



School Board Regular Meeting Agenda

April 14, 2026, 5:30 PM

Location:

Education Center, Board Room #314
520 NW Wall Street
Bend, OR 97703

1.	<u>Call to Order</u>	
	Speaker(s): Marcus LeGrand, Board Chair	
2.	<u>Pledge of Allegiance</u>	
	Speaker(s): Marcus LeGrand, Board Chair	
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B.	Above and Beyond the Call of Duty Award	
	Speaker(s): Dr. Lisa Birk, Acting Superintendent	
C.	Resolution 2012: Teacher Appreciation Week	7
	Speaker(s): Marcus LeGrand, Board Chair	
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5.	<u>Student Representation Report</u>	
	Speaker(s): Student Representatives	
6.	<u>Public Comment</u>	
	Speaker(s): Marcus LeGrand, Board Chair	
	Description: This is the time provided for individuals to address the Board. Public Comment requests are accepted in advance via Google Form until 5:00 p.m. on the day of the meeting for both in-person and virtual comment. Individuals may also sign up for public comment on the day of the meeting on a space available basis in alignment with Governance Process 6 (GP-6). In-person sign up will be accepted at the boardroom door until 5:35 p.m. on the day of the meeting.	
7.	<u>Consent Agenda</u>	
	Speaker(s): Marcus LeGrand, Board Chair	
	Description: Items that are routine in nature are placed on the Consent Agenda. Any item placed on the Consent Agenda may be removed at the request of any Board member prior to the time a vote is taken. All remaining items of the Consent Agenda are then disposed of in a single motion.	
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Speaker(s): Kinsey Martin, Executive Director of Policy, Advocacy, and Equity	

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Speaker(s): Dr. Lisa Birk, Acting Superintendent	
13. Director Comments	
Description: An opportunity for board members to provide comments or reflections.	
14. Adjourn	
Description: Meeting will be adjourned with next Regular School Board Meeting scheduled for May 12, 2026.	



School Board Regular Meeting Agenda

April 14, 2026, 5:30 PM

Location:

Education Center, Board Room #314
520 NW Wall Street
Bend, OR 97703

1. **Call to Order**

Speaker(s): Marcus LeGrand, Board Chair

2. **Pledge of Allegiance**

Speaker(s): Marcus LeGrand, Board Chair

3. **Review of Agenda**

Speaker(s): Marcus LeGrand, Board Chair

4. **District Recognitions**

A. Champion for Students Award

Speaker(s): Dr. Lisa Birk, Acting Superintendent

B. Above and Beyond the Call of Duty Award

Speaker(s): Dr. Lisa Birk, Acting Superintendent

C. Resolution 2012: Teacher Appreciation Week

Speaker(s): Marcus LeGrand, Board Chair

Attachments:

Resolution 2012: Teacher Appreciation Week

5. **Student Representation Report**

Speaker(s): Student Representatives

6. **Public Comment**

Speaker(s): Marcus LeGrand, Board Chair

Description: This is the time provided for individuals to address the Board. Public Comment requests are accepted in advance via Google Form until 5:00 p.m. on the day of the meeting for both in-person and virtual comment. Individuals may also sign up for public comment on the day of the meeting on a space available basis in alignment with Governance Process 6 (GP-6). In-person sign up will be accepted at the boardroom door until 5:35 p.m. on the day of the meeting.

7. **Consent Agenda**

Speaker(s): Marcus LeGrand, Board Chair

Description: Items that are routine in nature are placed on the Consent Agenda. Any item placed on the Consent Agenda may be removed at the request of any Board member prior to the time a vote is taken. All remaining items of the Consent Agenda are then disposed of in a single motion.

A. Approval of Minutes

Description: March 10, 2026, Regular Business Meeting, and March 31, 2026, Work session; *Reference: ORS 192.650 and ORS 332.057*

Attachments:

3.10.26 Minutes - Regular Meeting - DRAFT

3.31.26 Minutes - Work Session - DRAFT

B. Approval of Personnel Recommendations

Description: Administrative, Licensed, Classified, and Confidential Staff Recommended Hires, Resignations, and Retirements; *Reference: ORS 332.505*

Attachments:

Administrative and Licensed Recommended Hires, Resignations, and Retirees 4.14.26

Classified Recommended Hires, Classified & Confidential Resignations, and Classified Retirements 4.14.26

C. Secondary Math Curriculum Adoption

Attachments:

Executive Summary: Secondary Math Curriculum Adoption

8. **Consent for Information**

Speaker(s): Dr. Lisa Birk, Acting Superintendent

Description: Items that are routine in nature and for informational purposes only are placed on the Consent for Information.

A. Report: Executive Limitation 4.4: Facilities

Attachments:

Executive Summary: Executive Limitation 4.4: Facilities

B. 3rd Quarter Finance Report

Attachments:

Executive Summary: Third Quarter Financial Update for FY2025-26

Financial Statements April 2026

Investment Report April 2026

C. Follow-up to Comment Received

Attachments:

4.14.26 District Follow-up to BLS School Board Meeting Comment

4.14.26 District Follow-up to BLS School Members Comments and Questions following Budget Committee Training Work Session

9. **Reports**

A. Secondary Social Science Materials Review and Adoption

Speaker(s): Dean Richards, Director of Secondary Curriculum, Instruction and Systems

Attachments:

Executive Summary: Social Science Materials Review & Adoption

Presentation: Social Science Materials Review and Adoption

B. Standards Based Instruction and Grading

Speaker(s): Stephen DuVal, Executive Director of Middle Schools, and Katie Legace, Executive Director of High Schools

Attachments:

Executive Summary: Standards Based Instruction and Grading Update

Presentation: Standards Based Instruction and Grading Update

C. Policy Revision Update: Fundraising, Donations, and Public Gifts

Speaker(s): Kinsey Martin, Executive Director of Policy, Advocacy, and Equity

Attachments:

Executive Summary: Policy Revision Update - Fundraising, Donations, and Public Gifts

Presentation: Re-Imagining Fundraising and Donations Policies and Procedures

Fundraising Feedback
Listening Session Feedback

10. **Discussion**

A. Board Policies for Adoption

Speaker(s): Kinsey Martin, Executive Director of Policy, Advocacy, and Equity

Description: Board Policies, Governance Processes, and Executive Limitations that require School Board review.

Attachments:

Executive Summary: Board Policies for Adoption

KMC-BP: Community-Funded Programs and Activities - DRAFT 3.10.26

3.11.26-4.3.26 Public Feedback

B. Resolution 2013: Educational Technology

Speaker(s): Amy Tatom, Board Vice Chair

Attachments:

Resolution 2013: Educational Technology

11. **Action Items**

A. Action following Executive Session

Speaker(s): Marcus LeGrand, Board Chair

12. **Superintendent's Report**

Speaker(s): Dr. Lisa Birk, Acting Superintendent

13. **Director Comments**

Description: An opportunity for board members to provide comments or reflections.

14. **Adjourn**

Description: Meeting will be adjourned with next Regular School Board Meeting scheduled for May 12, 2026.



Administrative School District No. 1

Resolution No. 2012: Teacher Appreciation Week

WHEREAS, teachers shape our future by their commitment to students’ success; and

WHEREAS, teachers engage students from many backgrounds and experiences; and

WHEREAS, teachers spend countless hours preparing lessons, evaluating progress, counseling and coaching students, and performing community service; and

WHEREAS, the community recognizes and salutes our teachers for educating our children;

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors for Bend-La Pine Schools proclaims **May 4-8, 2026**, to be **TEACHER APPRECIATION WEEK**; and

BE IT FURTHER RESOLVED that the Board of Directors for Bend-La Pine Schools strongly encourages all members of our community to join in expressing appreciation to our teachers for their dedication and devotion to their work.

Moved by _____

Second by _____

Yes votes _____

No votes _____

Dated this 14th day of April 2026.

