



The Community Roots School Board Meeting

Tuesday, April 4, 2023 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 March 7th, 2023 Meeting Minutes
- Audience with Visitors (Audience members may make comments to the board on any topic)
(6:40)
- Administrator Report – Christen Kelly (6:50-6:55)
- Committee reports (Fundraising, Finance, Facilities) (6:55-7:05)
- Discussion Items and Actions (7:05-8:30)
 1. Board Nominations and Board Election Promotion
 - Discussion
 - Action
 2. Admin Evaluation
 - Discussion
 3. Onpoint Award Nominations
 - Discussion
 4. PTO
 - Discussion
 - Action
 5. Policy Updates - 1st readings (discussion/action if edited in real time)
 - AC-AR – Discrimination Complaint Procedure
 - GCBDF/GDBDF – Paid Family Medical Leave Insurance
 - GCBDF/GDBDF-AR – Paid Family Medical Leave Insurance
 - JFCF-AR – [Hazing,]Harassment, Intimidation, Bullying,
[Menacing,]Cyberbullying, or Teen Dating Violence Reporting Procedures –
Student
 - KL-AR(1) – Public Complaint Procedure

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 Mar 7th, 2022 Draft Minutes

Staff: Christen, Bridgett

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

Consent agenda: Feb 7th, 2023 minutes - Matt motions and Jackie seconds - all approve

Audience with Visitors: Bridgett said the Meadowlarks are busy raising money for the outdoor school. Talent show is coming up and teaming up with Cravehaven for dinner afterwards. Looking to add a couple other events to raise some more money. Bottle drop money is supposed to be for outdoor school which includes around \$900.

Colleen and Aaron from PTO - PTO report - brought a breakdown of the flow chart for separating PTO, fundraising and Marketing. PTO would create its own 501c3 to open its own bank account. PTO would have record keeping of required volunteer hours.

Discussion items: PTO follow up on next Board meeting.

Admin Report: Lottery for enrollment will be held on April 7th. Added an extra day of observations. There is an open house for prospective families next week. Outdoor school planning is ongoing. Upper El is going to Driftcreek camp after spring break. Meadowlarks are going to outdoor school in California in May. Accident on campus during indoor recess. Child hit their head and was taken to the hospital via ambulance. The child will be returning shortly, and all the necessary documentation was filed. Christen has been in contact with the district and school nurse for the transition plan for the student to return.

Fundraising: Desiree & Martin from Cravehaven came and discussed the Oktoberfest opportunity. Approx 1500 servings x \$25 per meal=\$37,500 this is just for meals and doesn't include any single servings. 15% is taken from Oktoberfest and \$5 fee per meal will be taken off the top by Cravehaven. Conservatively can make between \$25-\$30k. 4 hour shifts, 4 volunteers per shift. Total of 84 4 hour shifts from th 12th-18th. Volunteers would help with washing dishes, trash, scooping sides into 8 oz cups, register. They would use CRS Square account to run the register. Matt motions to approve and Jackie seconds - all approve to move forward with Oktoberfest.

Auction website and tickets are going on sale for the auction.

Facilities: No real updates on the facilities at this moment

Finance: Budget will be discussed

Discussion Items and Actions:

Budget - Adding in a TOSA and health benefits. ADM is at 98 and fundraising is at \$90,000. Health Plan will be budgeted for a family plan without TOSA.

Meeting to approve budget tentatively on Monday 13th.

Next Discussion item: Benefit packages - variables

Grange Termination Lease: Jackie motions to approve and Matt seconds - all approve

The Community Roots School April 2023 Administrator Report

Enrollment:

- Current as of 4.20.23: 94 students enrolled.

1. Enrollment

- a. Lottery to be held on Friday, April 7th
- b. As of 3.30.23 there are:
 - i. 23 in-district K applications (6 of which are siblings) and 3 out of District
 - ii. 2nd grade = 3 ID (2 siblings) and 1OOD
 - iii. 3rd grade = 7 ID (1 sibling)
 - iv. 3rd grade = 3 ID (1 sibling) and 1OOD
 - v. 4th Grade = 5 ID and 4 OOD
 - vi. 5th Grade = 2 ID and 1OOD

Projected enrollment for fall 2023 is ~109 students

2. District Communication

- a. Met with the Business Office team to clarify new Paid Leave Oregon process to go into effect for 2023/24.
- b. SpEd evaluations and consent/eligibility meetings continue to be conducted. SpEd Services continue for our students with IEPs and 504s.
- c. Christen met with Brandon Larson to talk about next year's SpEd staffing plans.
- d. Communication with the Bus Barn to coordinate transportation for Upper EI camping trip.

3. Educational Accountability & School News

- a. We have continued to see an increase in outside observers to our school – specifically to observe Kinder and Lower Elementary for potential new students. Additional day (Friday) was added to book observations.
- b. Upper Elementary students will travel to Straub Outdoor Camp April 3-6th.
- c. Spring Parent Teacher Conferences have been completed
- d. WiseMind will work with Lower Elementary and Adolescents on SEL and mindfulness for a 6 week session following Spring Break
- e. Open House on March 16th was held for prospective students and families.
- f. 5th grade students hosted a “6th Grade Experience” night for families on March 14th.
- g. SBAC testing dates will be scheduled for the second half of May.
- h. CogAT screeners have been completed.
- i. DERS will be conducted again in May
- j. Upper Elementary hosted a guest speaker for a Bike Clinic for 4-6th grade students.
- k. Alyssa led the charge for the Rainbow Trout release into Silver Creek with the blessing of the Dept of Fish and Wildlife. All students were invited to participate.

