Benefits	\$16,800
	760-2490-211-142-00-00	PERS - Employer Contribution	\$17,979
	760-2490-213-142-00-00	PERS - Employer Contribution	\$10,513
	760-2490-220-142-00-00	Social Security Admin - FICA/Medicare	\$11,256
	760-2490-231-142-00-00	Workers' Compensation	\$809
	760-2490-410-142-00-00	Consumable Supplies & Materials & (staff gear)	\$5,544
	760-2490-640-142-00-00	Dues & Fees - STAR, TP, Copier, Bookkeeper	\$13,040
	<b>2490 - Totals</b>		<b>\$225,891</b>
<u>2520 - Fiscal Services</u>			
	760-2520-231-142-00-00	Workers' Compensation - whole school	\$2,500
	760-2520-380-142-00-00	Non-Instructional Professional & Technical Svs (Audit)	\$7,500
	<b>2520 - Totals</b>		<b>\$10,000</b>
<u>2540 - Operations &amp; Maintenance</u>			
	760-2540-320-142-00-00	Property Services (Rent SFC & Grange)	\$57,240
	760-2540-321-142-00-00	Property services (Custodial)	\$7,500
	760-2540-327-142-00-00	Property services (Utilities)	\$1,228
	760-2540-410-142-00-00	PPE & Cleaning Supplies	\$5,000
	760-2540-328-142-00-00	Property Services (Garbage)	\$1,272
	<b>2540 - Totals</b>		<b>\$72,240</b>
<u>2550 - Student Transportation Services</u>			
	760-2550-330-142-00-00	Student Transportation Services	\$1,000
	<b>2550 - Totals</b>		<b>\$1,000</b>
6000			
<u>6000 - Contingencies</u>			
	760-6000-810-142-00-00	Planned contingency	\$11,148
		Ending fund balance set aside for reserve fund	\$5,351
	<b>6000 - Totals</b>		<b>\$16,499</b>
<b>EXPENSE TOTALS</b>			<b>\$1,007,496</b>
<b>Revenue less Expenses</b>			<b>-\$7,891</b>

# Appendix 4

End of the Year Budget Reports

# Appendix 5

2021 -2022 Audit Financial Report

(As of 10/01/22 – Audit Reports have not been received. CRS will provide copies to SFSD when those have been completed and returned.)

The Community Roots School  
Statement of Financial Activities  
As of 8/31/2022

Description	Actual	Budget	Actual vs. Approved Budget	Actual	Actual	Actual	Actual	Actual
	SSF General Funding	Approved Budget - General Funding		SIA Funding *	ESSER II Funding	ESSER III Funding	Citizen Bank	Total
Club Fund Raising	-	36,051.00	(36,051.00)	-	-	-	-	-
State School Fund—General Support	199,528.63	798,114.00	(598,585.37)	-	-	-	-	199,528.63
BEGINNING FUND BALANCE	-	96,452.00	(96,452.00)	-	-	-	-	-
SIA Funds	-	-	-	-	-	-	-	-
ESSER II	-	-	-	-	-	-	-	-
ESSER III	-	-	-	-	-	-	-	13,000.00
Grants	-	-	-	-	-	-	-	-
Fundraising	-	-	-	-	-	-	2,785.00	2,785.00
Supply Fees	-	-	-	-	-	-	-	-
<b>Total Revenue</b>	<b>199,528.63</b>	<b>930,617.00</b>	<b>(731,088.37)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>2,785.00</b>	<b>215,313.63</b>
Salaries	(15,453.82)	(539,877.00)	524,423.18	-	-	-	-	(15,453.82)
Substitute & Temporary Wages	-	(13,500.00)	13,500.00	-	-	-	-	-
Benefits	(5,669.50)	(151,730.00)	146,060.50	-	-	-	-	(5,669.50)
PERS	(1,983.33)	(82,004.00)	80,020.67	-	-	-	-	(1,983.33)
Computer Expenses	(1,008.00)	(8,500.00)	7,492.00	-	(1,528.77)	-	-	(4,065.54)
Consumable Supplies and Materials	(1,683.46)	(13,100.00)	11,416.54	-	-	-	-	(1,683.46)
Dues and Fees	-	(12,080.00)	12,080.00	-	(1,300.00)	-	-	(2,600.00)
Insurance	(7,116.00)	(7,500.00)	384.00	-	-	-	-	(7,116.00)
Professional Development	-	(5,164.00)	5,164.00	-	-	-	-	-
Professional Services	-	(16,000.00)	16,000.00	-	-	-	-	-
Rent	(637.60)	(55,000.00)	54,362.40	-	(1,055.25)	-	-	(2,748.10)
Rental - Other	(268.20)	(3,750.00)	3,481.80	-	-	-	-	(268.20)
Repairs and Maintenance	-	-	-	-	-	-	-	-
Transportation	-	(1,000.00)	1,000.00	-	-	-	-	-
Utilities	(691.72)	(6,100.00)	5,408.28	-	-	-	-	(691.72)
Other Expense	-	-	-	-	-	-	(5,135.00)	(5,135.00)
Planned Reserve	-	(15,312.00)	15,312.00	-	-	-	-	-
<b>Total Expense</b>	<b>(34,511.63)</b>	<b>(930,617.00)</b>	<b>896,105.37</b>	<b>-</b>	<b>(3,884.02)</b>	<b>-</b>	<b>(5,135.00)</b>	<b>(47,414.67)</b>
<b>Net Revenue (Expense)</b>	<b>165,017.00</b>	<b>-</b>	<b>165,017.00</b>	<b>-</b>	<b>(3,884.02)</b>	<b>-</b>	<b>(2,350.00)</b>	<b>167,898.96</b>
<b>Citizens Bank Balance</b>							<b>161,367.06</b>	

Reserve Designations	2020-21 Actual		2021-22 Budgeted
Assigned	\$83,000	Total in SSF Reserve	\$83,000
Assigned	\$46,756	Reserve - roll over - Fundraising group	\$46,756
	\$4,000	Play ground Donation	\$4,000
	\$105,625	Contingency Roll-Over	\$105,625
Restricted	\$29,692	Reserve - CRS Longevity Fund	\$29,692
	\$269,073	Total Reserves	\$269,073

citizens bank

# OSBA Model Charter School Sample Policy

Code: EFA  
Adopted:

## Local Wellness

The public charter school is committed to the optimal development of every student and believes that a positive, safe and health-promoting learning environment is necessary for students to have the opportunity to achieve personal, academic, developmental and social success.

To help ensure students possess the knowledge and skills necessary to make healthy choices for a lifetime, the administrator shall prepare and implement a comprehensive nutrition program consistent with state and federal requirements for public charter schools sponsoring the National School Lunch Program (NSLP) and/or the School Breakfast Program (SBP). The program shall reflect the Board's commitment to providing adequate time for instruction that fosters healthy eating through nutrition education and promotion, serving healthy and appealing foods at the school, developing food-use guidelines for staff and establishing liaisons with nutrition service providers, as appropriate.

### POLICY IMPLEMENTATION, MONITORING, ACCOUNTABILITY AND COMMUNITY ENGAGEMENT

#### Implementation

The public charter school shall manage and coordinate the implementation of this local wellness policy. The implementation will consist of, but not be limited to, the following:

1. Delineating roles, responsibilities, actions and timelines specific to each school;
2. Generating and disseminating information about who will be responsible to make what change, by how much, where and when;
3. Establishing standards for all foods and beverages provided (but not sold) to students during the school day on participating school campuses;
4. Establishing standards and nutrition guidelines for all foods and beverages sold to students during the school day on participating school campuses that meet state and federal nutrition standards for NSLP and SBP, competitive foods, permit marketing of same that meets the competitive food nutrition standards, and promotes student health and reduces child obesity; and
5. Establishing specific goals for nutrition promotion and education, physical activity[, physical education] and other school-based activities that promote student wellness.

The Board designates the administrator to be responsible for ensuring each school meets the goals outlined and complies with this policy.

#### [Record Keeping

The public charter school will retain the following records to document compliance with the local wellness policy requirements at the public charter school’s administrative offices:

1. The written local wellness policy;
2. Documentation to demonstrate the policy has been made available to the public;
3. Documentation of efforts to review and update the local wellness policy, including an indication of who participates in the update and the methods the public charter school uses to make stakeholders aware of their ability to participate;
4. Documentation to demonstrate compliance with the annual public notification requirements;
5. Documentation of the school’s most recent assessment on the implementation of the local wellness policy;
6. Documentation to demonstrate the most recent assessment on the implementation of the local wellness policy has been made available to the public.]

### **Notification of Policy**

The public charter school will inform the public about the content and implementation of the local wellness policy, and post the policy and any updates to the policy on the school website annually. Included will be, if available, the most recent assessment of the implementation, and a description of the progress being made in attaining the goals of the policy.