Chair

Vice Chair

Attest: _____
Board Secretary



School Board Regular Meeting Minutes

Meeting Location:

Education Center, Board Room #314
520 NW Wall Street
Bend, OR 97703

Meeting Date: March 10, 2026

Board Members

Kina Chadwick: Present
Cameron Fischer: Present
Marcus LeGrand: Present
Jenn Lynch: Present
Shirley Olson: Present
Amy Tatom: Present
Ross Tomlin: Present

1. Call to Order

Speaker(s): Marcus LeGrand, Board Chair

Discussion: The meeting was called to order by Chair Marcus LeGrand at 5:30 pm

2. Pledge of Allegiance

Speaker(s): Marcus LeGrand, Board Chair

Discussion: The Pledge of Allegiance was led by Chair Marcus LeGrand.

3. Review of Agenda

Speaker(s): Marcus LeGrand, Board Chair

Action(s): I move to add a discussion on Educational Technology. This motion, made by Amy Tatom and seconded by Cameron Fischer, Carried.

Voting Detail: Kina Chadwick: Yea, Cameron Fischer: Yea, Marcus LeGrand: Yea, Jenn Lynch: Yea, Shirley Olson: Yea, Amy Tatom: Yea, Ross Tomlin: Yea

Voting Summary: Yea: 7, Nay: 0

Attachments: 3.10.26 Agenda

Discussion: Chair LeGrand noted that the addition to the agenda would be added as agenda item 11.C.

4. District Recognitions

A. Champion for Students Award

Speaker(s): Dr. Lisa Birk, Deputy Superintendent

Discussion: Dr. Birk presented the Champion for Students award to Kelly Sproba, Learning Specialist at Lava Ridge Elementary, for her expertise, collaboration, and dedication to students. She anchors her team with both skill and heart, partnering seamlessly with colleagues to create inclusive, meaningful learning experiences tailored to each student's strengths and needs.

5. Student Representation Report

Speaker(s): Student Representatives

Discussion: Daisy Chavez and Kelsey Farrelll from Caldera High School and Anna Beaudry from Bend Senior High School shared that they recently met with Executive Director Stephen DuVal to discuss standards based

grading, where the district's transition is, and how it impacts various programs and courses such as IB and AP. They shared that they discussed how change can be scary for some and look forward to continuing to work with the district to provide a student perspective. It was noted that during the last Student Voice Council meeting, the individual focus groups provided updates on their work and shared that April 30th is the Life and Career Readiness night at Caldera High School.

6. Public Comment

Speaker(s): Marcus LeGrand, Board Chair

Description: This is the time provided for individuals to address the Board. Public Comment requests are accepted in advance via Google Form until 5:00 p.m. on the day of the meeting for both in-person and virtual comment. Individuals may also sign up for public comment on the day of the meeting on a space available basis in alignment with Governance Process 6 (GP-6). In-person sign up will be accepted at the boardroom door until 5:35 p.m. on the day of the meeting.

Discussion: A parent spoke regarding the district's AQI policies.

A student spoke about the opportunity for freshman to volunteer at Camp Tamarack.

A parent and current graduate student proposed the idea of an outdoor leadership feasibility survey for educators.

Several parents and community members spoke about technology in schools and AI use among students and encouraged the district to continue to work with families on these topics.

7. Consent Agenda

Speaker(s): Marcus LeGrand, Board Chair

Description: Items that are routine in nature are placed on the Consent Agenda. Any item placed on the Consent Agenda may be removed at the request of any Board member prior to the time a vote is taken. All remaining items of the Consent Agenda are then disposed of in a single motion.

Action(s): I move to approve the Consent Agenda. This motion, made by Amy Tatom and seconded by Ross Tomlin, Carried.

Voting Detail: Kina Chadwick: Yea, Cameron Fischer: Yea, Marcus LeGrand: Yea, Jenn Lynch: Yea, Shirley Olson: Yea, Amy Tatom: Yea, Ross Tomlin: Yea

Voting Summary: Yea: 7, Nay: 0

A. Approval of Minutes

Description: February 10, 2026, Regular Meeting; February 24, 2026, Special Meeting; and February 24, 2026, Work Session; *Reference: ORS 192.650 and ORS 332.057*

Attachments: 2.10.26 Minutes - Regular Meeting – DRAFT, 2.24.26 Minutes - Special Meeting – DRAFT, and 2.24.26 Minutes - Work Session – DRAFT

B. Approval of Personnel Recommendations

Description: Administrative, Licensed, Classified, and Confidential Staff Recommended Hires, Resignations, and Retirements; *Reference: ORS 332.505*

Attachments: Administrative and Licensed Recommended Hires, Resignations, and Retirees 3.10.26 and Classified Recommended Hires, Classified & Confidential Resignations, and Classified Retirements 3.10.26

C. Adoption of Board Policies

Attachments: Executive Summary: Board Policies for Adoption, AC-BP: Nondiscrimination - DRAFT 3.10.26, and CB-BP: Superintendent - DRAFT 3.10.26

D. Secondary Science (Chemistry) Curriculum Adoption

Attachments: Executive Summary: Secondary Science (Chemistry) Curriculum Adoption

8. Consent for Information

Speaker(s): Dr. Lisa Birk, Deputy Superintendent

Description: Items that are routine in nature and for informational purposes only are placed on the Consent for Information.

Discussion: Dr. Birk shared that in the Consent for Information there are three policies that the district is adopting. AC-AR: Discrimination Complaint Procedures has been updated to align with OSBA sample policy and ODE civil rights guidance, ECACA-AP: Radio Frequency Identification Device is a new district policy in alignment with current district practices and OSBA sample policy, and JGD-AP: Suspension has been updated to align the appeal process with district best practice.

Birk noted that the final document in the Consent for Information is follow up to public comment that was received at last month's board meeting.

A. Approval of Administrative Policies and Regulations

Attachments: Executive Summary: Administrative Policies and Regulations for Adoption, AC-AR: Discrimination Complaint Procedures - DRAFT 3.10.26, ECACA-AP: Radio Frequency Identification Device - DRAFT 3.10.26, and JGD-AP: Suspension - DRAFT 3.10.26

B. Follow-up to Comment Received

Attachments: 3.10.26 District Follow-up to BLS School Board Meeting Comment

9. Action Items

A. FY 2025-26 Supplemental Budget

Speaker(s): Dan Emerson, Chief Financial Officer

Action(s): I move to approve Resolution 2011, recognizing revenue and increasing Enterprise and Community Services appropriations by \$2,200 in the FY2025-26 Bend La Pine Schools Budget as presented. This motion, made by Amy Tatom and seconded by Shirley Olson, Carried.

Voting Detail: Kina Chadwick: Yea, Cameron Fischer: Yea, Marcus LeGrand: Yea, Jenn Lynch: Yea, Shirley Olson: Yea, Amy Tatom: Yea, Ross Tomlin: Yea

Voting Summary: Yea: 7, Nay: 0

Attachments: Executive Summary: FY2025-26 Budget Resolution 2011 and Resolution 2011: 2025-26 Supplemental Budget

B. Naming of New Choice Option High School

Speaker(s): Dr. Lisa Birk, Deputy Superintendent

Action(s): I move to approve the new choice high school be named Deschutes River High School. This motion, made by Amy Tatom and seconded by Ross Tomlin, Carried.

Voting Detail: Kina Chadwick: Yea, Cameron Fischer: Yea, Marcus LeGrand: Yea, Jenn Lynch: Yea, Shirley Olson: Yea, Amy Tatom: Yea, Ross Tomlin: Yea

Voting Summary: Yea: 7, Nay: 0

Attachments: Executive Summary: Naming of New Choice Option High School

Discussion: Dr. Birk summarized the information presented to the Board at the last meeting, noting that the committee tasked with this work started with 74 names that were narrowed down to the top three that are being presented for consideration. Several Board members shared that although not excited about the three names presented, they want to respect the process. Birk shared that the committee met on four different occasions to narrow down the names submitted for consideration. Lakisha Clark, Bend Tech Academy Principal; Zach Harju, Realms Assistant Principal; and Katie Legace, Executive Director of High Schools, joined to provide a review of the process that took place over the last few months prior to presenting to the Board at the last meeting. It was shared by all three that student voice was the strongest voice in the process.