4. HR

- a. Interviews were conducted for new K Guide, and a job offer was given and accepted by Megan Rosevear.
- b. Interviews and hiring for additional Upper EI guide will take place after Spring Break.
- c. Staff Contracts for 2023/24 will be ready for board approval in May.

5. Budget & Finances



- a. Approved 2023/24 Budget was submitted to the DO
- b. Uploads for 22/23 FY audit prep will begin in May 2023.
- c. Completed SIA *Integrated Planning and Budget Template* was submitted to SFSD for the 2023-2025 biennium.

6. Community& Fundraising

- a. Continued promotion of CRS and programs at Silverton Farmer's Market booth.
- b. 7th and 8th grade students hosted a successful talent show and family dinner in conjunction with Crave Haven. All proceeds go towards funding their end of school camping trip.
- c. Banner has been up downtown for the last 2 weeks of March to promote CRS enrollment period.
- d. PTO is requesting to have their own bank account to so that some fundraising initiatives can be used to fund enrichment projects and other supportive endeavors.
- e. Volunteers and Room Parents have been helping out classrooms with their Auction projects.
- f. Plant sale is live – orders placed online can be picked up in May. Likewise, a second plant sale that is initiated by Alyssa's outdoor classroom will be held at the Silverton Farmer's Market on May 13th.
- g. Auction promotion, procurement and ticket sales are underway!

The Community Roots School
Statement of Financial Activities
As of 2/28/2023

	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Budget	
Description	8/31/2022	9/30/2022	10/31/2022	11/30/2022	12/31/2022	1/31/2023	2/28/2023	Approved Budget	Actual vs. Approved Budget
State School Fund—General Support	199,528.63	199,528.63	328,137.73	392,442.28	457,185.23	521,928.18	586,671.13	827,668.80	(305,740.62)
BEGINNING FUND BALANCE	-	-	-	-	171,212.39	171,212.39	171,212.39	-	171,212.39
SIA Funds	-	74,539.75	74,539.75	74,539.75	74,539.75	74,539.75	74,539.75	81,338.00	(6,798.25)
ESSER II	-	9,190.24	9,190.24	9,190.24	9,190.24	9,190.24	9,190.24	14,000.00	(4,809.76)
ESSER III	-	12,549.18	12,549.18	12,549.18	12,549.18	12,549.18	12,549.18	13,000.00	(450.82)
Fundraising	2,785.00	4,385.11	15,068.94	16,948.63	17,531.43	18,811.10	39,276.61	40,000.00	(21,188.90)
Grants	-	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00	3,000.00	-	3,000.00
Supply Fees	-	3,600.00	4,437.75	4,437.75	4,437.75	4,437.75	4,497.75	5,250.00	(812.25)
Recharge Café	-	-	728.28	1,329.81	1,610.49	2,250.32	2,921.17	-	2,250.32
Total Revenue	202,313.63	306,792.91	447,651.87	514,437.64	751,256.46	817,918.91	903,858.22	981,256.80	(163,337.89)
General Funding									
Salaries	(15,453.82)	(56,389.98)	(104,246.56)	(150,195.56)	(195,462.28)	(240,241.08)	(285,824.16)	(503,953.86)	263,712.78
Substitute & Temporary Wages	-	-	-	(49.21)	(49.21)	(298.46)	(796.96)	(13,500.00)	13,201.54
Benefits	(5,669.50)	(16,725.02)	(28,611.79)	(39,681.93)	(50,813.62)	(64,552.82)	(76,928.03)	(129,064.83)	64,512.01
PERS	(1,983.33)	(7,553.01)	(13,556.55)	(19,171.89)	(24,727.72)	(30,207.93)	(35,859.05)	(108,048.51)	77,840.58
Computer Expenses	(1,008.00)	-	(5,890.83)	(2,570.63)	(3,178.67)	(3,786.71)	(9,336.90)	-	(3,786.71)
Consumable Supplies and Materials	(1,683.46)	(3,057.85)	(6,032.56)	(8,142.21)	(6,389.52)	(5,331.36)	(9,848.66)	(7,600.00)	2,268.64
Dues and Fees	-	(416.84)	(2,078.94)	(828.94)	(1,375.54)	(1,375.54)	(2,773.55)	(2,000.00)	624.46
Insurance	(7,116.00)	(7,116.00)	(7,116.00)	(7,256.00)	(7,804.83)	(7,804.83)	(7,804.83)	(7,500.00)	(304.83)
Professional Development	-	-	-	-	-	-	-	-	-
Professional Services	-	-	(718.20)	(718.20)	(718.20)	(11,252.35)	(12,150.10)	(18,000.00)	6,747.65
Rent	(637.60)	(956.40)	(4,290.42)	(1,862.30)	(2,462.30)	(2,462.30)	(5,046.32)	(55,000.00)	52,537.70
Rental - Other	(268.20)	(5,400.03)	(12,881.13)	(14,029.23)	(20,321.33)	(21,055.43)	(29,507.58)	(5,750.00)	(15,305.43)
Repairs and Maintenance	-	-	-	-	-	-	-	-	-
Transportation	-	-	-	-	(72.60)	(84.00)	(102.60)	(1,000.00)	916.00
Utilities	(691.72)	(1,207.40)	(1,922.78)	(2,268.64)	(3,425.81)	(3,425.81)	(4,211.14)	(6,100.00)	2,674.19
Other Expense	-	(5,135.00)	(13.80)	(39.60)	-	-	-	(5,000.00)	5,000.00
Total General Funding	(34,511.63)	(103,957.53)	(187,359.56)	(246,814.34)	(316,801.63)	(391,878.62)	(480,189.88)	(862,517.20)	470,638.58
SIA Funds									
Professional Development	-	-	-	-	-	-	-	(1,164.44)	1,164.44
Admin Salary - 40% 2022-23	-	(3,150.69)	(3,150.69)	-	(3,150.69)	(3,150.69)	(3,150.69)	(28,628.74)	25,478.05
Employer Burden Admin 2022-23	-	-	-	-	-	-	-	(9,997.50)	9,997.50
Non-Licensed Salary (AB) 2022-23	-	-	-	-	-	-	-	(31,000.00)	31,000.00
Employer Burden (AB) 2022-23	-	-	-	-	-	-	-	(10,547.32)	10,547.32
Total SIA Funds	-	(3,150.69)	(3,150.69)	-	(3,150.69)	(3,150.69)	(3,150.69)	(81,338.00)	78,187.31
ESSER II									
Professional Development - STAFF	1,300.00	(1,300.00)	(1,300.00)	(1,300.00)	(1,300.00)	(1,300.00)	(1,300.00)	(4,000.00)	2,700.00
Technology	1,528.77	(3,966.72)	(3,966.72)	(3,966.72)	(3,966.72)	(3,966.72)	(3,966.72)	(8,500.00)	4,533.28
PPE & Air Filtration	1,055.25	(4,158.38)	(4,158.38)	(4,424.34)	(4,424.34)	(4,424.34)	(4,424.34)	(1,500.00)	(2,924.34)
Total ESSER II	3,884.02	(9,425.10)	(9,425.10)	(9,425.10)	(9,691.06)	(9,691.06)	(9,691.06)	(14,000.00)	4,308.94