The public charter school will publicize the name and contact information of the administrator or other school official(s) leading and coordinating the policy and information on how the public can get involved with the local wellness policy. This information will be published on the website and in school communications.

### **Triennial Progress Assessments**

At least once every three years, the public charter school will evaluate the implementation of this policy and its progress with a triennial assessment and produce a progress report that will include:

1. The extent to which school(s) under the jurisdiction of the public charter school are in compliance with the policy;
2. The extent to which the public charter school’s policy compares to model local school wellness policy<sup>{1}</sup>; and
3. A description of the progress made in attaining the goals of the public charter school’s policy.

The public charter school will publish the triennial progress report on the school website when available. The public charter school will update or modify the policy based on results of the triennial assessment.

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<sup>1</sup> {Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}



## Community Involvement, Outreach and Communications {<sup>2</sup>}

The public charter school will actively communicate ways in which the community can participate in the development, implementation and periodic review and update of the local wellness policy. The school will communicate information about opportunities. The school will ensure that communications are culturally and linguistically appropriate to the community.

Parents, students, representatives of the school food authority, teachers of physical education, school health professionals, the Board, school administrators, and the general public will be solicited to participate in the periodic review and update of the local school wellness policy.

### NUTRITION PROMOTION AND NUTRITION EDUCATION

Nutrition promotion and nutrition education positively influence lifelong eating behaviors by using evidence-based strategies and techniques and nutrition messages and by creating food environments that support healthy nutrition choices.

To promote nutrition education in the schools, the principal is responsible for ensuring the following goals are implemented:

1. Students and staff will receive consistent nutrition messages throughout the school environment;
2. Nutrition education is provided throughout the student's school years as part of the school's age-appropriate, comprehensive nutrition program (which includes the benefits of healthy eating, essential nutrients, nutritional deficiencies, safe food preparation, and handling and storage related to food and eating), and is aligned and coordinated with the Oregon Health Education Standards and school health education programs;
3. Nutrition education will include culturally relevant, participatory activities that include social learning strategies and activities that are aligned and coordinated with the Oregon Health Education Standards and school health education programs;
4. Parents and families are encouraged through school communications to send healthy snacks/meals and reusable water bottles with their student to school;
5. Families and community organizations are involved, to the extent practicable, in nutrition education;

Nutrition promotion, including marketing and advertising nutritious foods and beverages to students, will be implemented consistently through a comprehensive and multi-channel approach, (e.g., in the classroom, cafeteria and at home) by staff, teachers, parents, students and the community.

To ensure adequate nutrition promotion, the following goals will be implemented:

1. {Information about available meal programs is distributed prior to or at the beginning of the school year and at other times throughout the school year;

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<sup>2</sup> {USDA Local school wellness policy [resource](#); CDC [resource](#); CDC Healthy Schools [resource](#); USDA Local school wellness policy [outreach toolkit](#) and communication resource from [Alliance for a Healthier Generation](#).}

2. Information about availability and location of a Summer Food Service Program (SFSP) is distributed;
3. Physical activity is a planned part of school-community events.

### **School Meals**

The public charter school participates in U.S. Department of Agriculture (USDA) child nutrition program(s), administered through the Oregon Department of Education (ODE), including the National School Lunch Program (NSLP). The school also operates additional nutrition-related programs and activities including school gardens.

The school's available meal program(s) will operate to meet meal pattern requirements and dietary specifications in accordance with the Healthy, Hunger-Free Kids Act and applicable federal laws and regulations.

The administrator or designee will support nutrition and food services operation as addressed in Board policy EFAA – School Nutrition and Food Services and its accompanying administrative regulation EFAA-AR – Reimbursable Meals and Milk Programs.

### **Water**

Free, safe, unflavored, drinking water will be available to all students throughout the school day and throughout every school campus. The public charter school will make drinking water available where school meals are served during mealtimes.

### **Competitive Foods and Beverages**

All foods and beverages outside the reimbursable school meal programs that are sold to students on the school campus during the school day will meet or exceed Smart Snacks Standards<sup>3</sup>. These standards will apply in all locations and through all services where foods and beverages are sold, which may include, but are not limited to, à la carte options in cafeterias, vending machines, school stores, snack or food carts and fund raising.

### **Celebrations and Rewards/Incentives**

All foods and beverages offered on the school campus are encouraged to meet the nutrition standards set by the USDA and the Oregon Smart Snacks Standards. This includes, but is not limited to, celebrations, parties, and classroom snacks brought by parents. Food will not be used as a reward or incentive.

### **Fund Raising**

Foods and beverages that meet or exceed the nutrition standards set by the USDA and the Oregon Smart Snacks Standards may be sold through fund raisers on the school campus during the school day. Such requests to conduct a fund raiser will be submitted to the administrator for approval before starting.

### **Food and Beverage Marketing in Schools**

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<sup>3</sup> Oregon Department of Education, [Oregon Smart Snacks Standards](#)

Any foods and beverages marketed or promoted to students on the school campus during the school day will meet or exceed the nutrition standards for competitive foods set by the USDA.

## **PHYSICAL ACTIVITY AND PHYSICAL EDUCATION**

A quality physical education program is an essential component for all students to learn about and participate in physical activity. The public charter school will develop and assess student performance standards and program minute requirements in order to meet ODE's physical education content standards and state law.

Physical activity should be included in the school's daily education program for grades K through 12 and include regular, instructional physical education, as well as co-curricular activities and recess.

In order to ensure students are afforded the opportunity to engage in physical education and physical activity in the school setting, the following goals are established:

1. Physical education will focus on students' physical literacy and development of motor skills;
2. Physical education courses will be the environment where students learn, and practice developmentally appropriate knowledge, skills and confidence to become physically literate;
3. Instruction, provided by adequately prepared teachers and will meet the state adopted academic content standards for physical education (Oregon Revised Statute (ORS) 329.045).
4. Every public school student in kindergarten through grade 8 shall participate in physical education for the entire school year. Students in kindergarten through grade [5] [6] shall participate for a least 150 minutes during each school week, and students in grades [6] [7] through 8 for at least 225 minutes per school week;
5. Physical activity will be integrated across curricula and throughout the school day. Movement will be made a part of all classes or courses as part of a well-rounded education;
6. Physical activity during the school day (including, but not limited to, recess, classroom physical activity breaks or physical education) will not be used as a punishment or a reward;

A student with a disability shall have suitably adapted physical education incorporated as part of their individualized education program (IEP) developed under ORS 343.151. A student who does not have an IEP but has chronic health problems, other disabling conditions or other special needs that preclude them from participating in regular physical education instruction, shall have suitably adapted physical education incorporated as part of their individualized health plan, developed by the public charter school.

### **Other Activities that Promote Student Wellness**

The school will integrate wellness activities throughout the entire school environment. The school will coordinate and integrate other initiatives related to physical activity, physical education, nutrition and other wellness components so all efforts are complementary, not duplicated and work toward the same set of goals promoting student well-being, optimal development and strong educational outcomes.

END OF POLICY

CR8/08/22 | LF

Local Wellness – EFA  
5-6

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**Legal Reference(s):**

[ORS 327.531](#)  
[ORS 327.537](#)  
[ORS 329.496](#)  
[ORS 336.423](#)

[ORS 338.115](#)  
[OAR 581-051-0100](#)  
[OAR 581-051-0305](#)

[OAR 581-051-0306](#)  
[OAR 581-051-0310](#)  
[OAR 581-051-0400](#)

National School Lunch Program, 7 C.F.R. Part 210 (2022).  
School Breakfast Program, 7 C.F.R. Part 220 (2022).  
Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. § 1758b (2018).

# OSBA Model Charter School Sample Policy

Code: EFA-AR  
Revised/Reviewed:

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## Local Wellness Program

The public charter school comprehensive age-appropriate nutrition program will be implemented in the public charter school in accordance with the following requirements:

### Definitions

1. “Accompaniment foods” means food items served along with another food to enhance palatability such as butter, jelly, cream cheese, salad dressing, croutons and condiments.
2. “Combination foods” means products that contain two or more components representing two or more of the recommended food groups: fruit; vegetable; dairy; protein; or grains.
3. “Competitive foods” means any food or drink sold in competition with the National School Lunch Program (NSLP) and/or School Breakfast Program (SBP) in food service areas during the meal periods.
4. “Entree item” means an item that is either:
  - a. A combination food of meat or meat alternate and whole grain rich food; or
  - b. A combination food of vegetable or fruit and meat or meat alternate; or
  - c. A meat or meat alternate alone with the exception of yogurt, low-fat or reduced fat cheese, nuts, seeds and nut or seed butters and meat snacks (such as dried beef jerky); or
  - d. Grains only when served in the SBP.
5. “Food service area” means any area on school premises where NSLP or SBP meals are both served and eaten, as well as any areas in which NSLP or SBP meals are either served or eaten.
6. “Meal period” means the period(s) during which breakfast or lunch meals are served and eaten, as identified on the school schedule.
7. “Nutrition education” means a planned sequential instructional program that provides knowledge and teaches skills to help students adopt and maintain lifelong healthy eating habits.
8. “Oregon Smart Snacks Standards”<sup>1</sup> means the minimum nutrition standards for competitive foods and beverages.
  - a. Food items, including accompaniment foods, must:
    - (1) Be a grain product that contains 50 percent or more whole grains by weight or have as the first ingredient a whole grain (e.g., flour, flake or meal); or

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<sup>1</sup> Oregon Department of Education, Oregon Smart Snacks Standards

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- (2) Have as the first ingredient, one of the non-grain major food groups: fruits; vegetables; dairy or protein foods (e.g., meat, beans, poultry, seafood, eggs, nuts, seeds); or
- (3) Be a combination food that contains one-quarter cup of fruit and/or vegetable; or
- (4) Have one of the food items above as a second ingredient if water is the first ingredient; and
- (5) Meet all the competitive food nutrient standards:

(a) Calories:

(i) Snacks contain no more than:

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- 1) 150 calories as packaged or served for elementary level;
- 2) 180 calories as packaged or served for middle school level; and
- 3) 200 calories as packaged or served for high school level.