10. Reports

A. Secondary Math Curriculum Adoption

Speaker(s): Dean Richards, Director of Secondary Curriculum, Instruction and Systems

Attachments: Executive Summary: Secondary Math Curriculum Adoption and Presentation: Secondary Math Curriculum Adoption

Discussion: Dean Richards, Director of Secondary Curriculum, Instruction and Systems, provided a review of the new state standards regarding math requirements at the secondary level. Linda Adams, Math TOSA, reviewed the core beliefs of the math curriculum adoption team. Aaron Johnson, BSHS Math Teacher, discussed the curriculum reviewed as part of the process and the benefits of those

selected and then discussed the professional learning plan for the adoption. Discussion ensued regarding how much of the curriculum is pen and paper based versus technology based.

B. Strategic Priorities Update

Speaker(s): Dr. Lisa Birk, Deputy Superintendent

Attachments: Executive Summary: Strategic Priorities Update and Presentation: Strategic Priorities and Budget Update

Discussion: Dr. Birk presented the strategic priorities update as the official kickoff of the annual budget process. She reviewed the historical biennial state school funding and the allocation details as well as the enrollment trends over the past several years. The four Board organizational goals were reviewed before discussing the financial factors that impact the general fund and the district's financial commitments, such as K-8 assessment implementation as a result of SB 141, standards based instruction and grading, life and career readiness, and MTSS implementation. Birk, shared the budget timeline for the 2026-27 budget approval process that will culminate with expected Board approval of the budget at the June 16th meeting. Discussion ensued regarding the various factors that impact the district's funding and budgeting processes.

11. Discussion

A. Board Policies in Review

Speaker(s): Kinsey Martin, Executive Director of Policy, Advocacy, and Equity

Description: Board Policies, Governance Processes, Executive Limitations, Board Ends, and Board Staff Linkages that require School Board review. Public feedback regarding the policies in review is accepted via Google Form.

Attachments: Executive Summary: Board Policies for Review and KMC-BP: Community-Funded Programs and Activities - DRAFT 3.10.26

Discussion: Kinsey Martin, Executive Director of Policy, Advocacy, and Equity, presented a new Board policy for the Board to consider. KMC-BP: Community-Funded Programs and Activities is a result of a two-year process of reviewing the district's fundraising and donation policies. Martin noted the policy aligns with OSBA sample policy and includes community engagement feedback. The policy will be out for additional public feedback before returning to the Board for final approval at the next board meeting.

B. Board Policies for Adoption

Speaker(s): Dr. Lisa Birk, Deputy Superintendent

Description: Executive Limitation Policies

Action(s): I move to adopt the Executive Limitation policies as presented. This motion, made by Ross Tomlin and seconded by Amy Tatom, Carried.

Voting Detail: Kina Chadwick: Yea, Cameron Fischer: Yea, Marcus LeGrand: Yea, Jenn Lynch: Yea, Shirley Olson: Yea, Amy Tatom: Yea, Ross Tomlin: Yea

Voting Summary: Yea: 7, Nay: 0

Attachments: Executive Summary: Executive Limitation Policies for Adoption, Executive Limitation 1.1: Strong Academic Foundation - DRAFT 3.10.26, Executive Limitation 2.1: Passion, Purpose, and Plan - DRAFT 3.10.26, Executive Limitation 3.1: Wellness, Inclusion, and Belonging - DRAFT 3.10.26, Executive Limitation 4.1: Legally Required Policies - DRAFT 3.10.26, Executive Limitation 4.2: Treatment of Employees - DRAFT 3.10.26, Executive Limitation 4.3: Financial Planning & Administration - DRAFT 3.10.26, Executive Limitation 4.4: Facilities - DRAFT 3.10.26, Executive Limitation 4.5: Student Transportation - DRAFT 3.10.26, Executive Limitation 4.6: Nutrition Services - DRAFT 3.10.26, Executive Limitation 4.7: Technology - DRAFT 3.10.26, Executive Limitation 4.8: Communications - DRAFT 3.10.26, and Executive Limitation 4.9: Safety - DRAFT 3.10.26

Discussion: Dr. Birk shared that during the October 28, 2025, and January 27, 2026, Work Sessions, the Board had the opportunity to review its Executive Limitation policies to ensure alignment with all aspects of the Board's role regarding governance responsibilities and general operating guidance as well as alignment with the Board Mission, Vision, and Organizational Goals. District staff compiled the notes from the two meetings and updated each of the Executive Limitations policies accordingly.

C. Educational Technology

Speaker(s): Amy Tatom, Board Vice Chair

Discussion: Board Vice Chair Amy Tatom led the discussion of the newly added agenda item, Educational Technology (Ed Tech), by sharing her concerns with the district's youngest learners being dependent on ed tech. She encouraged the Board to work on a resolution addressing the Board's values regarding the use of ed tech. Director Shirley Olson noted that district staff are actively reviewing ed tech use and encourages that work to continue. She also noted that she would support a resolution and is happy to work on writing the document. Director Cameron Fischer shared that she doesn't feel that the issue is being taken seriously enough and that the district is not doing enough; however, she also acknowledged that there needs to be a balance. Director Jenn Lynch asked that the district fully report on all aspects of Executive Limitation 4.7 before undertaking a new resolution and encouraged everyone to advocate at the state level for change regarding curriculum. Director Ross Tomlin agreed that the Board needs more information and that the Board needs to continue to work with district staff on these issues. Various Board members shared their disappointment with the Stakeholder Engagement group and the fact that members of the group are not feeling heard and don't have a clear sense of direction for the group. Kinsey Martin, Executive Director of Policy, Advocacy, and Equity, shared that the district is currently reviewing a large batch of IT policies which include acceptable use of technology. Vice Chair Tatom and Director Olson agreed that they would work together to draft a resolution to bring back to the Board for review.

12. Superintendent's Report

Speaker(s): Dr. Lisa Birk, Deputy Superintendent

Discussion: Dr. Birk shared that the district is in agreement with many of the comments made regarding educational technology and acknowledged that transparency and communication could be improved in that area as the district team is working tirelessly considering all aspects of ed tech. Birk praised the community and district work being done to review the fundraising and donation practices and policies. She reminded the Board that the budget is a real concern for the district right now and highlighted some of the bills passed during the recent legislative short session, noting that some that didn't pass may come back to the forefront. Birk noted that Asian Family Night is coming up soon, as well as many other family engagement opportunities. She also celebrated the implementation of Final Forms for athletics and shared that feedback has been positive.

13. Director Comments

Description: An opportunity for board members to provide comments or reflections.

Discussion: Director Jenn Lynch recently attended a robotics competition in Salem and shared that it is an amazing opportunity for students and encourages everyone to get involved. She also appreciated the district's support of the program.

Director Ross Tomlin visited the careers class at La Pine High School this morning.

Director Kina Chadwick thanked the Student Voice Council for attending the meeting, appreciated Chair LeGrand for elevating black voice during Black History Month and thanked the community for pushing the district to do better.

Vice Chair Amy Tatom shared that March is Music in Schools Month and appreciated the joy music has brought to her son and family recently.

Chair Marcus LeGrand shared that he supported eight events last month for Black History Month and thanked Amy for stepping up in his absence. He also shared that this month is Women's Heritage Month.

14. Adjourn

Description: Meeting will be adjourned with next Regular School Board Meeting scheduled for April 14, 2026.

Discussion: Chair Marcus LeGrand adjourned the meeting at 8:17 pm.



School Board Work Session Meeting Minutes

Meeting Location:

Education Center, Board Room #314
520 NW Wall Street
Bend, OR 97703

Meeting Date: March 31, 2026

Board Members

Kina Chadwick: Absent
Cameron Fischer: Present
Marcus LeGrand: Present
Jenn Lynch: Present
Shirley Olson: Present
Amy Tatom: Present
Ross Tomlin: Present

Director Cameron Fischer joined the meeting at 5:34 pm. Director Jenn Lynch left the meeting at 6:31 pm.

1. Call to Order

Speaker(s): Marcus LeGrand, Board Chair

Discussion: The meeting was called to order by Chair Marcus LeGrand at 5:32 pm.

2. Pledge of Allegiance

Speaker(s): Marcus LeGrand, Board Chair

Discussion: The Pledge of Allegiance was led by Chair Marcus LeGrand.

3. Review of Agenda

Speaker(s): Marcus LeGrand, Board Chair

Discussion: There were no changes to the agenda.

4. Work Session

Description: The Board will focus on key Board work and initiatives.