ESSER III									
Non-Licensed Salary (AB)	-	-	-	-	-	-	-	(7,919.99)	7,919.99
Intervention Programs/STAR	-	-	-	-	-	-	-	(5,080.01)	5,080.01
Total ESSER III	-	-	-	-	-	-	-	(13,000.00)	13,000.00
Citizen Bank									
Fundraising Expense			(420.00)	(420.00)	(2,177.00)	(2,177.00)	(1,757.00)	-	(2,177.00)
Merchant Fees			(84.58)	(173.27)	(173.27)	(198.82)	(247.94)	-	(198.82)
Fund Purchase	(5,135.00)		(5,135.00)	(5,135.00)	(10,624.05)	(15,796.38)	(14,441.02)	-	(15,796.38)
Other School Related Expense	-	-	420.00	420.00	420.00	420.00	(1,842.24)		
Total Citizen Bank	(5,135.00)	-	(5,219.58)	(5,308.27)	(12,554.32)	(17,752.20)	(18,288.20)	-	(18,172.20)
			-						
Cont Fund 1.25% of SSF Revenue	-	-	-	-	-	-	-	(10,345.86)	10,345.86
Reserve Fund .6% off of SSF Revenue	-	-	-	-	-	-	-	(4,966.01)	4,966.01
Total Expense	(30,627.61)	(116,533.32)	(205,154.93)	(261,547.71)	(342,197.70)	(422,472.57)	(511,319.83)	(986,167.07)	563,274.50
Net Revenue (Expense)	171,686.02	190,259.59	242,496.94	252,889.93	409,058.76	395,446.34	392,538.39	(4,910.27)	399,936.61
Citizens Bank Balance		164,432.17	175,249.17	178,369.98	171,987.41	168,769.03	189,789.39		

Community Roots School 2021 Board of Directors Nomination Form

This form may be used by anyone in our community to nominate individuals to serve on the Community Roots School Board. Please return the completed form to the school, **by Monday April 11th.**

Nominee : _____

Employer and Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: (Cell) (____) _____ (Home) (____) _____ Email: _____

Do you know this individual personally? (please circle) Yes No

If yes, for how long and in what capacity?

Have you already spoken with this individual about a possible board candidacy? Yes No

Please provide other details that may be relevant or helpful to the committee.

In your opinion, what relevant experience, background, skills or access to community resources would this individual bring to the CRS Board? (continue on the back of this page if necessary)

Your Name: _____ Relationship to CRS: _____

Phone Number: _____ Email Address: _____

Community Roots School
Board of Directors Application Form

Please complete and return this form along with a signed Board Position Description and the background check information request in the enclosed self-addressed envelope by **Friday, April 22nd**. Thank you for your interest.

Name _____ Phone _____

Address _____

Relevant volunteer and/or employment experience (attach a resume if relevant):

Why are you interested in serving as a Board Director of Community Roots School?

Area(s) of expertise/contributions you feel you can make to Community Roots as a Board Director:

Other current volunteer commitments:

Potential conflicts of interest: Do you have a child who attends or will attend Community Roots School? Do you have a family member who works for Community Roots School? Do you have a family member who works for or is on the board of the Silver Falls School District?

Community Roots School

Board of Director's Position Description

Mission

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.

For more information, please the Community Roots School website at www.crmontessori.org

Position

The Board will support the work of Community Roots School (CRS) and provide mission-based leadership and strategic governance. While day-to-day operations are led by the CRS Administrator, the Board-Administrator relationship is a partnership, and the appropriate involvement of the Board is both critical and expected.

Specific Board Member responsibilities include:

- Provide policy and financial governance and oversight for the school
- Review outcomes and metrics created by CRS used to evaluate the impact of the strategic plan, and regularly measure its performance and effectiveness using those metrics. Serve as an advisor to the Administrator as they develop and implement the CRS strategic plan
- Approve the CRS annual budget, audit reports, and material business decisions
- Be informed of, and meeting all, legal and fiduciary board member responsibilities
- Select the administrator and contribute to an annual performance evaluation of the Administrator
- Partner with the Administrator and other board members to ensure that board resolutions are carried out
- Review agenda and supporting materials prior to board and committee meetings
- Assist the board chair in identifying and recruiting other board members
- Assess board performance
- Serve on at least one committee or task force and take on special assignments
- Represent CRS to stakeholders; acting as an ambassador for the school
- Participate in fundraising activities

CRS Board Members will consider CRS a philanthropic priority and make annual gifts that reflect that priority. So that CRS can credibly solicit contributions from foundations, organizations, and individuals, CRS expects to have 100 percent of Board Members make an annual contribution that is commensurate with their capacity.