(ii) Entrees contain no more than 350 calories as packaged or served.

(b) Total fat: contains 35 percent or less of total calories from fat per item as packaged or served.

(i) Exemptions to the total fat standard are granted for reduced fat cheese and part-skim mozzarella cheese, nuts, seeds, nut or seed butters, products consisting of only dried fruit with nuts and/or seeds with no added nutritive sweeteners or fat and seafood with no added fat.

(c) Saturated fat: contains no more than 10 percent of total calories from saturated fat per item as packaged or served.

(i) Exemptions to the saturated fat standard are granted for reduced fat cheese and part-skim mozzarella cheese, nuts and products consisting of only dried fruit with nuts and/or seeds with no added nutritive sweeteners or fat.

(d) Trans fat: contains 0 grams of trans fat per item as packaged or served.

(e) Sugar must be no more than 35 percent by weight.

(i) Exempt from the sugar standard are:

- 1) Dried whole fruits or vegetables;
- 2) Dried whole fruit or vegetable pieces;
- 3) Dehydrated fruits or vegetables with no added nutritive sweeteners; and
- 4) Dried fruits with nutritive sweeteners that are required for processing and/or palatability purposes (i.e., cranberries, blueberries, tart cherries).

(f) Sodium:

- (i) Snacks contain no more than 200 mg sodium per item as packaged or served.
- (ii) Entrees contain no more than 480 mg sodium per item as packaged or served.

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- (g) Caffeine free, except for naturally occurring trace amounts, for elementary and middle school level.
- (h) Exempt from all nutrients standards on any day are:
  - (i) Fresh, canned and frozen fruits or vegetables with no added ingredients except water.
  - (ii) Fruit packed in 100 percent juice, extra light or light syrup.
  - (iii) Canned vegetables that contain a small amount of sugar for processing purposes.
  - (iv) [Sugar-free chewing gum.]
- (i) Entrees in same or smaller portion served on the day or the day following in the National School Lunch or School Breakfast Programs are exempt from the nutrient standards for:
  - (i) Calories;
  - (ii) Total fat;
  - (iii) Saturated fat;
  - (iv) Trans fat;
  - (v) Sodium; and
  - (vi) Sugar.

b. Beverages must be:

(1) For elementary level students:

- (a) Plain water, carbonated or uncarbonated, with portion size unlimited;
- (b) Lowfat milk (unflavored), with portion size not to exceed 8 ounces and 150 calories;
- (c) Nonfat milk (including flavored), with portion size not to exceed 8 ounces and 150 calories;
- (d) Nutritionally equivalent milk alternatives, portion size not to exceed 8 ounces and 150 calories;
- (e) Full strength, unsweetened fruit or vegetable juices, portion size not to exceed 8 ounces and 120 calories;
- (f) Fruit and vegetable juice that is 100 percent juice diluted with water, carbonated or uncarbonated, and no added sugar or sweeteners with portion size not to exceed 8 ounces and 120 calories;
- (g) Caffeine free, except for naturally occurring trace amounts.

(2) For middle school level students:

- (a) Plain water, carbonated or uncarbonated, with portion size unlimited;
- (b) Lowfat milk (unflavored), portion size not to exceed 10 ounces and 190 calories;
- (c) Nonfat milk (including flavored), portion size not to exceed 10 ounces and 190 calories;
- (d) Nutritionally equivalent milk alternatives, portion size not to exceed 10 ounces and 190 calories;
- (e) Full strength, unsweetened fruit or vegetable juices, portion size not to exceed 10 ounces and 150 calories;

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- (f) Fruit and vegetable juice that is 100 percent juice diluted with water, carbonated or uncarbonated, and no added sugar or sweeteners with portion size not to exceed 10 ounces and 150 calories;
- (g) Caffeine free, except for naturally occurring trace amounts.

(3) For high school level students:

- (a) Plain water, carbonated or uncarbonated, with portion size unlimited;
- (b) Lowfat milk (unflavored), portion size not to exceed 12 ounces and 225 calories;
- (c) Nonfat milk (including flavored), portion size not to exceed 12 ounces and 225 calories;
- (d) Nutritionally equivalent milk alternatives, portion size not to exceed 12 ounces and 225 calories;
- (e) Full strength, unsweetened fruit or vegetable juices, portion size not to exceed 12 ounces and 180 calories;
- (f) Fruit and vegetable juice that is 100 percent juice diluted with water, carbonated or uncarbonated, and no added sugar or sweeteners with portion size not to exceed 12 ounces and 180 calories;
- (g) Low or no calorie beverage is less than 5 calories per 8 ounce serving or less than or equal to 10 calories per 20 fluid ounces, portion size not to exceed 20 ounce serving;
- (h) Other beverages are not to exceed 40 calories per 8 fluid ounces (or 60 calories per 12 fluid ounces) with portion size not to exceed 12 ounces.

c. Use the nutrient standard for the lowest grade group when mixed grades have open access to competitive foods.

- 9. “School day” means a student education day beginning at midnight and ending at the conclusion of afternoon student activities, such as athletic, music or drama practices, clubs, academic support and enrichment activities.
- 10. “School campus” means all areas of property under the jurisdiction of the school that are accessible to students during the school day.
- 11. “Snack” means a food that is generally regarded as supplementing a meal and includes, but is not limited to, chips, crackers, onion rings, nachos, french fries, doughnuts, cookies, pastries, cinnamon rolls and candy.

### **Nutrition Promotion and Nutrition Education**

Nutrition promotion and nutrition education shall be a sequential and integrated focus on improving students’ eating behaviors, reflect evidence based strategies and be consistent with state and local health education standards. Nutrition education at all levels of the public charter school’s curriculum shall include the following essential components designed to help students learn:

- 1. Age-appropriate nutritional knowledge, including the benefits of healthy eating, essential nutrients, nutritional deficiencies, principles of healthy weight management, the use and misuse of dietary supplements, safe food preparation, handling and storage and cultural diversity related to food and eating;



2. Age-appropriate nutrition-related skills, including but not limited to, planning a healthy meal, understanding and using food labels and critically evaluating nutrition information, misinformation and commercial food advertising; and
3. How to assess one's personal eating habits, set goals for improvement and achieve those goals.

### **Food and Beverage Marketing**

The public charter school (i.e., school nutrition services, PTA, PTO) will review existing contracts, new contracts and equipment and product purchase or replacement to reflect the applicable food and beverage marketing guidelines established by the public charter school wellness policy.

“Food and beverage marketing” is defined as advertising and other promotions in schools. Food and beverage marketing often includes oral, written or graphic statements made for the purpose of promoting the sale of a food or beverage product made by the producer, manufacturer, seller or any other entity with a commercial interest in the product.

This term includes, but is not limited to, the following:

1. Brand names, trademarks, logos or tags, except when placed on a physically present food or beverage product or its container;
2. Displays, such as on vending machine exteriors;
3. Corporate brand, logo, name or trademark on school equipment, such as marquees, message boards, scoreboards or backboards.

Note: Immediate replacement of these items is not required; however, public charter schools will replace other durable equipment when existing contracts are up for renewal or to the extent that is financially possible over time so that items are in compliance.

4. Corporate brand, logo, name or trademark on cups used for beverage dispensing, menu boards, coolers, trash cans and other food service equipment; as well as on posters, book covers, student assignment books or school supplies displayed, distributed, offered or sold by the public charter school;
5. Advertisements in school publications or school mailings;
6. Free product samples, taste tests or coupons of a product, or free samples displaying advertising of a product.