A. Review of Superintendent Evaluation Policy and Procedures

Description: Evaluate and create a thoughtful approach to all aspects of the Board's role: governance responsibilities, general operating guidance, Board Ends/Goals, Superintendent evaluation, and Superintendent contract.

Discussion: Acting Superintendent Dr. Birk introduced Mary Paulson noting she would be serving as Acting Chief of Staff during Superintendent Cook's medical leave. It was noted that Paulson would be assisting in leading the conversation regarding the superintendent evaluation policy and process and has many years of experience with this work.

Paulson noted that the current policy is structured around the Carver Model, which the Board has adopted as its process. Board members reviewed the current policy and evaluation tool and provided feedback on what they appreciate and what they would like to see in the process moving forward.

It was noted that Birk, Paulson, and Board Clerk Bojanowski would take the notes from the Work Session

and prepare a draft policy, evaluation tool, and process timelines for the Board to review at the April Work Session.

5. **Adjourn**

Description: Meeting will be adjourned with next Regular School Board Business Meeting scheduled for April 14, 2026.

Discussion: Board Chair Marcus LeGrand adjourned the meeting at 6:33 pm.

Recorded by: Janet Bojanowski, Board Clerk

DRAFT: Pending Board Approval



HUMAN RESOURCES

Education Center

520 N.W. Wall Street

Bend, Oregon 97703-2699

(541) 355-1100

Fax: (541) 355-1109

DATE: April 14, 2026
 TO: Dr. Lisa Birk, Acting Superintendent
 Board of Directors for Bend-La Pine Schools

FROM: Susan Rodriguez, Interim Chief Human Resources Officer

RE: Administrative and Licensed Recommended Hires, Resignations, and Retirees

The Human Resource Department recommends approval of the following hires, resignations and retirees at the school board meeting on April 14, 2026. All Hires are subject to successful drug testing, background check, and Oregon licensure.

CERTIFIED HIRES

NAME	POSITION	LOCATION	STATUS	HIRE DATE
Cox, Kaci	School Counselor	Bend Senior High School	Temp Full-Time	04/02/2026
Freel, Megan	Social Studies Teacher	Summit High School	Temp Full-Time	04/02/2026
Hopwood, Maya	Language Arts Teacher	Caldera High School	Temp Full-Time	03/12/2026
Swenson, Erin	Preliminary Teacher	North Star Elementary School	Temp Full-Time	04/02/2026
Waller, Ariaah	Preliminary Teacher	Lava Ridge Elementary School	Temp Full-Time	04/02/2026

CERTIFIED RESIGNATIONS

NAME	POSITION	LOCATION	HIRE/RESIGNED DATES
Brown, Frank	Language Arts Teacher	Lava Ridge Elementary Schol	08/25/2014 – 06/30/2026
Buchanan, Scott	NJROTC	Mountain View High School	08/29/2022 – 06/30/2026
Easton, Rebecca	Language Specialist	Ensworth Elementary School	08/28/2006 – 06/30/2026
Gnos, Catherine	Speech Therapist	Special Programs	08/28/2000 – 06/30/2026
Jackson, Ben	Learning Specialist	La Pine Middle School	12/06/2021 – 06/30/2026
Kimerling Samuel	Family Consumer Studies Teacher	Mountain View High School	08/31/2015 – 06/30/2026
Kraybill, Carey	Alternative Education Teacher	Pacific Crest Middle School	08/25/2014 – 06/30/2026
LaTorre, Michael	Music Teacher	Pilot Butte Middle School	08/25/2014 – 06/30/2026
Lyon, Lindsay	Spanish Teacher	Summit High School	08/21/2025 – 06/30/2026
Mierjeski, Katherine	ESL Teacher	RE Jewell Elementary School	08/26/2013 – 06/30/2026
Opsal, Constance	Intermediate Teacher	La Pine Elementary School	08/29/2022 – 06/30/2026
Roe, Charlotte	Intermediate Teacher	Silver Rail Elementary School	09/02/2015 – 06/30/2026
Sanderson, Robin	Primary Teacher	Lava Ridge Elementary School	08/27/2007 – 06/30/2026
Wenndorf, Jeanette	Intermediate Teacher	Sky View Middle School	08/27/2018 – 06/30/2026



HUMAN RESOURCES

Education Center

520 N.W. Wall Street

Bend, Oregon 97703-2699

(541) 355-1100

Fax: (541) 355-1109

CERTIFIED RETIRE/REHIRE

NAME	POSITION	LOCATION	REHIRED/END DATES

ADMINISTRATIVE HIRES

NAME	POSITION	LOCATION	STATUS	HIRE DATE

ADMINISTRATIVE RESIGNATIONS

NAME	POSITION	LOCATION	HIRE/RESIGNED DATES
Surgeon, Tracie	Assistant Director of Nutrition Services	Nutrition Services	05/09/2008 - 03/27/2026

ADMINISTRATIVE RETIRE/REHIRE

NAME	POSITION	LOCATION	REHIRED/END DATES



HUMAN RESOURCES

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April 7, 2026

TO: Dr. Lisa Birk, Acting Superintendent
Bend-La Pine School Board of Directors

FROM: Susan Rodriguez, Interim Chief Human Resources Officer

RE: Classified Recommended Hires, Classified & Confidential Resignations, and Classified Retirements

The Human Resources Department recommends approval of the following hires, resignations, and retirements at the School Board meeting on April 14, 2026.

Classified Hiring

Name	Position/Posting No.	Location	Temp/Regular Position	Hire Date
Blair, George	Custodial Assistant II	Caldera	Reg 8.0 hrs / day	04/07/26
Cox, Jeni	EA Inclusion	Student Services	Reg 7.0 hrs / day	04/02/26
James, Craig	EA Inclusion	Three Rivers	Temp 6.5 hrs / day	04/23/26
Jenson, Tracy	Curriculum Secretary II	Caldera	Reg 8.0 hrs / day	04/02/26
Kincaid, Kara	EA Inclusion	Pacific Crest	Temp 7.0 hrs / day	04/02/26
McNair, Janae	Attendance Secretary II	Cascade	Reg 7.5 hrs / day	03/12/26
Miller, Kurt	Bus Driver	Transportation	Reg 5.0 hrs / day	03/02/26
Salidas, Sandra	Counseling Secretary II	BTA	Temp 8.0 hrs / day	04/02/26
Schmid, Kalea	EA Inclusion	Ensworth	Reg 6.5 hrs / day	04/02/26
Theotokatos, Sophia	Custodial Assistant II	Bend High	Reg 8.0 hrs / day	03/09/26
Trejo, Genelle	EA Inclusion	Caldera	Reg 7.0 hrs / day	03/12/26
Whitson, John	Custodial Crew I	Amity	Reg 8.0 hrs / day	04/10/26
Wood, Larry	Head Custodian III	Westside Village	Reg 8.0 hrs / day	03/13/26



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Classified Resignations

Name	Position	Location	Resign Date
Alcorn, Nicole	EA Inclusion	Pine Ridge	10/11/21 – 03/31/26
Barkus, Zackery	Bus Driver	Transportation	02/20/24 – 04/10/26
Benavidez, Raquel	Custodial Crew I	Amity Creek	10/31/22 – 04/10/26
Farenbaugh, Kayla	Bus Monitor	La Pine Transportation	09/11/25 – 04/10/26
Haag, Emily	EA Inclusion	High Lakes	08/31/22 – 06/11/26
Herrera, Zaira	EA Instruction	Pilot Butte	02/12/26 – 03/31/26
Holwerda, Dashiell	EA Inclusion	Realms Middle	09/07/22 – 06/11/26
King, David	Bus Driver	Transportation	09/02/20 – 03/20/26
Loukonen, Jessica	Consulting Registered Nurse	Student Services	02/03/25 – 06/12/26
Mathews, James	Custodial Crew I	Bear Creek	09/04/18 – 04/06/26
McCoy, Renee	Bus Driver	Transportation	05/01/24 – 06/11/26
Miller, Sol	Nutrition Server I	Pine Ridge	12/12/25 – 06/05/26
Moore, Anita	School to Work Program Mgr.	Bend High	08/28/17 – 06/16/26
Nelson, Victoria	Nutrition Server I	Pilot Butte	09/26/25 – 03/17/26
Palmer, Evan	EA Inclusion	Rosland	05/15/25 – 04/24/26
Zambrana, Marlon	Custodial Crew I	Westside Village	10/16/24 – 04/10/26



HUMAN RESOURCES

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Classified Retirements

Name	Position	Location	Retire Date

Classified Retire-Rehires

Name	Position	Location	Rehire Date
Blackwell, Meredith	Office Manager II	WE Miller	06/01/26 – 06/30/26

Classified Dismissals

Name	Position	Location	Term Date
Gerlicher, Martha	Bus Driver	Transportation	07/15/22 – 04/07/26

Confidential Hiring

Name	Position/Posting No.	Location	Temp/Regular Position	Hire Date

Confidential Resignations

Name	Position	Location	Resign Date

Confidential Dismissals

Name	Position	Location	Term Date



REPORT: Secondary Math Curriculum Adoption

PRESENTED BY: Dean Richards, Director of Secondary Curriculum, Instruction, and Systems

EXECUTIVE SUMMARY:

This executive summary is to share the findings secondary Math teachers who are teaching our “+1” courses, traditionally taken by juniors and seniors.