Board terms/participation

CRS Board Members will serve a two-year term and then be eligible for re-appointment if desired. Board meetings will be held most months and committee meetings will be held as needed.

Qualifications

This is an opportunity for an individual who is passionate about the CRS mission and who has a track record of leadership. Selected Board Members will have achieved leadership stature in business, government, philanthropy, or the nonprofit sector. His/her accomplishments will allow him/her to attract other well-qualified, high-performing Board Members.

Ideal candidates will have the following qualifications:

Professional experience with leadership accomplishments in business, government, philanthropy, or education

A commitment to and understanding of the needs of the children and families of CRS

Savvy diplomatic skills and a natural affinity for cultivating relationships and persuading, convening, facilitating, and building consensus among diverse individuals

Personal qualities of integrity, credibility, and a passion for improving the education experience for CRS children

OSBA Model Charter School Sample Policy

Code: AC-AR
Adopted:

Discrimination Complaint Procedure

Complaints regarding discrimination or harassment, on any basis protected by law, shall be processed in accordance with the following procedures:

Step 1 Complaints may be oral or in writing and should be filed with the [administrator] ~~[director]~~. Any staff member that receives a written or oral complaint shall report the complaint to the [administrator] [director].

The [administrator] ~~[director]~~ shall investigate and determine the action to be taken, if any, and reply in writing to the complainant within [10] school days of receipt of the complaint.

Step 2 If the complainant is not satisfied with the decision of the [administrator] ~~[or designee]~~, a written appeal may be filed with the Board within [five] school days of receipt of the [administrator's] ~~[or designee's]~~ response in Step 1. The Board may decide to hear or deny the request for appeal at a Board meeting. If the Board decides to hear the appeal, the Board may meet with the concerned parties and their representative at ~~[the next regular or special Board meeting]~~ [a Board meeting]. The Board's decision will address each allegation in the complaint and contain the reasons for the Board's decision. A copy of the Board's decision shall be sent to the complainant in writing within [30] days of receipt of the appeal by the Board.

If the Board decides not to hear the appeal the administrator's decision is final.

If the [administrator] ~~[director]~~ is the subject of the complaint the individual may start at Step [2] and file a complaint with the ~~[director]~~ [Board chair]. [The Board may refer the investigation to a third party.]

Complaints against the Board as a whole or against an individual Board member may start at Step [2], should be submitted to the Board chair, and may be referred to counsel. Complaints against the Board chair may start at Step [2] and should be referred directly to ~~[counsel]~~ [the Board vice chair].

[Timelines may be extended based upon mutual consent of the public charter school and the complainant [in writing].]

Appeal Process

A decision reached by this public charter school board for a complaint that alleges a violation of OAR 581-021-0047 (Prohibition against using Native American mascots) may be appealed to Oregon Department of Education (ODE) under OAR 581-002-0001 - 581-002-0023.

~~[1]~~

¹ The public charter school board is strongly encouraged to have a discussion with their sponsor about the next step for a complainant – choose one of the following bracketed options.

Deleted: |

Deleted: this meeting

Deleted: |

Deleted: |

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[A decision reached by this public charter school board for a complaint that alleges a violation of Oregon Revised Statute (ORS) 659.850 or Oregon Administrative Rule (OAR) 581-021-0045 or OAR 581-021-0046 (Discrimination), may be appealed to the board of the [Silver Falls School District]. The complainant may file such appeal with the [superintendent] [Board chair] of the [Silver Falls School District]. A final decision reached by the Board of [the Silver Falls School District] may be appealed to ODE under OAR 581-002-0001 - 581-002-0023.]

OR

[A final decision reached by the public charter school board for a complaint that alleges a violation of Oregon Revised Statute (ORS) 659.850 or Oregon Administrative Rule (OAR) 581-021-0045 or OAR 581-021-0046 (Discrimination), is recognized as the final decision regarding this complaint³ by the Board of [the Silver Falls School District]. A final decision may be appealed to ODE under OAR 581-002-0001 - 581-002-0023.]

Insert the name of the public charter school's sponsor/sponsoring district.

³ The public charter school board is given this authority by the school's sponsor, [name of school sponsor], as established by [the charter agreement] [Board policy] [a resolution of the [name of school sponsor] board].

Deleted: []
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The Community Roots School
DISCRIMINATION COMPLAINT FORM

Name of Person Filing Complaint Date School or Activity

Student/Parent Employee Job applicant Other _____

Subject of complaint:

- | | | |
|--|---|---|
| <input type="checkbox"/> Race | <input type="checkbox"/> Familial status | <input type="checkbox"/> Income level |
| <input type="checkbox"/> Color | <input type="checkbox"/> Economic status | <input type="checkbox"/> Athletic ability |
| <input type="checkbox"/> Religion | <input type="checkbox"/> Veterans' status | <input type="checkbox"/> Proficiency in English language |
| <input type="checkbox"/> Sex | <input type="checkbox"/> Age | <input type="checkbox"/> Discriminatory use of a Native American mascot |
| <input type="checkbox"/> National or ethnic origin | <input type="checkbox"/> Sexual orientation | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Mental or physical disability | <input type="checkbox"/> Gender identity | |
| <input type="checkbox"/> Marital status | <input type="checkbox"/> Pregnancy | |

Specific complaint: (Please provide detailed information including names, dates, places, activities and results of discussion.)

Who should we talk to and what evidence should we consider?