### **Physical Activity and Physical Education**

In order to insure students are afforded the opportunity to engage in physical activity and physical education in the school setting, the following guidelines apply:

1. Physical activity will be integrated across curricula and throughout the school day. Movement will be made a part of all classes or courses as part of a well-rounded education;

2. Physical education will be a course of study that focuses on students' physical literacy and development of motor skills;
3. Physical education courses will be the environment where students learn, practice and are assessed on developmentally appropriate knowledge, skills and confidence to become physically literate;
4. All physical education classes will be taught by licensed physical education teachers and/or appropriately licensed teachers as outlined by the Teacher Standards and Practices Commission (TSPC);
5. Daily recess period(s) will be provided that will not be used as a punishment or a reward.

### **Nutrition Guidelines and Food Services Operation**

In order to support the school's nutrition and food services operation as an essential partner in the educational mission of the public charter school and its role in the public charter school's comprehensive nutrition program, the administrator is responsible for ensuring:

1. The school encourages all students to participate in the school's NSLP [and SBP] meal opportunities;
2. The school notifies families of need-based programs for free or reduced-price meals and encourages eligible families to apply;
3. The school's NSLP[,] [and] [SBP] [Special Milk Program (SMP)] maintains the confidentiality of students and families applying for or receiving free or reduced-priced meals [or free milk] in accordance with the National School Lunch Act;
4. The school's NSLP[,] [and] [SBP] [SMP] operates to meet dietary specifications in accordance with the Healthy, Hunger-Free Kids Act of 2010 and applicable state laws and regulations;
5. The school sells or serves varied and nutritious food choices consistent with the applicable nutrition standards set by the USDA and the Oregon Smart Snacks Standards. A public charter school, that operates or contracts the food service component of their NSLP and SBP, shall form a nutrition advisory committee comprised of staff, students and parents. Cultural norms and preferences will be considered;
6. Food prices set by the public charter school are communicated to students and parents. Public charter school pricing strategies will encourage students to purchase full meals and nutritious items;
7. Procedures are in place to provide families, on request, information about the ingredients and nutritional value of the foods served;

8. Modified meals are prepared for students with special dietary needs:
  - a. The public charter school will provide substitute foods to students with a disability<sup>2</sup> that restricts their diet, when supported by a written statement from a state-licensed health care professional who is authorized to write medical prescriptions.
  - b. Such substitutions will be provided only when a medical statement from the licensed health care professional is on file at the school. The medical statement must state the nature of the child's impairment so its effect on the student's diet is understood, and what must be done to accommodate the impairment.
9. Food service equipment and facilities meet applicable local and state standards concerning health, safe food preparation, handling and storage, drinking water, sanitation and workplace safety;
10. Students are provided adequate time and space to eat meals in a pleasant and safe environment. School dining areas will be reviewed to ensure:
  - a. Tables and chairs are of the appropriate size for students;
  - b. Seating is not overcrowded;
  - c. Students have a relaxed environment;
  - d. Noise is not allowed to become excessive;
  - e. Rules for safe behavior are consistently enforced;
  - f. Tables and floors are cleaned between meal periods;
  - g. The physical structure of the eating area is in good repair; and
  - h. Appropriate supervision is provided.
11. The guidelines for reimbursable school meals shall not be less restrictive than regulations and guidance issued by the Secretary of Agriculture pursuant to subsections (a) and (b) of section 10 of the Child Nutrition Act (42 U.S.C. § 1779) and sections 9(f)(1) and 17(a) of the Richard B. Russell National School Lunch Act (42 U.S.C. § 1758(f)(1), § 1766(a)), as those regulations and guidance apply to schools.

### **Competitive Food Sales**

In keeping with federal regulations, the public charter school controls the sale of all competitive foods. Accordingly, the public charter school will select food items that meet the Oregon Smart Snacks Standards.

The sale of foods and beverages in competition with the public charter school's NSLP and SBP meals shall be permitted when all income from the food sales accrues to the benefit of the public charter school's nutrition and food services operation or a school or student organization as approved by the Board.

### **Other Foods Offered or Sold**

Foods and beverages sold [or offered] in classrooms or school-sponsored activities during the school day shall follow the Oregon Smart Snacks Standards.

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<sup>2</sup> To comply with Section 504 as it relates to a student's severe food allergy, such as milk, gluten, nut or soy, and including but not limited to diabetes, colitis, etc.

Foods and beverages that meet or exceed the nutrition standards set by the USDA and the Oregon Smart Snacks Standards may be sold through fund raisers on the school campus during the school day.

### [Employee Wellness<sup>3</sup>

The public charter school’s Employee Wellness Program [may][shall] include the following:

1. Health education and health promoting activities that focus on skill development and lifestyle behavior that change along with awareness building, information dissemination, access to facilities, and are preferably tailored to employee’s needs and interests;
2. Safe, supportive social and physical environments including organizational expectations about healthy behavior, and implementation of policy that promotes health and safety and reduces the risk of disease;
3. Linkage to related programs such as employee assistance programs, emergency care and programs that help employees balance work life and family life;
4. Education and resources to help employees make decisions about health care; and
5. Nutrition and fitness educational opportunities that may include, but are not limited to, the distribution of educational and informational materials, and the arrangement of presentations and workshops that focus on healthy lifestyles, health assessments, fitness activities and other appropriate nutrition and physical activity related topics.

The public charter school encourages participation from all employees. “Employees” are not limited to instructional staff (i.e. teachers and instructional assistants), but includes all administrators and support staff. The following groups are seen as essential for establishing, implementing and sustaining an effective employee wellness program:

1. School personnel who implement existing wellness programs in the public charter school (i.e., employee wellness committee);
2. School personnel who implement health programs for students (e.g., school health coordinator, school nurses, psychologist, health and physical educators, nutrition professionals, counselors and other school staff); and
3. Decision makers who have the authority to approve policy and provide administrative support essential for a school wellness program(e.g., Board members, administrators, human resource administrators and fiscal services administrators).]

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<sup>3</sup> [This language is optional and is not required by state or federal law.]

## Other Activities that Promote Student Wellness

The public charter school will provide the following activities and encourage the following practices which promote local wellness:

1. [Scoliosis screenings;]
2. [Safe Routes to Schools Program;]
3. [Physically active community engagement (e.g., skate night, fun run, dance night);]
4. [Nonfood-related fund raisers;]
5. [Physical activity brain breaks during transitions from one subject to another;]
6. [Intramural sports;]
7. [Monthly/Weekly school walks;]
8. [Assemblies which focus on wellness issues such as the importance of breakfast, healthy beverages, and how students and staff can incorporate 60 minutes of physical activity into their day;]
9. [The use of alternates to food as rewards in the classroom;]
10. [Support groups for overweight and underweight students, and those students who struggle with nutrition and physical activity;]
11. [Communication between classroom teachers and nutrition staff, so that menus and nutrition promotion can be tied into classroom learning and coursework;]
12. [Include wellness as a standing agenda item for school-based meetings (e.g., staff meetings, site council meetings, PTO).]

## Staff Development

Ongoing pre-service and professional development training opportunities for staff will be encouraged. Staff responsible for nutrition education will be encouraged to participate in professional development activities to effectively deliver the nutrition education program as planned. Nutrition and food services personnel will receive opportunities to participate in professional development activities that address strategies for promoting healthy eating behavior; food safety; maintaining safe, orderly and pleasant eating environments; and other topics directly relevant to the employee's job duties. The administrator is responsible to ensure such training is made available, including but not limited to, the following:

1. Personnel management;
2. Financial management and record keeping;
3. Cost- and labor-efficient food purchasing and preparation;
4. Sanitation and safe food handling, preparation and storage;

5. Planning menus for students with special needs and students of diverse cultural backgrounds;
6. Customer service and student and family involvement;
7. Marketing healthy meals;
8. Principles of nutrition education, including selected curriculum content and innovative nutrition teaching strategies; and
9. Assessment by staff of their own eating practices and increased awareness of behavioral messages staff provide as role models.

### **Family and Community Involvement**

In order to promote family and community involvement in supporting and reinforcing nutrition education in the schools, the administrator is responsible for ensuring:

1. Nutrition education materials and cafeteria menus are sent home with students;
2. Parents are encouraged to send healthy snacks or meals to school;
3. Parents and other family members are invited to periodically eat with their student in the cafeteria;
4. Families are invited to attend exhibitions of student nutrition projects or health fairs;
5. Nutrition education workshops and screening services are offered;
6. Nutrition education homework that students can do with their families is assigned (e.g., reading and interpreting food labels, reading nutrition-related newsletters, preparing healthy recipes, etc.);
7. Staff is encouraged to cooperate within their own schools and with other agencies and community groups to provide opportunities for student volunteer or paid work related to nutrition, as appropriate;
8. Staff encourages and provides support for parental involvement in their children's physical education[;][.]
9. [Materials promoting physical activity are sent home with students; and]
10. [Physical activity is a planned part of all public charter school-community events.]