Instructional Material Review Process:

Findings for Math 3:

We recommend Big Ideas as our Math 3 curriculum. This curriculum is well aligned with ODE standards and district targets. Its scope and sequence effectively prepare students for the functions they will encounter and need to master in Pre-Calculus or equivalent math courses. In addition, the curriculum’s strong emphasis on transformational graphing equips students to better understand and adapt to new functions and concepts they will encounter in future AP or IB classes.

Big Ideas offers a robust selection of digital resources, including scaffolding exercises, Spanish-language materials, editable assessments, and performance tasks, all of which support equitable access to learning for all students. The textbook is also easy for students, parents, and support staff to navigate, with clear examples that are explicitly connected to problem sets. Finally, the instructional style and expectations embedded in the curriculum closely mirror those found in most college-level courses and both the Advanced Placement and International Baccalaureate programs, helping students build readiness for both postsecondary instruction and testing required by AP & IB.

Key Findings for Explorations in Data Science:

CourseKata ABC was the early recommendation for this course as it was rolled out by the state. ODE has continued to develop curriculum for this course and now has more curriculum in development. As demand for this course grows and matures over time, we will continue to provide curricular supports for our teachers.

Key Findings for Applied Mathematics:

Mathematics for the Trades and Electrical Math Principles and Applications has been the preferred text for this course for several years. It develops the mathematical knowledge for those who plan to work in Career and Technical Education courses including forestry and construction.

Key Findings for Math in Society:

Math in Society is a Text recommended by our community college partners on this course. This open-source text allows students to explore the variety of ways that mathematics shows up in our world, including business, statistics, and functions. Content may be extended to include mathematics in music, art and computer science.

Note: We do not have adopted materials for AP and IB courses. These courses require specialized training that occur outside of Bend La Pine. Teachers who attend AP and IB trainings are given options of texts for instruction. We allow teachers to use AP and IB approved text for the courses that they teach. At times, this means that teachers use different AP text for the same course at different schools. However, the AP experience is maintained through instruction and assessment.

ADMINISTRATIVE RECOMMENDATION:

The district recommends approving the adoption of Big Ideas, CourseKata, Mathematics for the Trades, Electrical Math Principles and Applications, and Math in Society.

RECOMMENDED MOTION:

I move to approve the secondary math curriculum as presented.



REPORT: Executive Limitation 4.4: Facilities

PRESENTED BY: Doug Pigman, Executive Director of Facilities

EXECUTIVE SUMMARY:

This monitoring report provides the Board with information to evaluate the Superintendent's compliance with the directives of Executive Limitation 4.4: Facilities.

Monitoring Report

The Superintendent shall not fail to assure that the district's physical facilities support the accomplishment of the Organizational Goals and policies.

Accordingly, the Superintendent shall not fail to:

1. Take reasonable steps to ensure that District facilities are clean, safe, inclusive, and not subject to improper wear and tear or insufficient maintenance.
2. Ensure a Sustainability Plan is developed, reviewed, and revised every five years or more.
3. Refresh the District's 20-year long-range Facilities Plan every five years to address student capacity, site-specific instructional needs, operational and maintenance needs, changing technology, and safety enhancements, and the Sustainability Plan.
4. Obtain approval from the Board of Directors to build or substantially renovate District facilities. For new facilities programming, the Superintendent shall not fail to ensure the programming and construction teams:
 - a. Invite Board member participation for any project which requires architectural services.
 - b. Get approval from the Board of Directors for change orders which alter the scope and purpose of the planned project (i.e., add or subtract from planned square footage or are in excess of \$300,000). The Superintendent shall inform the Board of Directors of any change orders which exceed \$100,000 but are less than \$300,000.
 - c. Regularly update the Board of Directors on construction progress.
 - d. Plan all projects in alignment with ODE guidelines.

Notable Evidence for 2025-2026:

- **Maintenance Department**
 - Providing professional development in building systems, safety compliance, and modern maintenance technologies.
- **Facilities Development**
 - Utilize the districtwide facilities condition assessment from ODE to identify critical repairs and infrastructure priorities during the sites and facilities process.
- **Custodial Department**
 - Develop and implement a District Cleaning Standards Manual to ensure consistency, accountability, and excellence across all facilities.
- **Sustainability**
 - Updated the Sustainability Job description in preparation for posting the position to the public.
 - Performed a statewide roles and responsibilities analysis including wage evaluation
 - Received a good response to the posting many of which were qualified individuals.
 - All interviews have been conducted, and an offer has been sent to the proposed candidate.



Business Office
520 NW Wall Street
Bend, OR 97703

April 14, 2026

To: Bend La-Pine School Board and Dr. Lisa Birk, Acting Superintendent

From: Nick Shein, Acting Executive Director Finance

RE: Third Quarter Financial Update for FY2025-26

Dr. Birk,

This is the third quarter financial update for FY 25-26. The financial information presented is based on actual data through March 31, 2026, with projections through the end of the FY 25-26.

Estimates of the District's total general fund revenues have increased by \$1.72M since the second quarter financial report, however we are still under budget on total resources by approximately \$220,000. The primary drivers of the additional revenue are from a reconciliation of our investment earnings and increased billing to Medicaid.

In the third quarter our major expenditure trends remained stable. We are still forecasting total personnel expenditures to be nearly \$191M, which is \$4M below the appropriated adjusted budget. Despite our best efforts, we have open positions that are currently unfilled. Those vacancies are the primary driver of personnel savings. Other operating costs are forecast at \$42.8M, which is \$1.1M more than budget due to additional facilities and technology costs. When combined as a whole, total expenditures are \$3.0M under budget. Should these savings come to fruition, they will be valuable in offsetting the projected long-term forecast trend which shows expenditures quickly outpacing revenues.

Based on the known impacts to our budget, we project the FY 25-26 ending fund balance to be \$22M. This is a reduction of \$6.35M from the current FY 25-26 actual beginning fund balance, indicating that revenues are no longer covering the costs of core services, and necessitating the utilization of reserves to balance the budget.

Also included in your financial statement package, you will find a report on Investment of proceeds. Our policy allows for investment of cash balances to achieve greater earnings on our cash. Large tax revenue payments came in November, pushing our cash balance in the Local Government Investment Pool (LGIP) over the pool limit. This is completely normal and occurs every year due to the influx of tax receipts. To rectify our cash balance in the LGIP, we moved the operational cash to short term treasury bill investments, with maturities timed to meet our operational cash needs throughout the remainder of FY25-26. The current market value of our operations portfolio is \$19.9M, and the remaining maturity dates are in April and May of 2026. We also have longer term investments of the 2025 Bond issuance. Maturities of these investments are scheduled to align with our spending needs, and the total market value of our capital portfolio is \$143M.