Suggested solution/resolution/outcome:

This complaint form should be mailed or submitted to the administrator.

Direct complaints related to educational programs and services may be made to the U.S. Department of Education, Office for Civil Rights. Direct complaints related to employment may be filed with the Oregon Bureau of Labor and Industries, Civil Rights Division or the U.S. Department of Labor, Equal Employment Opportunities Commission.

OSBA Model Charter School Sample Policy

Code: GCBDF/GDBDF
Adopted:

Paid Family Medical Leave Insurance *

The public charter school participates in Paid Family and Medical Leave Insurance (PFMLI) and Paid Leave Oregon (PLO)¹. This includes submitting employee and employer contributions to the Employment Department (“Department”) as required by state law.² The public charter school does not administer PFMLI or PLO. All applications and questions should be directed to the Department.

Definitions

1. “Family leave” means leave from work taken by a covered individual:
 - a. To care for and bond with a child during the first year after the child’s birth or during the first year after the placement of the child through foster care or adoption; or
 - b. To care for a family member with a serious health condition.
2. “Family leave” does not mean:
 - a. Leave described in Oregon Revised Statute (ORS) 659A.159 (1)(d) (non-serious health condition of child or school or child care provider closure due to public health emergency);
 - b. Leave described in ORS 659A.159 (1)(e) (death of a family member); or
 - c. Leave authorized under ORS 659A.093 (leave for spouses of members of the military upon deployment or call to active duty).
3. “Family member” means:
 - a. The spouse of a covered individual;
 - b. A child of a covered individual or the child’s spouse or domestic partner;
 - c. A parent of a covered individual or the parent’s spouse or domestic partner;
 - d. A sibling or stepsibling of a covered individual or the sibling’s or stepsibling’s spouse or domestic partner;
 - e. A grandparent of a covered individual or the grandparent’s spouse or domestic partner;
 - f. A grandchild of a covered individual or the grandchild’s spouse or domestic partner;
 - g. The domestic partner of a covered individual; or
 - h. Any individual related by blood or affinity whose close association with a covered individual is the equivalent of a family relationship.

¹ Paid Leave Oregon is the program developed by the Oregon Department of Employment to administer Paid Family and Medical Leave Insurance.

² The overall contribution will be determined by the Department director, and is initially set at 1 percent (up to \$132,900). [*For public charter schools with 25 or more employees:*] The employer contribution is 40 percent and the employee contribution is 60 percent of this amount. [*For public charter schools with fewer than 25 employees:*] The employee contribution is 60 percent of this amount and the employer contribution is waived.] The amount will be set annually by November 15. See ORS 657B.150.

4. “Medical Leave” means leave from work taken by a covered individual that is made necessary by the individual’s own serious health condition.
5. “Safe leave” means related to domestic violence, harassment, sexual assault, stalking and relocation for health and safety reasons as provided in ORS 659A.272.
6. “Serious health condition” means an illness, injury, impairment, or physical or mental condition of a claimant or their family member that:
 - a. Requires inpatient care in a medical care facility such as, but not limited to, a hospital, hospice, or residential facility such as, but not limited to, a nursing home or inpatient substance abuse treatment center;
 - b. In the medical judgment of the treating health care provider poses an imminent danger of death, or that is terminal in prognosis with a reasonable possibility of death in the near future;
 - c. Requires constant or continuing care, including home care administered by a health care professional;
 - d. Involves a period of incapacity. “Incapacity” is the inability to perform at least one essential job function, or to attend school or perform regular daily activities for more than three consecutive calendar days. A period of incapacity includes any subsequent required treatment or recovery period relating to the same condition. The incapacity must involve one of the following:
 - (1) Two or more treatments by a health care provider; or
 - (2) One treatment plus a regimen of continuing care.
 - e. Results in a period of incapacity or treatment for a chronic serious health condition that requires periodic visits for treatment by a health care provider, continues over an extended period of time, and may cause episodic rather than a continuing period of incapacity, such as, but not limited to, asthma, diabetes, or epilepsy;
 - f. Involves permanent or long-term incapacity due to a condition for which treatment may not be effective, such as, but not limited to, Alzheimer’s Disease, a severe stroke, or terminal stages of a disease. The employee or family member must be under the continuing care of a health care provider, but need not be receiving active treatment;
 - g. Involves multiple treatments for restorative surgery or for a condition such as, but not limited to, chemotherapy for cancer, physical therapy for arthritis, or dialysis for kidney disease that if not treated would likely result in incapacity of more than three calendar days;
 - h. Involves any period of disability due to pregnancy, childbirth, miscarriage or stillbirth, or period of absence for prenatal care; or
 - i. Involves any period of absence from work for the donation of a body part, organ, or tissue, including preoperative or diagnostic services, surgery, post-operative treatment, and recovery.

Eligibility

1. To be eligible for PLO benefits, an individual must:

- a. Be an employee of the public charter school³;
- b. Earn at least \$1,000 in the base or alternate base year⁴;
- c. Contribute to the PLO in accordance with state law;
- d. Experience an event qualifying the employee for:
 - (1) Family leave;
 - (2) Medical leave; or
 - (3) Safe leave.
- e. Submit an application to Department;
- f. Have not exceeded maximum paid leave for the year; and
- g. Have no current disqualifications⁵.

Leave

PLO can be used for family leave, medical leave or safe leave. Up to 12 weeks of paid leave can be taken per benefit year.⁶ Leave can be taken in one-day increments and can be consecutive or nonconsecutive.

Any family leave or medical leave taken under PLO must be taken concurrently with any leave taken by an eligible employee under ORS 659A.150 - 659A.186 (OFLA) or under the federal Family and Medical Leave Act of 1993 (P.L. 103-3, FMLA) for the same purposes.