### **Program Evaluation**

In order to evaluate the effectiveness of the local wellness program in promoting healthy eating, increased physical activity among students, and to implement program changes as necessary to increase its effectiveness, the administrator is responsible for ensuring:

1. Board policy and this administrative regulation are implemented as written;

2. All building, grade-level nutrition education curricula and materials are assessed for accuracy, completeness, balance and consistency with state and local public charter school educational goals and standards;
3. Nutrition education is provided throughout the student's school years as part of the public charter school's age-appropriate, comprehensive nutrition program, and is aligned and coordinated with the Oregon Health Education Standards and school health education programs;
4. Teachers deliver nutrition education through age-appropriate, culturally relevant, participatory activities that include social learning strategies and activities that are aligned and coordinated with the Oregon Health Education Standards and school health education programs;
5. Teachers and school nutrition and food service personnel have undertaken joint project planning and action;
6. Teachers have received curriculum-specific training;
7. [Teachers provide physical activity instruction and programs that meet the needs and interests of all students;]
8. Families and community organizations are involved, to the extent practicable, in nutrition education; and
9. [One or more persons] within the school, as appropriate, will be charged with the operational responsibility of ensuring that the policy and administrative regulations are followed and will develop an evaluation plan to be used to assess the public charter school's level of compliance with state and federal requirements.

## OSBA Model Charter School Sample Policy

Code: GBEA  
Adopted:

### Workplace Harassment \*

Workplace harassment is prohibited and shall not be tolerated. This includes workplace harassment that occurs between public charter school employees or between a public charter school employee and the public charter school in the workplace or at a work-related event that is off public charter school premises and coordinated by or through the public charter school, or between a public charter school and a public charter school employee off public charter school premises. Board members, volunteers and interns are subject to this policy.

Any public charter school employee who believes they have been a victim of workplace harassment may file a report with the public charter school employee designated in the administrative regulation GBEA-AR - Workplace Harassment Reporting and Procedure, may file a report through the Bureau of Labor and Industries' (BOLI) complaint resolution process or under any other available law. The reporting of such information is voluntary. The public charter school employee making the report is advised to document any incidents of workplace harassment.

“Workplace harassment” means conduct that constitutes discrimination prohibited by Oregon Revised Statute (ORS) 659A.030 (discrimination in employment based on race, color, religion, sex, sexual orientation, gender identity, national origin, marital status, age, or expunged juvenile record), including conduct that constitutes sexual assault<sup>1</sup> or that constitutes conduct prohibited by ORS 659A.082 (discrimination against person in uniformed service) or 659A.112 (discrimination in employment based on disability).

The public charter school, upon receipt of a report from a public charter school employee who believes they are a victim of workplace harassment, shall provide information about legal resources and counseling and support services, including any available employee assistance services. The public charter school employee receiving the report, whether a supervisor of the employer or the public charter school employee designated to receive reports, is advised to document any incidents of workplace harassment, and shall provide a copy of this policy and accompanying administrative regulation to the victim upon their disclosure about alleged workplace harassment.

All incidents of behavior that may violate this policy shall be promptly investigated.

Any person who reports workplace harassment has the right to be protected from retaliation.

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<sup>1</sup> “Sexual assault” means unwanted conduct of a sexual nature that is inflicted upon a person or compelled through the use of physical force, manipulation, threat or intimidation.



The public charter school may not require or coerce a public charter school employee to enter into a nondisclosure<sup>2</sup> or nondisparagement<sup>3</sup> agreement.

The public charter school may not enter into an agreement with an employee or prospective employee, as a condition of employment, continued employment, promotion, compensation, or the receipt of benefits, that contains a nondisclosure provision, a nondisparagement provision or any other provision that has the purpose or effect of preventing the employee from disclosing or discussing workplace harassment that occurred between public charter school employees or between a public charter school employee and the public charter school, in the workplace or at a work-related event that is off public charter school premises and coordinated by or through the public charter school, or between a public charter school employee and employer off public charter school premises.

The public charter school may enter into a settlement agreement, separation or severance agreement that includes one or more of the following provisions only when a public charter school employee claiming to be aggrieved by workplace harassment requests to enter into the agreement: 1) a nondisclosure or nondisparagement provision; 2) a provision that prevents disclosure of factual information relating to the claim of workplace harassment; or 3) a no-rehire provision that prohibits the employee from seeking reemployment with the public charter school as a term or condition of the agreement. The agreement must provide the public charter school employee at least seven days after signing the agreement to revoke it.

If the public charter school determines in good faith that an employee has engaged in workplace harassment, the public charter school may enter into a settlement, separation or severance agreement that includes one or more of the provisions described in the previous paragraph.

It is the intent of the Board that appropriate corrective action will be taken by the public charter school to stop workplace harassment, prevent its recurrence and address negative consequences. Staff members in violation of this policy shall be subject to discipline, up to and including dismissal and/or additional workplace harassment awareness training, as appropriate. Other individuals (e.g., board members and volunteers and interns) whose behavior is found to be in violation of this policy shall be subject to appropriate sanctions as determined and imposed by the administrator or the Board.

The public charter school shall make this policy available to all public charter school employees and shall be made a part of public charter school orientation materials provided and copied to new public charter school employees at the time of hire.

The administrator will establish a process of reporting incidents of workplace harassment and the prompt investigation.

END OF POLICY

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<sup>2</sup> A “nondisclosure” agreement or provision prevents either party from disclosing the contents of or circumstances surrounding the agreement.

<sup>3</sup> A “nondisparagement” agreement or provision prevents either party from making disparaging statements about the other party.

**Legal Reference(s):**

[ORS 174.100](#)  
[ORS 243.317 - 243.323](#)  
[ORS 338.115](#)  
[ORS 659A.001](#)  
[ORS 659A.003](#)  
[ORS 659A.006](#)

[ORS 659A.029](#)  
[ORS 659A.030](#)  
[ORS 659A.082](#)  
[ORS 659A.112](#)  
[ORS 659A.370](#)  
[ORS 659A.820](#)

[ORS 659A.875](#)  
[ORS 659A.885](#)  
[OAR 584-020-0040](#)  
[OAR 584-020-0041](#)

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018).  
Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018).  
Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2020).  
Bartsch v. Elkton School District, FDA-13-011 (March 27, 2014).

**Deleted:** House Bill 3041 (2021)\*

## OSBA Model Charter School Sample Policy

Code: IGAI  
Adopted:

### **Human Sexuality, AIDS/HIV, Sexually Transmitted Diseases, Health Education\*\***

The public charter school shall provide an age appropriate, comprehensive plan of instruction focusing on human sexuality, HIV/AIDS and sexually transmitted infections and disease prevention in elementary and secondary schools as an integral part of health education and other subjects. Course material and instruction for all human sexuality education courses that discuss human sexuality shall enhance a student's understanding of sexuality as a normal and healthy aspect of human development. A part of the comprehensive plan of instruction shall provide age-appropriate child sexual abuse prevention instruction for students in kindergarten through grade 12. The public charter school must provide a minimum of four instructional sessions annually; one instructional session is equal to one standard class period. In addition, the HIV/AIDS and sexually transmitted infections and disease prevention education and the human sexuality education comprehensive plan shall provide adequate instruction at least annually, for all students in grades 6 through 8.

Parents, teachers, school administrators, local health departments staff, other community representatives and persons from the medical community who are knowledgeable of the latest scientific information and effective education strategies shall develop the plan of instruction and align it with the Oregon Health Education Standards and Benchmarks.

The Board shall approve the plan of instruction and require that it be reviewed and updated biennially in accordance with new scientific information and effective educational strategies.

Parents of minor students shall be notified in advance of any human sexuality or AIDS/HIV instruction. Any parent may request that their child be excused from that portion of the instructional program under the procedures set forth in Oregon Revised Statute (ORS) 336.035(2).