Sincerely,
Nick Shein

Bend-La Pine Schools
Statement of Revenues and Expenditures
For the Period Ended June 30, 2026 with Year-End Projections
General Fund - Operations Sub-fund
FY 2025-26

	Adjusted Budget	April 2026	Budget Variance
Resources:			
<u>Beginning fund balance</u>	<u>28,274,271</u>	<u>28,339,646</u>	<u>65,375</u>
Revenue			
Formula revenue:			
Tax revenue	114,171,157	114,076,428	(94,729)
State school fund	101,266,687	100,171,053	(1,095,634)
Common school fund	2,385,000	2,419,668	34,668
County school fund	250,000	298,395	48,395
<u>Total formula revenue</u>	<u>218,072,844</u>	<u>216,965,544</u>	<u>(1,107,300)</u>
Earnings on investments	1,500,000	2,776,922	1,276,922
Local sources - other	3,010,000	2,175,457	(834,543)
Intermediate sources	3,548,102	3,606,618	58,516
State non-formula resources	-	-	-
Federal non-formula resources	610,000	1,098,691	488,691
Transfer in	682,111	511,350	(170,761)
<u>Total revenues</u>	<u>227,423,057</u>	<u>227,134,582</u>	<u>(288,475)</u>
<u>Total resources</u>	<u>255,697,328</u>	<u>255,474,228</u>	<u>(223,100)</u>
Expenditures:			
Salaries, payroll costs and benefits:			
Certified	69,793,482	71,700,858	(1,907,376)
Classified	33,436,786	31,835,394	1,601,392
Administrators and supervisors	15,548,824	15,594,025	(45,201)
All other salaries	4,512,577	4,380,073	132,504
<u>Total salaries</u>	<u>123,291,669</u>	<u>123,510,350</u>	<u>(218,681)</u>
<u>Payroll cost and benefits</u>	<u>71,562,837</u>	<u>67,165,363</u>	<u>4,397,474</u>
<u>Total salaries, payroll costs and benefits</u>	<u>194,854,506</u>	<u>190,675,713</u>	<u>4,178,793</u>
Other operating costs			
Utilities and purchased services	22,424,889	21,741,780	683,109
Supplies, texts, tools	8,067,339	7,180,352	886,987
Equipment	292,500	123,100	169,400
Dues, fees and liability insurance	2,380,394	2,867,271	(486,877)
Debt service	456,846	1,345,134	(888,288)
Transfer out	8,041,556	9,551,927	(1,510,371)
<u>Total other operating costs</u>	<u>41,663,524</u>	<u>42,809,564</u>	<u>(1,146,040)</u>
<u>Total expenditures</u>	<u>236,518,030</u>	<u>233,485,277</u>	<u>3,032,753</u>
<u>Excess of revenues over expenditures</u>	<u>19,179,298</u>	<u>21,988,951</u>	<u>2,809,653</u>
<u>Fund balance, ending</u>	<u>19,179,298</u>	<u>21,988,951</u>	<u>2,809,653</u>
As budgeted			
Contingency	500,000	500,000	
<u>Fund balance</u>	<u>18,679,108</u>	<u>21,488,951</u>	
<u>Fund balance, ending</u>	<u>19,179,108</u>	<u>21,988,951</u>	
Fund Balance as a percent of resources			
Contingency	0.2%	0.2%	
Fund Balance	7.3%	8.4%	
Total reserve	7.5%	8.6%	

Investment of Proceeds

April 1, 2026

Distribution by Maturity

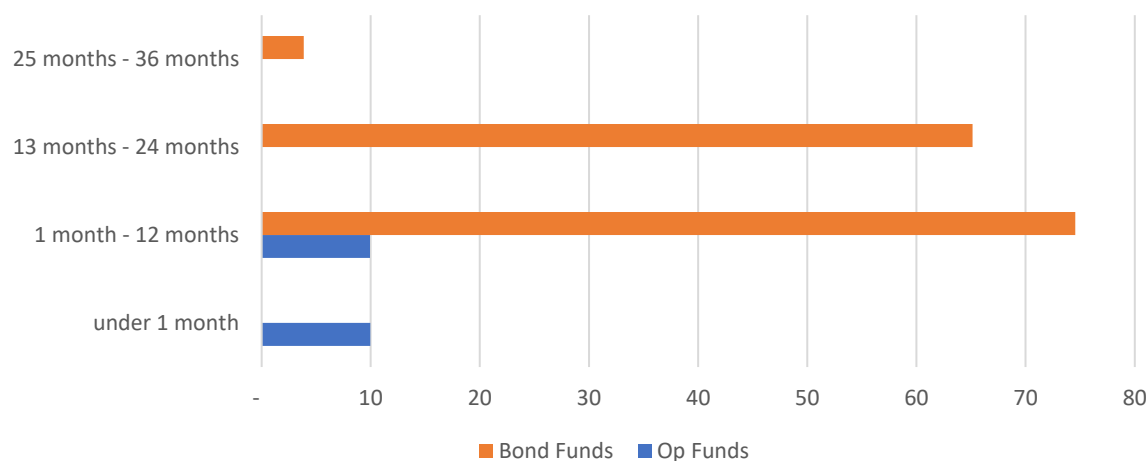
Operating Funds:

Maturity	Number	Market Value	Percent of Holdings	Average Yield to Maturity
Under 1 month	1	9,969,792	50%	3.76%
1 month - 12 months	1	9,941,597	50%	3.67%
Total	2	19,911,389	100%	3.72%

2025 Bond Funds:

Maturity	Number	Market Value	Percent of Holdings	Average Yield to Maturity
Under 1 month	-	-	0%	0.00%
1 month - 12 months	4	74,558,184	52%	3.68%
13 months - 24 months	4	65,149,886	45%	3.85%
25 months - 36 months	2	3,862,826	3%	3.82%
Total	10	143,570,896	100%	3.78%

Distribution By Maturity (Millions)



Distribution by S&P Rating

S&P Rating	Number	Market Value	Average Yield to Maturity
AA+u	12	163,482,285	3.76%

Distribution by Moody's Rating

Moody Rating	Number	Market Value	Average Yield to Maturity
Aaa	12	163,482,285	3.76%

Issuer	Market Value	% Assets	Yield
United States Treasuries	19,911,389	12.2%	3.72%
United States Treasuries Discount Notes	-	0.0%	0.0%
<u>United States Treasuries Notes</u>	<u>143,570,896</u>	<u>87.8%</u>	<u>3.78%</u>
Total	163,482,285		



District Follow-up to Comment Received at March 10, 2026, Board Meeting

Agenda Item/Topic:	District Staff Assigned to:	Notes/Comments:
Public Comment: AQI Updates from OHA	Paul Dean, Chief Operations Officer	<p>Bend-La Pine Schools has been in communication with Representative Emerson Levy to better understand the status of any potential changes. At this time, OHA has indicated a change may be coming, but no formal guidance has been issued.</p> <p>Our position remains consistent, we will follow Oregon Health Authority guidance.</p> <p>We have also emphasized the importance of including school districts in these discussions, as changes to AQI thresholds directly impact daily school operations and student experiences.</p> <p>We were aware of the EPA PurpleAir program; however, DEQ informed us last summer that it was being discontinued, and the devices did not meet our IT security standards. Instead, we partnered with DEQ to identify approved monitors and have piloted one at a school. We will continue monitoring gaps in AQI coverage to ensure reliable local data.</p>
Public Comment: Camp Tamarack Volunteer Options for 9th Graders	Katie Legace, Executive Director of High Schools	<p>Our high school principals have actively advocated to recruit 10th-12th graders to serve as Camp Counselors at Tamarack. Our principals want to ensure that 9th graders have a positive start to their HS tenure and attendance is a key indicator of success. The first camp session in the fall is soon after school starts and our principals are concerned about our newest HS students missing several days at the beginning of their ninth grade year.</p>
Public Comment: Technology Use in the Classroom	Lisa Birk, Acting Superintendent	<p>The district continues to review its technology-related policies and practices. These will be reported on during the May report for EL 4.7</p>