The public charter school will maintain an employee's existing health benefits while the employee is using leave. The employee will be required to pay the employee's contribution to premiums.

END OF POLICY

Legal Reference(s):

[ORS 657B](#)

[OAR 471-070](#)

³ PFMLI is a state-wide benefit, and not unique to the public charter school. An eligible individual does not need to be an employee of the public charter school in order to be eligible for PFMLI, but this policy only applies to employees of the public charter school.

⁴ Pay could come from another Oregon employer.

⁵ Disqualifications may include eligibility for Workers' Compensation or Unemployment or determination of a willful false statement or failure to report a material fact in order to obtain benefits. See OAR 471-070-1010(1)(h).

⁶ In some pregnancy-related situations, employees may be able to take two additional weeks, for a total for 14 weeks.

OSBA Model Charter School Sample Policy

Code: GCBDF/GDBDF-AR
Revised/Reviewed:

Paid Family Medical Leave Insurance (PFMLI)

Application

Employees may submit applications for Paid Leave Oregon (PLO) to the Oregon Employment Department (“Department”).¹ Applications may be submitted up to 30 days prior to the start of the leave and up to 30 days after the start of the leave.² The Department may require verification from the employee.³ The Department will make all decisions regarding acceptance and denial of an application, including determining the amount of the benefit.⁴ The public charter school cannot accept, file, process or make decisions on applications.

An employee may appeal an approval or denial of claim, the amount of a weekly benefit or a disqualification from receipt of benefits to the Department in accordance with Oregon Revised Statute (ORS) 657B.010 and Oregon Administrative Rule (OAR) 471-070-2220.

Employee Notice to Public Charter School

If the leave is foreseeable⁵, the employee must provide the public charter school with written notice⁶ at least 30 calendar days prior to the leave.^{7} If the leave is not foreseeable⁸ the employee must give oral notice to the public charter school within 24 hours of the start of the leave, and must provide written notice within 3 days after the start of leave.⁹ The public charter school requests as much advanced notice as possible.

¹ For application requirements see ORS 657B.060 and Oregon Administrative Regulation (OAR) 471-070-1100. *{Include link to Department website once available.}*

² Exceptions may be granted when the applicant can demonstrate good cause for late submission.

³ See verification requirements in OAR 471-070-1110 - OAR 471-070-1130.

⁴ The benefit may be less than the employee’s salary. See ORS 657B.050.

⁵ Examples of foreseeable leave include, but are not limited to, an expected birth, planned placement of a child, or a scheduled medical treatment for a serious health condition of the eligible employee or a family member of the eligible employee. See OAR 471-070-1310(1).

⁶ Written notice includes, but it not limited to, handwritten or typed notices, and electronic communication such as text messages and email.

⁷ *{OAR 471-017-1310(5) states “An employer that requires eligible employees to provide a written notice before the eligible employee commences leave, must outline the requirement in the employer’s written policy and procedures.”}*

⁸ Leave circumstances that are not foreseeable include, but are not limited to, an unexpected serious health condition of the eligible employee or a family member of the eligible employee, a premature birth, an unexpected adoption, an unexpected foster placement by or with the eligible employee, or for safe leave.

⁹ If other leave also applies (OFLA, FMLA, etc.), notice requirements for those types of leave may also apply.

The notice must include:

1. The employee's first and last name;
2. Type of leave;
3. Explanation of the need for leave; and
4. Anticipated timing and duration of leave, including if it is continuous or intermittent.

Notice need only be given one time, but the employee shall notify the public charter school as soon as practicable if dates of scheduled leave change, are extended, or were initially unknown. This notice does not need to mention PFMLI or PLO to satisfy the notice requirements.^{10}

Failure to comply with these notice requirements may result in a penalty imposed by the Department. The Department may reduce the amount of the benefit by 25 percent in accordance with OAR 471-070-1310(9)-(10).

Concurrent Use of Public Charter School-Provided Paid Leave^{11}

The public charter school ~~[allows]~~ [does not allow] employees to use employer-provided paid leave in addition to receiving PLO benefits to replace an employee's wages up to 100 percent of the eligible employee's average weekly wage. Example:

An employee applies and is approved for PLO for a personal serious medical condition. The Department determines that the rate of pay will be 75 percent of the employee's regular salary. [The employee will not be allowed to use charter school-provided paid leave (sick, vacation or otherwise) for days that PFMLI is received.] ~~[The employee will be allowed to use available charter school-provided paid leave (sick, vacation or otherwise) for days that PLO is received, but is limited to only utilizing an amount that increases the employee paid leave to 100 percent of regular payment. In this example, the amount would be 25 percent.]~~

Return to Work

Upon completion of leave, the employee is entitled to return to the position held in the public charter school prior to the leave, if that position still exists and if the employee had been employed in the public charter school for 90 days prior to taking leave.¹² ~~[[For public charter schools with 25 or more employees:] If the position no longer exists, the employee is entitled to a position equal to their previous position, with equal benefits, pay and other terms and conditions of employment.]~~ ~~[[For public charter schools with fewer than 25 employees:] If the position no longer exists, the employee may be placed in a different position with similar job duties and benefits and pay equal to the previous position.]~~

¹⁰ {A public charter school requiring written notice must outline the requirements in policy and procedures. A copy of the written policy and procedure must be provided to all eligible employees at the time of hire and each time the policy and procedure changes and in the language that the employer typically uses to communicate with the employee.}

¹¹ {Consider any bargaining requirements prior to adopting this language.}

¹² If the employee's leave also qualifies for OFLA/FMLA protection, see also Board policy GCBDA/GDBDA - Family Medical Leave and its accompanying administrative regulations.