The comprehensive plan of instruction shall include the following information that:

1. Promotes abstinence for school age youth and mutually monogamous relationships with an uninfected partner for adults;
2. Allays those fears concerning HIV that are scientifically groundless;
3. Is balanced and medically accurate;
4. Provides balanced, accurate information and skills-based instruction on risks and benefits of contraceptives, condoms and other disease reduction measures;
5. Discusses responsible sexual behaviors and hygienic practices which may reduce or eliminate unintended pregnancy, exposure to HIV, hepatitis B/C and other sexually transmitted infections and diseases;
6. Stresses the risks of behaviors such as the sharing of needles or syringes for injecting illegal drugs and controlled substances;

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Human Sexuality, AIDS/HIV, Sexually Transmitted  
Diseases, Health Education\*\* – IGAI

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7. Discusses the characteristics of the emotional, physical and psychological aspects of a healthy relationship;
8. Discusses the benefits of delaying pregnancy beyond the adolescent years as a means to better ensure a healthy future for parents and their children. The student shall be provided with statistics based on the latest medical information regarding both the health benefits and the possible side effects of all forms of contraceptives including the success and failure rates for prevention of pregnancy, sexually transmitted infections and diseases;
9. Stresses that HIV/STDs and hepatitis B/C can be possible hazards of sexual contact;
10. Provides students with information about Oregon laws that address young people's rights and responsibilities relating to childbearing and parenting;
11. Advises students of consequences of having sexual relations with persons younger than 18 years of age to whom they are not married;
12. Encourages family communication and involvement and helps students learn to make responsible, respectful and healthy decisions;
13. Teaches that no form of sexual expression or behavior is acceptable when it physically or emotionally harms oneself or others and that it is wrong to take advantage of or exploit another person;
14. Teaches that consent is an essential component of healthy sexual behavior. Course material shall promote positive attitudes and behaviors related to healthy relationships and sexuality, and encourage active student bystander behavior;
15. Teaches students how to identify and respond to attitudes and behaviors which contribute to sexual violence;
16. Validates the importance of one's honesty, respect for each person's dignity and well-being, and responsibility for one's actions;
17. Uses inclusive materials and strategies that recognizes different sexual orientations, gender identities and gender expression;
18. Includes information about relevant community resources, how to access these resources, and the laws that protect the rights of minors to anonymously access these resources; and
19. Is culturally inclusive.

The comprehensive plan of instruction shall emphasize skills-based instruction that:

1. Assists students to develop and practice effective communication skills, development of self-esteem and ability to resist peer pressure;
2. Provides students with the opportunity to learn about and personalize peer, media, technology and community influences that both positively and negatively impact their attitudes and decisions related

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to healthy sexuality, relationships and sexual behaviors, including decisions to abstain from sexual intercourse;

3. Enhances students' ability to access valid health information and resources related to their sexual health;
4. Teaches how to develop and communicate sexual and reproductive boundaries;
5. Is research based, evidence based or best practice; and
6. Aligns with the Oregon Health Education Content Standards and Benchmarks.

All sexuality education programs emphasize that abstinence from sexual intercourse, when practiced consistently and correctly, is the only 100 percent effective method against unintended pregnancy, sexually transmitted HIV and hepatitis B/C infection and other sexually transmitted infections and diseases.

Abstinence is to be stressed, but not to the exclusion of contraceptives and condoms for preventing unintended pregnancy, HIV infection, hepatitis B/C infection and other sexually transmitted infections and diseases. Such courses are to acknowledge the value of abstinence while not devaluing or ignoring those students who have had or are having sexual relationships. Further, sexuality education materials, including instructional strategies, and activities must not, in any way use shame or fear-based tactics.

Materials and information shall be presented in a manner sensitive to the fact that there are students who have experienced, perpetrated or witnessed sexual abuse and relationship violence.

The school's health and sexuality education will provide information on menstrual health and will be inclusive and affirming of transgender, non-binary, intersex, and two spirit/indigiqueer students; be positive and not fear- or shame-based; be age-appropriate; be medically-accurate; be culturally responsive; and be accessible for students with disabilities.

END OF POLICY

**Legal Reference(s):**

<a href="#">ORS 336.035</a>	<a href="#">ORS 338.115</a>	<a href="#">OAR 581-021-0593</a>
<a href="#">ORS 336.059</a>	<a href="#">ORS 339.370 - 339.400</a>	<a href="#">OAR 581-022-2050</a>
<a href="#">ORS 336.107</a>		<a href="#">OAR 581-022-2220</a>
<a href="#">ORS 336.455 - 336.474</a>	<a href="#">OAR 581-021-0009</a>	

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# OSBA Model Charter School Sample Policy

Code: JEA  
Adopted:

## Compulsory Attendance\*\*

Except when exempt by Oregon law, all children between ages 6 and 18 who have not completed the 12th grade are required to regularly attend a public, full-time school during the entire school term. Persons having legal control of a child between the ages 6 and 18, who has not completed the 12th grade, are required to have the child attend and maintain the child in regular attendance during the entire school term.

All children five years of age who have been enrolled in a public school are required to attend regularly while enrolled in the public school. Persons having legal control of a child, who is five years of age and has enrolled the child in a public school, are required to have the child attend and maintain the child in regular attendance during the school term.

Attendance supervisors shall monitor and report any violation of the compulsory attendance law to the administrator or designee. The administrator will notify the [superintendent] of the sponsoring district when a student is considered truant.

A parent who is not supervising their child by requiring school attendance may also be in violation of Oregon Revised Statute (ORS) 163.577(1)(c); failing to supervise a child is a Class A violation.

### Exemptions from Compulsory School Attendance

In the following cases, children shall not be required to attend public, full-time schools:

1. Children being taught in a private or parochial school in 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 students attending public schools.
2. Children proving to the Board's satisfaction 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. Children who have received a high school diploma or a modified diploma.
4. Children being taught, by a private teacher, the courses of study usually taught in kindergarten through grade 12 in the public school for a period equivalent to that required of students attending public schools.
5. Students being educated in the home by a parent or guardian or private teacher.
6. Children whose sixth birthday occurred on or before September 1 immediately preceding the beginning of the current school year, if the parent or guardian notified the child's resident district in writing that the parent or guardian is delaying the enrollment of their child for one school year to better meet the child's needs for cognitive, social or physical development, as determined by the parent or guardian.

**Deleted:** Persons having legal control of a child between the ages 6 and 18, who has not completed the 12th grade, are required to have the child attend and maintain the child in regular attendance during the entire school term. Persons having legal control of a child, who is five years of age and has enrolled the child in a public school, are required to have the child attend and maintain the child in regular attendance during the school term.

**Deleted:** Failure to send a child to school and to maintain a child in regular attendance in school is a Class C violation.

**Deleted:** public charter school will develop procedures for issuing a citation

7. Children who are present in the United States on a nonimmigrant visa and who are attending a private, accredited English language learner program in preparation for attending a private high school or college.
8. Children excluded from attendance as provided by law.
9. Children who are eligible military children<sup>1</sup> are exempt up to 10 days after the date of military transfer or pending transfer indicated in the official military order.
10. An exemption may be granted to the parent or guardian of any child 16 or 17 years of age who is lawfully employed full-time, or who is lawfully employed part-time and enrolled in school, a community college or an alternative education program as defined in ORS 336.615.
11. An exemption may be granted to any child who is an emancipated minor or who has initiated the procedure for emancipation under ORS 419B.550 to 419B.558.

END OF POLICY

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**Legal Reference(s):**

[ORS 153.018](#)  
[ORS 163.577](#)  
[ORS 338.115\(2\)](#)  
[ORS 339.010 - 339.095](#)  
[ORS 339.139](#)

[ORS 339.990](#)  
[ORS 807.065](#)  
[ORS 807.066](#)  
  
[OAR 581-021-0026](#)

[OAR 581-021-0029](#)  
[OAR 581-021-0076](#)  
[OAR 581-021-0077](#)

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<sup>1</sup> “Military child” means a child who is in a military family covered by the Interstate Compact on Educational Opportunity for Military Children, as determined under rules adopted by the State Board of Education.

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## OSBA Model Charter School Sample Policy

Code: **JGAB**  
Adopted:

### Use of Restraint or Seclusion\*\*

The Board is dedicated to the development and application of best practices within the public charter schools educational/behavioral programs. The Board establishes this policy and its administrative regulation to define the circumstances that must exist and the requirements that must be met prior to, during, and after the use of restraint or seclusion as an intervention with public charter school students.

The use of the following types of restraint on a student in the public charter school is prohibited:

1. Chemical restraint.
2. Mechanical restraint.
3. Prone restraint.
4. Supine restraint.
5. Any restraint that involves the intentional and nonincidental use of a solid object<sup>1</sup>, including a wall or the floor, to impede a student's movement, unless the restraint is necessary to prevent an imminent life-threatening injury or to gain control of a weapon.
6. Any restraint that places, or creates a risk of placing, pressure on a student's mouth, neck or throat.
7. Any restraint that places, or creates a risk of placing, pressure on a student's mouth, unless the restraint is necessary for the purpose of extracting a body part from a bite.
8. Any restraint that impedes, or creates a risk of impeding, breathing.
9. Any restraint that involves the intentional placement of the hands, feet, elbow, knee or any object on a student's neck, throat, genitals or other intimate parts.
10. Any restraint that causes pressure to be placed, or creates a risk of causing pressure to be placed, on the stomach or back by a knee, foot or elbow bone.
11. Any action designed for the primary purpose of inflicting pain.

**The use of a seclusion cell is prohibited.**

Restraint or seclusion may not be used for discipline, punishment, retaliation or convenience of staff, contractors or volunteers of the public charter school.

<sup>1</sup> The use of a solid object, including furniture, a wall, or the floor, by public charter school staff performing a restraint is not prohibited if the object is used for the staff's own stability or support while performing the restraint and not as a mechanism to apply pressure directly to the student's body.