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
Questions from Board members following Budget Committee Training Work Session on February 24th	
<p>Please provide the costs of “de-teching” curriculum.</p>	<p>In secondary, if we were to purchase a text book for each student the cost would be in the hundreds of thousands. We currently purchase a class set for the class room and digital copies for students to access at home. Each physical textbook is between \$100 and \$150. In high school, we have required texts in Math 3, MWH, USH, and Chemistry. This is for the required sequenced courses for graduation. Other courses also have text requirements. There are about 1200 students per class. If we were only to assume that students needed 3 texts per year, the cost at the HS level would be over 2 million dollars.</p> <p>In elementary, most of our curriculum is provided to students the form of workbooks and paper/pencil methods. The supplemental pieces to curriculum that are provided in digital format are generally for independent practice, assessment, and intervention. These would not be able to be “de-teched” from a curriculum standpoint, but the functions are required and would necessitate the purchase of alternative programs and a considerable amount of staff time to create and implement.</p>
<p>What improvements if any need to be made and/or will be made at Buckingham Elementary with the relocation of Realms Middle School.</p>	<p>With the relocation of Realms Middle School to the Buckingham campus, a limited number of operational adjustments are being made to support the shared use of the facility while maintaining clear separation between the elementary and middle school programs.</p> <p>The primary items include:</p> <ul style="list-style-type: none"> ● Area separation: Work is underway to create some separation between the elementary and middle school sections of the building to ensure each program has its own defined space. ● Minor restroom modifications: Some small adjustments are being made to restroom facilities to better support middle school use. ● Temporary storage solutions: Temporary storage is being provided to support program needs during the transition. ● Identification signage: Signage will be installed to identify REALMS middle school



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
<p>Please provide the vendor list for object code 0311 (Instructional Services).</p>	<p>COIC CURRICULUM ASSOCIATES LLC CENTRAL OREGON COMMUNITY COLLEGE J BAR J Youth Services SISTERS SCHOOL DISTRICT #6 AVID CENTER COCC K12 MANAGEMENT INC</p> <p>This is primarily for the Alternative Learning Options and the classes that are offered through Bend-La Pine Online (K-12 Management).</p>
Questions from Board members in response to emails received from constituents	
<p>RE: Elementary students taking I pads to the library to check out digital books - Can you please provide us an update as to why this is? Where this practice came from? What percentage of books in all school libraries (not just elementary) are digital vs printed. Are we in the process of shifting away from printed materials to all digital, and if so, why? What is the evidence being used that reading on digital devices improves outcomes and does not increase the risk of health issues associated with excessive screen use?</p>	<p>For this school, the purpose of the students bringing their iPads to the library is to access Destiny, the library catalogue and check out system which resides on the iPad. At the particular school in question, students use the first few minutes to see if they have books to return or renew and to search for books they like, including print, ebooks, and audio books. The intent is not to check out more digital books, but to find books in the library that they want to read and check out.</p> <p>Data provided by the media technician at the library in the particular school in question has shown an increase in printed books checked out and a decrease in digital books checked out since the implementation of this particular manner of checking out books was implemented. This information was shared with the parents who expressed concern.</p> <p>We are not shifting away from printed materials to digital. There is no intention to do so and our libraries and classroom book collections are an essential and vibrant part of our school communities. Standards are set for the state of Oregon in areas related to use of digital search tools and locating information across digital platforms which we must adhere to as well.</p> <p>In our district, students use both iPads as well printed books/materials during their instructional day.</p>



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
<p>Please report to the board the instructions given to staff about appropriate vs. inappropriate use of the iPads during the school day.</p>	<p>ELEMENTARY: This document is provided to Elementary Principals to share with staff. We also have a Commitments to Learning document that details the Dreambox and Lexia expectations for use.</p> <p>SECONDARY: This has been done informally; however, it is an area that we can improve and be more specific about use. Moving into next year, staff will receive expectations and training around use of JAMF specifically and the requirements surrounding use.</p>
<p>Share any feedback or data you've received from staff on whether the current monitoring & enforcement system for the iPads is adequate in their opinion to maintain an effective instructional environment.</p>	<p>ELEMENTARY: We have not received much feedback from staff about concern for iPad usage (or misuse). We are preparing to have two focus groups with K-2 teachers and 3-5 teachers so we can learn more about how they are using the iPads and any concerns they have for management of student behavior. We are also surveying administrators to determine if they have concerns regarding usage or misuse of iPads at their school. At this time, use of iPads for non-instructional reasons is not a common practice at the elementary level.</p> <p>SECONDARY: iPad misuse is not the main reason for discipline referral as was commented in a recent meeting. For nearly every school, misuse was not in the top 5 reasons for behavior response.</p>



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
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Questions from Board Members in response to the "Tech Letter" Response from the district:	
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<p>When using Ipads for research in the classroom – how does that work with JAMF? How can we ensure students are doing academic work, not playing games, without placing the burden on the teacher?</p>	<p>Teachers utilizing Jamf Teachers build "courses" for each of their preps. They can build these one time and reuse them all year, or alter them if they want to include other resources for research or special projects. Each course contains the apps that they want students to use while in their class. Once Jamf Teacher is engaged, all other apps are unavailable (disappear) to the student except for those chosen specifically by the teacher.</p> <p>The Bend-La Pine School District uses Jamf Pro, a mobile device management system. The classroom management feature within Jamf Pro is called Jamf Teacher.</p> <p>This tool allows teachers to create templates for managing devices when students are in their room. This may include allowing only specific apps, websites, and iPad features while restricting others. The restrictions are created and set by the teacher and may be different from class to class based on the digital tools needed during the period.</p> <p>Teachers K-12 may also choose to use Apple Classroom to monitor screens while students are in close proximity. While Jamf Teacher is managed by the teacher, BLS also operates systems at the district level, including web filtering and curated sets of evaluated educational apps, so the responsibility for iPad management is shared.</p>
<p>States we block generative AI – how does that work when its embedded in google, etc? What generative AI tools are blocked?</p>	<p>Our Palo Alto firewall blocks artificial intelligence tools by category. This means websites and services identified as AI platforms are automatically restricted based on our security and instructional policies. Additionally, we have customized a solution to block the "AI Mode" that is presented in a google search. Unfortunately, this does not conceal the "AI overview" that is generated from a Google search.</p> <p>Please review this FAQ document we created regarding AI questions sent to us by Well-Wired. This should answer questions related to how we are using generative AI (rather than agentic, adaptive, or predictive AI) and how we are blocking it. We have a draft of a website for parents and community members that answers AI questions as well and expect that to be published when the district completes the new website process.</p>

District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
<p>In regards to Magic school – I was told a very specific example by a family of it being used in an elementary classroom where teacher had students use it to “brainstorm nicknames.” This seems like it should be a human-driven creative activity, and I’m unclear why we would use a chatbot for something like this in an elementary classroom. What is the expressed educational purpose for which this is being used in elementary classrooms – how has proper use been communicated to elementary teachers? Do you consider that proper use?</p>	<p>The degree to which a tool is used and is appropriate has to do with the previous instruction, future goals, and group considerations that the teacher has made about the lesson. Without this knowledge, this is difficult to answer.</p> <p>This tool may be used beginning in grade 3. Teachers could choose to use a tool like this as a learning chatbot or as a specific topical chatbot to engage in subject-specific inquiry. Each situation would be driven by goals outlined by the teacher.</p>
<p>The section about “students must affirm their understanding prior to first use of the tool” – What training have our students had to “affirm their understanding”, particularly elementary students?</p>	<p>Teachers would be teaching this information prior to assigning a task that used a chatbot. Teachers have access to several instructional resources for teaching this content. The agreement is written at grade-level language for the students and they must read and accept the guideline understanding prior to engaging in use. This is part of the assignment.</p>
<p>Letter states we are able to review student generated AI content – does someone actually review this? And if so, how much is academic vs nonacademic?</p>	<p>Teachers can see all the generations created by students. There are only “academic tools” in the system. If a student attempts to use a tool for non-academic purposes (e.g., asking for personal advice or researching a topic that is not related to the assignment), the tool will not respond and will redirect the student to the academic purpose of the tool. We would be happy to show you the analytics a teacher may receive for a student. Just reach out to Karen Rush and we can arrange a demonstration.</p>