Communications Between the Public Charter School and the Department

Upon receipt of an application or update in information from a public charter school employee for PLO, the Department will notify the public charter school. The public charter school may provide additional information to the Department within 10 days. This information may include, but is not limited to, information about the employee's notice to the public charter school or verification of the employee's continued employment with the public charter school. If the public charter school does not report such information to the Department, the Department will proceed using available information. The public charter school can provide additional information to the Department as it becomes available.

If the Department requests additional information from the public charter school, the public charter school will respond within 10 calendar days.

Once the Department has issued a decision regarding an application submitted by an employee of the public charter school, the Department will notify the public charter school regarding the approval or denial and any applicable dates and periods of leave. The public charter school cannot appeal a Department decision.

Public Charter School Notice to Employees

At the time of hire and each time the policy or procedure changes, the public charter school must provide notice to employees. This notice must be in the language that the employer typically uses to communicate with employees and will include:

1. The right of an eligible employee to claim and receive family and medical leave insurance benefits;
2. The procedure for filing a claim for benefits;
3. That an eligible employee must provide notice to the public charter school before the employee commences leave, and a description of the penalties for failure to comply with the notice requirements;
4. The right of an eligible employee to job protection and benefits continuation;
5. The right of an eligible employee to appeal a decision or determination made by the Department director;
6. That discrimination and retaliatory personnel actions against an employee for inquiring about the PFMLI or PLO, taking leave under the program or claiming PFMLI or PLO benefits are prohibited;
7. The right of an employee to bring a civil action or to file a complaint for violation of ORS 657B.060 or 657B.070; and
8. That any health information related to family leave, medical leave or safe leave provided to an employer by an employee is confidential and may not be released without the permission of the employee unless state or federal law or a court order permits or requires disclosure.¹³

¹³ Paid Leave Oregon will provide a model notice, <https://paidleave.oregon.gov/DocumentsForms/Paid-Leave-ModelNotice-Poster-EN.pdf>. This policy can also be used as the notice.

The public charter school will display this notice in an area that is accessible to and regularly frequented by employees in each building or worksite. The public charter school will provide this notice to employees working remotely by hand delivery, regular mail or through an electronic delivery method at the time of hire or assignment to remote work.

Public Charter School Filings

The public charter school will file the Oregon Quarterly Tax Report, the Oregon Employee Detail Report and any other reports required by law. If the public charter school fails to submit required filings or report, or fails to pay all required contributions, the public charter school may be penalized in accordance with OAR 471-070-8520.

{For public charter schools with fewer than 25 employees:}[The public charter school may apply for an assistance grant.¹⁴]

Employee Protections

No employee or prospective employee will be discriminated or retaliated against for inquiring about PFMLI or PLO, giving notification of leave under PLO, taking PLO leave or claiming PLO benefits. Eligible employees have a right to file a complaint and/or bring a civil action for violations of ORS 657B.060 or ORS 657B.070.

Any health information related to family leave, medical leave or safe leave provided to the public charter school by an employee is confidential and may not be released without the permission of the employee unless state or federal law or a court order permits or requires disclosure.

¹⁴ See OAR 471-070-3705 - 3710 for eligibility requirements and application.

OSBA Model Charter School Sample Policy

Code: JFCF-AR
Revised/Reviewed:

[Hazing,]Harassment, Intimidation, Bullying, [Menacing,]Cyberbullying, or Teen Dating Violence Reporting Procedures – Student

The [administrator]¹ [has] [have]-responsibility for investigations concerning acts of [hazing,] harassment, intimidation or bullying, [menacing,]acts of cyberbullying, and incidents of teen dating violence. The investigator(s) shall be a neutral party having had no involvement in the report presented.

All reports will be investigated in accordance with the following procedures:

- Step 1 Any reports or information on acts of [hazing,]harassment, intimidation or bullying, [menacing,] acts of cyberbullying, or incidents of teen dating violence (e.g., complaints, rumors) shall be presented to the [administrator]. Reports against the administrator shall be filed with the Board chair. All such information will be reduced to writing and will include the specific nature of the offense and corresponding dates.
- Step 2 The [administrator] receiving the report shall promptly investigate. Parents will be notified of the nature of any report involving their student. The [administrator] will arrange such meetings as may be necessary with all concerned parties within [five] working days after receipt of the information or report. The parties will have an opportunity to submit evidence and a list of witnesses. All findings related to the report will be reduced to writing. The public charter school official(s) conducting the investigation shall notify the person making the report within [10] working days of receipt of the information or report, and parents as appropriate, [in writing] when the investigation is concluded and a decision regarding disciplinary action, as warranted, is determined.
- Step 3 If the person making the report is not satisfied with the decision at Step 2, they may submit a written appeal to the Board. Such appeal must be filed within [10] working days after receipt of the Step 2 decision. The Board shall, within [20] working days, conduct a hearing at which time the person making the report shall be given an opportunity to present the report. The Board shall provide a written decision to the person making the report within [30] working days of receipt of the appeal by the Board.

Reports against the administrator may start at step 3 and should be referred to the Board chair on behalf of the Board. The Board chair shall present the report to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide in open session what action, if any, is warranted. A final decision will be made within [30] days of receipt of the report.

¹Required by ORS 339.356(2)(g). Other bracketed language regarding hazing and menacing exceeds the requirements of ORS 339.356 and is under Board authority ORS 338.115.

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Timelines may be extended upon written agreement between both parties. This also applies to reports filed against the administrator or any Board member.

Direct complaints of discriminatory harassment related to educational programs and services may be made to the Regional Civil Rights Director, U.S. Department of Education, Office for Civil Rights, Region X, 915 Second Ave., Room 3310, Seattle, WA 98174-1099.