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Restraint may be imposed on a student in the public charter school only under the following circumstances:

1. The student’s behavior imposes a reasonable risk of imminent and substantial physical or bodily injury to the student or others; and
2. Less restrictive interventions would not be effective.

Seclusion may be used on a student in the public charter school only under the following circumstances:

1. The student’s behavior imposes a reasonable risk of imminent and serious bodily injury to the student or others; and
2. Less restrictive interventions would not be effective.

If restraint or seclusion is used on a student, by trained staff or other staff available in the case of an emergency when trained staff are not immediately available due to the unforeseeable nature of the emergency, e.g., teacher, administrator, or volunteer, it will be used only for as long as the student’s behavior poses a reasonable risk of imminent and substantial physical or bodily injury to the student or others and less restrictive interventions would not be effective. Students will be continuously monitored by staff for the duration of the restraint or seclusion.

**Definitions**

1. “Restraint” means the restriction of a student’s actions or movements by holding the student or using pressure or other means.

“Restraint” does not include:

- a. Holding a student’s hand or arm to escort the student safely and without the use of force from one area to another;
- b. Assisting the student to complete a task if the student does not resist the physical contact; or
- c. Providing reasonable intervention with the minimal exertion of force necessary if the intervention does not include a restraint prohibited under Oregon Revised Statute (ORS) 339.288 and the intervention is necessary to:
  - (1) Break up a physical fight;
  - (2) Interrupt a student’s impulsive behavior that threatens the student’s immediate safety, including running in front of a vehicle or climbing on unsafe structures or objects; or
  - (3) Effectively protect oneself or another from an assault, injury or sexual contact with the minimum physical contact necessary for protection.

2. “Seclusion” means the involuntary confinement of a student alone in a room from which the student is physically prevented from leaving. Seclusion includes, but is not limited to, the involuntary confinement of a student alone in a room with a closed door, whether the door is locked or unlocked.

“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 if the student is in a setting from which the student is not physically prevented from leaving, or a student being left alone in a room with a closed door for a brief period of time if the student is left alone for a purpose that is unrelated to the student’s behavior.

3. “Seclusion cell” means a freestanding, self-contained unit that is used to isolate the student from other students or physically prevent a student from leaving the unit or cause the student to believe that the student is physically prevented from leaving the unit.

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4. “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.
5. “Substantial physical or bodily injury” means any impairment of the physical condition of a person that requires some form of medical treatment.
6. “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.
7. “Chemical restraint” means a drug or medication that is used on a student to control behavior or restrict freedom of movement that is not prescribed by a licensed physician or other qualified health professional acting under the professional’s scope of practice for standard treatment of the student’s medical or psychiatric condition; and administered as prescribed by a licensed physician or other qualified health professional acting under the professional’s scope of practice.
8. “Prone restraint” means a restraint in which a student is held face down on the floor.
9. “Supine restraint” means a restraint in which a student is held face up on the floor.

Any student being restrained or secluded within the scope of the public charter school program 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 meet the standards as outlined in Oregon Administrative Rule (OAR) 581-021-0568.

The public charter school shall utilize the MANDT training program of restraint or seclusion for use by the public charter school staff. As required by state regulation, the selected program shall be one approved by the Oregon Department of Education (ODE) and include, but not limited to, positive behavior support, conflict prevention, de-escalation and crisis response techniques. Any program selected by the public charter school must be in compliance with state and federal law with respect to the use of restraint and seclusion.

An annual review of the use of restraint and seclusion during the preceding school year shall be completed and submitted to ODE to ensure compliance with public charter school policies and procedures.

The results of the review and annual report shall be documented and shall include at a minimum:

1. The total number of incidents involving restraint;
2. The total number of incidents involving seclusion;
3. The total number of seclusions in a locked room;
4. The total number of students placed in restraint;
5. The total number of student placed in seclusion;
6. The total number of incidents that resulted in injuries or death to students or staff as a result of the use of restraint or seclusion;

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7. The total number of students placed in restraint or seclusion more than 10 times in a school year and an explanation of what steps have been taken by the public charter school to decrease the use of restraint and seclusion for each student;
8. The total number of restraint or seclusion incidents carried out by untrained individuals;
9. The demographic characteristics<sup>2</sup> of all students upon whom restraint or seclusion was imposed;
10. The total number of rooms available for use by the public charter school for seclusion of a student and a description of the dimensions and design of the rooms.

This annual report shall be made available to the public at the public charter school’s main office and on the public charter school website, to the Board, and to the school’s sponsor.

At least once each school year the parents and guardians of students of the district shall be notified about how to access the report.

The public charter school shall investigate all complaints regarding the use of restraint or seclusion practices according to the procedures outlined in Board policy KL - Public Complaints and KL-AR - Public Complaint Procedure. The complaint procedure is available at the school’s administrative office and is available on the home page of the school’s website.

The administrator 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 restraint or seclusion by public charter school staff.

END OF POLICY

**Legal Reference(s):**

<a href="#">ORS 161.205</a>	<a href="#">ORS 339.300</a>	<a href="#">OAR 581-021-0563</a>
<a href="#">ORS 339.250</a>	<a href="#">ORS 339.303</a>	<a href="#">OAR 581-021-0566</a>
<a href="#">ORS 339.285</a>		<a href="#">OAR 581-021-0568</a>
<a href="#">ORS 339.288</a>	<a href="#">OAR 581-021-0061</a>	<a href="#">OAR 581-021-0569</a>
<a href="#">ORS 339.291</a>	<a href="#">OAR 581-021-0550</a>	<a href="#">OAR 581-021-0570</a>
<a href="#">ORS 339.294</a>	<a href="#">OAR 581-021-0553</a>	<a href="#">OAR 581-022-2267</a>
<a href="#">ORS 339.297</a>	<a href="#">OAR 581-021-0556</a>	<a href="#">OAR 581-022-2370</a>

<sup>2</sup> Including race, ethnicity, gender, disability status, migrant status, English proficiency and status as economically disadvantaged, unless the demographic information would reveal personally identifiable information about an individual student.

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# OSBA Model Sample Charter School Policy

Code: JHC  
Adopted:

## Student Health Services and Requirements\*\*

[The public charter school shall staff nursing services appropriate for students with medical needs and prevention-oriented health services per applicable requirements of Oregon Revised Statutes (ORS) 336.201 and Oregon Administrative Rule (OAR) 581-022-2220.]

The public charter school shall provide:

1. One registered nurse or school nurse for every 125 medically fragile students;
2. One registered nurse or school nurse or one licensed practical nurse under the supervision of a registered nurse or school nurse for each nursing-dependent student; and
3. One registered nurse or school nurse for every 225 medically complex students.

The public charter school may use the most cost effective means available to meet requirements.

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[Any nurse(s) providing services to the school shall follow all applicable requirements of Oregon Revised Statutes (ORS) Chapter 678 and Oregon Administrative Rule (OAR) Chapter 851. This includes, but is not limited, delegation in accordance with OAR 851-047, which includes performing a nursing assessment of the patient prior to delegation, providing adequate supervision during the delegation, and evaluating the skills, ability and willingness of the delegee.<sup>1</sup>]

The public charter school shall maintain a prevention-oriented health services program which provides:

1. Pertinent health information on the students, as required by Oregon statutes or rules;
2. Health appraisal to include screening for possible vision or hearing problems;
3. Health counseling for students and parents, when appropriate;
4. Health care and first-aid assistance that are appropriately supervised and isolates the sick or injured child from the student body;
5. Control and prevention of communicable diseases as required by Oregon Health Authority, Public Health Division, and the county health department;
6. Assistance for students in taking medication according to established public charter school procedures;
7. Services for students who are medically fragile or have special health care needs;

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<sup>1</sup> For additional delegation requirements, see OAR [851-047-0030](#).

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8. Integration of school health services with school health education programs.

The Board directs its health staff to coordinate with health personnel from other public agencies in matters pertaining to health instruction or the general health of students and employees.

In accordance with the requirements of federal law, the public charter school recognizes its responsibility to notify parents in advance of any nonemergency, invasive physical examination<sup>2</sup> or screening that is required as condition of attendance; administered and scheduled by the school in advance; and not necessary to protect the immediate health and safety of the student, or of other students. Notification will be provided at least annually at the beginning of the school year or when enrolling students for the first time in school and will include the specific or approximate dates during the school year when such activities are scheduled or expected to be scheduled.

Procedures shall be developed and implemented to carry out this policy. All public charter school employees will be apprised of their responsibilities in this area. Parents shall have the opportunity to request their students be exempt from participation in vision or hearing screening. The public charter school will abide by those requests.