Documentation related to the incident may be maintained as a part of the student's education records. [Additionally, a copy of all reported acts of [hazing,]harassment, intimidation or bullying, [menacing,]acts of cyberbullying, and incidents of teen dating violence reports and documentation will be maintained as a confidential file in the [CRS] [front] office.]

OSBA Model Charter School Sample Policy

Code: **KL-AR**
Revised/Reviewed:

Public Complaint Procedure

A parent or guardian of a student attending the public charter school [, a staff member][, a student][or patron of the public charter school] who wishes to express a concern should discuss the matter with the public charter school employee involved. If the concern remains unresolved, a complaint may be filed.

An individual or organization that alleges the public charter school is violating or has violated provisions of restraint or seclusion in Oregon Revised Statute (ORS) 339.285 - 339.303 or Oregon Administrative Rule (OAR) 581-021-0550 - 581-021-0570 (Restraint or Seclusion) is encouraged to initiate Step One of this complaint procedure and file a complaint with the administrator.

The [Administrator]: Step One:

A complainant may file a complaint with the [administrator] clearly stating the nature of the complaint and a suggested remedy. A form is available, but is not required.

The [administrator] shall investigate the complaint, confer with the complainant and the parties involved, prepare a report of the findings and conclusion, and provide a report [in writing or in an electronic form] to the complainant within [five] working days of receipt of the complaint.

The Board: Step Two

If the complainant is dissatisfied with the [administrator's] [~~director's~~] findings and conclusion, the complainant may appeal the decision to the Board within [five] working days of receiving the [administrator's] [~~director's~~] decision. The Board will review the findings and conclusion of the [administrator] [~~director~~] in a public meeting to determine what action is appropriate. The Board may use executive session if the subject matter qualifies under Oregon law. Appropriate action may include, but is not limited to, holding a hearing, requesting additional information, and adopting the [administrator's] [~~director's~~] decision as the public charter school board's decision. All parties involved may be asked to attend such hearing for the purposes of making further explanations and clarifying the issues.

The complainant shall be informed of the Board's decision within [30] days from the receipt of the appeal to the Board. The Board's decision will address each allegation in the complaint and contain reasons for the Board's decision. The Board's decision will be final.

If the Board chooses not to hear the complaint the [administrator's] [~~director's~~] decision is final.

[The complaint procedure will not be longer than 90 days from the filing date of the original complaint with the [administrator] [~~director~~]. The timelines may be extended upon written agreement between the public charter school and the complainant.]

Complaints against the administrator should be filed with the [~~director~~] [Board chair on behalf of the Board]. [~~The director will attempt to resolve the complaint. If the complaint remains unresolved after [10]~~

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working days of receipt by the director, the complainant may request to place the complaint on the Board agenda [at the next regularly scheduled or special Board meeting].] [The Board chair shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board may use executive session if the subject matter qualifies under Oregon law. The Board shall decide, within [20] days, in open session what action, if any, is warranted. The written final decision of the Board regarding the complaint shall be issued by the Board within [30] days of receipt of the complaint by the Board.]

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Complaints against the Board as a whole or against an individual Board member should be referred to the Board chair on behalf of the Board. The Board chair shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. The Board shall decide in open session what action if any, is warranted. The written final decision of the Board regarding the complaint shall be issued by the Board within [30] days of receipt of the complaint.

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Complaints against the Board chair should be referred directly to the [public charter school counsel] [Board vice chair] on behalf of the Board. The [public charter school counsel] [Board vice chair] shall present the complaint to the Board in a Board meeting. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete the results will be presented to the Board. The Board shall decide in open session what action, if any, is warranted. The written decision of the Board regarding the complaint shall be issued by the Board within [30] days of receipt of the complaint.

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The timelines may be extended upon written agreement between the public charter school and the complainant.

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Appeal Process

[1]

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[A final decision reached by the public charter school board for a complaint that alleges a violation of ORS 339.285 - 339.303 or OAR 581-021-0550 - OAR 581-021-0570 (Restraint or Seclusion), ORS 659.852 (Retaliation), or applicable OAR Chapter 581, Division 22 (Division 22 Standards), may be appealed to the board of the [Silver Falls School District]². The complainant may file such appeal with the [superintendent] [Board chair] of the [school sponsor]. A final decision reached by the Board of the [school sponsor] will be the district’s final decision and may be appealed to the Oregon Department of Education under OAR 581-002-0003 - 581-002-0005.]

OR

[A final decision reached by the public charter school board for a complaint that alleges a violation of ORS 339.285 - 339.303 or OAR 581-021-0550 - OAR 581-021-0570 (Restraint or Seclusion), ORS 659.852 (Retaliation), or applicable OAR Chapter 581, Division 22 (Division 22 Standards), is recognized as the

[¹ The public charter school board is strongly encouraged to have a discussion with the school’s sponsor/sponsoring district, about the next step for a complainant – choose one of the following options.]

² The public charter school’s sponsor will hear this appeal as established through [the charter agreement] [Board policy] [a resolution] of the [name of school sponsor] board.

final decision regarding this complaint³ by the Board of [the Silver Falls School District A final decision may be appealed to the Oregon Department of Education under OAR 581-002-0003 - 581-002-0005.]

³ The public charter school board is given this authority by the school's sponsor, [name of school sponsor], as established by [the charter agreement] [Board policy] [a resolution of the [name of school sponsor] board].

[Name of Public Charter School]

COMPLAINT FORM

To: Employee* [Administrator] [Director]* Board chair Board vice chair

* Form available but is not required.

Person Making Complaint _____

Phone Number _____ Email _____

Nature of Complaint _____

Who should we talk to and what evidence should we consider? _____

Suggested solution/resolution/outcome: _____

Signature of Complainant: _____ Date: _____

.....

Office Use

Disposition of Complaint: _____

Signature: _____ Date: _____

cc: School Office