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END OF POLICY

Legal Reference(s):

[ORS 336.201](#)  
[ORS 336.211](#)

[ORS 338.115](#)  
[OAR 581-022-2050](#)

[OAR 581-022-2220](#)  
[OAR 581-022-2225](#)

Protection of Pupil Rights, 20 U.S.C. § 1232h (2018); Student Rights in Research, Experimental Programs and Testing, 34 C.F.R. Part 98 (2022).  
Every Student Succeeds Act, 20 U.S.C. § 7928 (2018).  
Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g (2018).

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<sup>2</sup> The term “invasive physical examination,” as defined by law, means any medical examination that involves the exposure of private body parts, or any act during such examination that includes incision, insertion, or injection into the body, but does not include a hearing, vision or scoliosis screening. The term does not include any physical examination or screening that is permitted or required by state law, including physical examinations or screenings that are permitted without parental notification.

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# OSBA Model Charter School Sample Policy

Code: KBA  
Adopted:

## Public Records Request\*\*

A request to inspect or receive a copy of a public record shall be in writing and will be presented to the [school] office.

A “public record” includes any writing that contains information relating to the conduct of the public’s business, prepared, owned, used or retained by the public charter school regardless of physical form or characteristics, unless otherwise exempted by law.<sup>1</sup> “Writing” means handwriting, typewriting, printing, photographing and every means of recording, including letters, words, pictures, sounds, or symbols or combination thereof and all papers, maps, files, facsimiles or electronic records. Public record does not include any writing that does not relate to the conduct of the public’s business and that is contained on a privately owned computer.

All such information will be made available to individuals with disabilities in an accessible format, upon request and with appropriate advanced notice. Auxiliary aids and services available to ensure equally effective communications to qualified persons with disabilities may include large print, Braille, audio recordings, readers, assistance in locating materials or other equally effective accommodations.

The Board supports the right of the people to know about programs and services of their schools and will make reasonable efforts to disseminate information. The administrator is authorized to use available means to keep parents and others in the particular school’s community informed about the school’s program and activities.

The Board reserves the right to establish a fee schedule which will reasonably reimburse the public charter school for the actual cost of making public records available pursuant to law. The public charter school will not be obligated to complete a request for which the requester has not paid the fee as permitted by state law. There will be no additional charge for auxiliary aids and services provided for persons with disabilities.

School employee and volunteer personal residential addresses, personal electronic mail addresses, social security numbers, dates of birth and personal telephone or cellular numbers, and other information listed in Oregon Revised Statute (ORS) 192.355 as exempt, contained in personnel records maintained by the school are exempt from public disclosure pursuant to ORS 192.363 - 368 and ORS 192.355(3). School electronic mail addresses assigned by the school to school employees are not exempt. This exemption does not apply to a substitute teacher, as defined in ORS 342.815, when requested by a professional education association of which the substitute teacher may be a member.

The public charter school will not disclose the identification badge or card of an employee without the employee’s written consent if the badge or card contains the employee’s photograph and the badge or card

<sup>1</sup> There are multiple definitions for “public record” in ORS 192. This definition comes from ORS 192.311 and applies to the inspection of records.

**Deleted:** “Public record” means any information that:

Is prepared, owned, used or retained by the public charter school;  
Is related to an activity, transaction or function of the public charter school; and  
Is necessary to satisfy the fiscal, legal, administrative or historical policies, requirements or needs of the public charter school.

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**Deleted:** A request to inspect or receive a copy of a public record shall be in writing and will be presented to the [administrator’s] office.  
Board meetings and records will be matters of public information subject to such restrictions as are set by federal law or regulation, by state statute or by pertinent court rulings.  
The Board’s official minutes, its written policies and its financial records will be available at the public charter school [administrator’s] office for inspection by any citizen desiring to examine them during hours when the [administrator’s] office is open.

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**Deleted:** Such information may be released only upon the written request of the employee or volunteer or as otherwise provided by law.

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was prepared solely for internal use by the public charter school to identify public charter school employees. A duplicate of the photograph used on the badge or card shall not be disclosed.

The public charter school shall not, in accordance with state law, disclose personal information for the purpose of enforcement of federal immigration laws.

The public charter school shall retain and maintain its public records in accordance with Oregon Administrative Rule (OAR) 166-005-0010 and Chapter 166, Division 400 and ORS Chapter 192.

END OF POLICY

**Legal Reference(s):**

[ORS 180.805](#)  
[ORS Chapter 192](#)

[ORS 338.115\(2\)](#)  
[OAR 137-004-0800\(1\)](#)

[OAR 166-005-0010](#)  
[OAR 166-400](#)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2021); 28 C.F.R. Part 35 (2021).

OREGON DEP'T OF JUSTICE, OREGON ATTORNEY GENERAL'S, *Public Records and Meetings Manual*.

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018).

*Bialostosky v. Cummings*, 319 Or. App. 352 (2022).

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# OSBA Model Charter School Sample Policy

Code: KBA-AR  
Revised/Reviewed:

## Public Records Request

In compliance with Oregon law the following guidelines apply to the dissemination, inspection and examination of the public records of the public charter school:

1. A public records request shall be submitted in writing through the school office at [address].
2. Upon receipt of a written request, the public charter school shall respond within five business days<sup>1</sup> acknowledging receipt of the request or completing<sup>2</sup> the public charter school's response to the request. If the public charter school provides an acknowledgment of the request, it must:
  - a. Confirm that the public charter school is the custodian of the requested record;
  - b. Inform the requester that the public charter school is not the custodian of the requested record; or
  - c. Notify the requester that the public charter school is uncertain whether the public charter school is the custodian of the requested record.
3. If the public charter school is the custodian of the requested record, as soon as reasonably possible but not later than 10 business days after the date the public charter school is required to acknowledge receipt of the request as described above, the public charter school shall:
  - a. Complete its response to the public records request in accordance with ORS 192.329(2). If the public charter school determines that a record is exempt from public disclosure, the public charter school will include a statement to that effect, and that the requester may appeal the decision pursuant to state law; or
  - b. Provide a written statement that the public charter school is still processing the request and a reasonable estimated date by which the public charter school expects to complete its response based on the information currently available.
4. The time periods, established by Oregon law and identified above in Section 2 or 3, will not apply to the public charter school if compliance would be impracticable because:
  - a. The staff or volunteers<sup>3</sup> necessary to complete a response to the public records request are unavailable;
  - b. Compliance would demonstrably impede the public charter school's ability to perform other necessary services; or

<sup>1</sup> "Business day" means a day other than Saturday, Sunday or a legal holiday, and on which at least one paid employee of the public charter school is scheduled to and does report to work.[ Business day does not include any day on which the [central administration office for the] public charter school is closed.]

<sup>2</sup> The public charter school response to a public records request will be considered complete when it complies with criteria in Oregon law (ORS 192.329).

<sup>3</sup> Staff member or volunteers who are on leave or are not scheduled to work are considered to be unavailable.

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c. Of the volume of the public records request being simultaneously processed by the public charter school.

In these situations, the public charter school shall, as soon as practicable and without unreasonable delay, acknowledge a public records request and complete the response to the request.

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5. The public charter school may request additional information or clarification from the requester for the purpose of expediting the public charter school's response to the request as permitted by law. If the public charter school requests additional information or clarification, in good faith, the obligation to complete the request is suspended until the requester provides the requested information or clarification or affirmatively declines to provide the information or clarification. If the requester fails to respond within 60 days to a good faith request from the school for information or clarification, the school shall close the request.

6. If a copy of a public record is requested, the public charter school will provide a single copy. If a request to inspect a public record is made and the record is maintained in a machine readable or electronic form, the custodian shall provide the record in the form requested, if available. If the public record is not available in the form requested, it will be made available in the form the record is maintained.

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7. If a person who is a party to a civil judicial proceeding to which the public charter school is a party or who has filed notice under Oregon Revised Statute (ORS) 30.275(5)(a) asks to inspect or to receive a copy of a public record that the person knows relates to the proceeding or notice, the individual must submit the request in writing to the designated custodian of public charter school records and at the same time to the public charter school's attorney.

8. Information will be made available to individuals with disabilities in an accessible format upon request and advance notice. Auxiliary aids and services available to qualified persons with disabilities may include large print, Braille, audio recordings, readers, assistance in locating materials or other equally effective accommodations.

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9. Where the labor effort exceeds 30 minutes, labor, material and out-of-pocket charges will be reimbursed to the public charter school. Labor will be calculated at the hourly rate of the employee affected. Materials and out-of-pocket charges will be reimbursed at the established rate of [\$.25 per page]. Auxiliary aids and services for qualified persons with disabilities will be available at no additional charge.

If the public charter school has informed the requester of a permitted fee, the obligation of the public charter school to complete its response to the request is suspended until the fee has been received by the public charter school. If the requester fails to pay the fee within 60 days of the date they were informed of the fee or fails to pay the fee within 60 days of the date on which the public charter school informed them of the denial of the fee waiver, the public charter school shall close the request.

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10. Deleted: The public charter school reserves the right to restrict the inspection of some public records to the public charter school's facilities.

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