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
<p>“Students cannot independently access district AI tools without teacher created environments.” Does this mean ? Can students not open Magic School on Ipads without the teacher allowing each access?</p>	<p>Correct. Students cannot access any tools in MagicSchool unless the teacher creates a room, adds the tool to the room, and provides joining information to the student. Teachers can open, pause, or lock tools at any time.</p>
<p>Did the 90 minute AI training differentiate at the elementary vs secondary level? And if so, can you share strategies you recommended at each level to our teachers?</p>	<p>Yes. The training included differentiation for both elementary and secondary classrooms and also addressed best practices and AI literacy for both staff and students. The objective was to help educators understand generative AI, including how large language models are trained and things to watch for such as mis and disinformation, bias, hallucination, data privacy, the importance of verifying information, and environment impact. Teachers were also introduced to ways AI can support their work, helping to redirect time spent on administrative tasks to directly supporting student learning.</p> <p>The training also emphasized foundational skills, critical thinking, and college and career readiness. Examples of student AI use were presented for both elementary and secondary contexts and were framed by AI literacy, with supporting resources available through Wayfinder. At the secondary level specifically, the AI Acceptable Use Scale and syllabus statement were introduced. It may be important to note that BLS maintains an internal AI site for AI resources, is currently drafting a generative AI webpage for the new BLS website, that educators and administrators have access and opportunities to connect with the EdTech team on additional optional trainings, and that BLS AI practices are aligned with the Oregon Department of Education’s AI guidance.</p>



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
<p>Not a question re: this letter in particular, but the board has been told we do not have non-digital curricular options. However, I was told Desert Sky Montessori does not use Ipads. Is this true, and if so, does this mean it's possible for non-digital curriculum at the elementary level?</p>	<p>Standards for digital literacy appear in Oregon State Standards for English Language Arts in the Elementary school years and in multiple subject areas in 6-12th grade. The Oregon State Assessment System, beginning at grade 3, is delivered via computer adaptive tests. The elementary assessments that we have adopted (ROAR, Playgrounds, and mClass) are delivered electronically. The advantage of these assessments is that they are typically “adaptive” to the student skill development and can be extended or scaffolded on an individual basis. This is considered best practice and provides important diagnostic information to decision making teams. These tools also allow for quick calculations of student individual growth and effectiveness of school-wide or classroom wide instructional initiatives.</p> <p>The elementary curricula approved by the Board have some digital components, but are vastly based on teacher directed instruction, student discussion and activities, and paper-pencil assignments. Amplify, EL Reading, and Really Great Reading all have paper-pencil workbooks that are used for the majority of student independent work and use digital tools primarily for assessment, intervention support (e.g, Amplify Boost), and practice, not content instruction.</p> <p>Desert Sky uses a Montessori curriculum; however, engages in assessments electronically as well.</p>
<p>I don't see any statement on gamified learning – does the district take a stance on this? And does gamification, concerns about dopamine/addiction with this style platform, play a role in how we choose to adopt platforms, apps, etc?</p>	<p>In our appropriate technology use outline, we share that students should not be using tools as a reward. However, some digital tools that offer practice opportunities for students are designed in a way to give immediate feedback to celebrate success. This is different from gaming. In this situation, students receive feedback to reinforce learning of a specific target skill which is also a tactic used in in-person instruction as well. All of our digital practice tools are created with students in mind and designed to create a fun experience.</p> <p>Curriculum that is adopted or approved goes through a process of evaluation which also considers the quality of the digital tools. We use standards from ODE curriculum review, alignment with Oregon Curriculum standards, and the following workflow to ensure that curriculum is evaluated and deemed appropriate for use by the grade level it is requested for and that it meets all technological and privacy requirements. Our Learn Platform tool has an extensive community library of educational technology tools that frequently have external evaluation scores and privacy information. We also use Common Sense Media and ITSE standards when exploring tools.</p> <p>If a product encourages students to engage in gamified learning that is not linked to curriculum, we have the ability to turn-off functions that do not align with our scope and sequence or lesson goals. If we are unable to easily manage accessibility with a product, that would be a reason that we would not select the tool.</p>



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
<p>It says we are actively working to monitor screen time. Can you tell me more about that? We've been asking for screen time reports for years, and have been told we do not have that capacity currently and would take an investment in new software we cannot afford.</p>	<p>Last year we did fund a rapid-cycle evaluation focused on specific instructional applications used at the elementary level—DreamBox and Lexia. As part of that evaluation, we examined student usage data within those applications, including the amount of time students spent actively engaged in them. While this does not provide a comprehensive measure of overall screen time, it did allow us to review how much time students were spending in these particular instructional tools and evaluate their effectiveness.</p> <p>Apple does not provide the functionality required to monitor screen time usage from an organizational level, so we do not have a realistic way to collect comprehensive usage data across all BLS student devices. To better understand how devices are being used, we are gathering information through alternative methods that can help provide a snapshot of screen time usage. These include:</p> <ul style="list-style-type: none"> ● Learn Platform is a tool that allows us to see which websites and programs are used by students at every grade level and rank orders them according to the number of students who have accessed the tool in a given time period. The tool also allows us to see how many “instances” a tool is used during that period. ● Screen time survey: Our EdTech team is currently working with a sample group of elementary teachers across several schools who are manually logging student screen time that reflects daily usage measured in time spent using digital tools in their classrooms and the tools that are being used. We have the results from our first group of K-2 teachers and will be prepared to share that data shortly. ● Vendor data: Some vendors collect usage data within the tools they provide, which can give insight into how often those specific applications are used. Examples are Dreambox, MagicSchool, Canvas, Clever, and Seesaw. These are regularly reviewed. ● We are currently exploring alternative tools that may allow us to get more detailed information about the number of minutes a student spends within a platform. Making a switch will likely result in additional costs and will require set up and training time to fully implement.



District Follow-up to Board Member Questions and Comments Received

Question Posed/Comment Received	Notes/Comments:
<p>An editorial from Bloomberg News that the Bulletin ran earlier this week referenced school district contracts that require student online time (without detail – maybe this means curriculum that can only be delivered digitally?).</p> <p>Is Bend-La Pine a party to any agreements like this, and if so, can you share those with us?</p>	<p>We are not aware of any agreements with vendors that require a particular amount of time engaged with a specific vendor platform. Our contracts are generally around the privacy and security agreements and cost. Vendors frequently specify the amount of time they recommend a student to use the product in order to obtain the results that are published in efficacy studies but this would not be a part of a contract. Any contract that would require a certain level of usage would certainly raise concerns as a school district maintains its autonomy with respect to when, how, and where curriculum is delivered, pursuant to state guidelines.</p>



REPORT: Social Science Materials Review and Adoption

PRESENTED BY: Dean Richards, Director of Secondary Curriculum, Instruction, and Systems

EXECUTIVE SUMMARY:

Bend-La Pine Schools conducted a review of social science instructional materials across grades 6–12 to assess alignment with standards, instructional priorities, and student learning needs. This process supports the district’s commitment to ensuring all students experience high-quality, engaging, and inclusive social science instruction.

Materials Review Process

The review followed a structured 2025–2026 timeline and included an analysis of currently adopted materials at both the middle and high school levels. Educators evaluated materials for alignment to standards, coherence across grade levels, and their ability to support critical thinking, multiple perspectives, and meaningful student engagement.

Teacher input was central to the process, ensuring that findings reflect both instructional priorities and current classroom realities. The review focused on identifying strengths of current adoptions as well as opportunities to improve consistency and coherence across the system.

Key Findings: Middle School

The current Middle school social science program, TCI, supports a clear and coherent instructional pathway across grades 6–8.

Key strengths include:

- Strong alignment to standards and course progression
- Consistent use of core instructional materials across grade levels
- Ongoing instructional support for teachers through coaching and professional learning

The primary need at the middle school level is continued investment in professional learning and implementation support to ensure consistent, high-quality use of adopted materials in all classrooms.

Key Findings: High School

High School teachers are largely satisfied with the current materials.

Key findings include:

- Core materials for required courses were largely adopted in 2020, with some areas deferred for future review
- Importance of Supplemental Materials

Supplemental materials play a critical role in social science instruction across all grade levels, but especially in high school instruction. Teachers regularly incorporate resources from multiple perspectives and reputable sources to enhance core curriculum such as primary source documents.

These materials are essential for:

- Promoting critical thinking and inquiry through primary and secondary sources
- Connecting learning to current events and timely real-world contexts
- Ensuring culturally relevant and inclusive instruction
- Supporting student engagement and deeper understanding

Note: We do not have adopted materials for AP and IB courses. These courses require specialized training that occur outside of Bend La Pine. Teachers who attend AP and IB trainings are given options of texts for instruction. We allow teachers to use AP and IB approved text for the courses that they teach. At times, this means that teachers use different AP texts for the same course at different schools. However, the AP experience is maintained through instruction and assessment.

Conclusion:

Across the system, high-quality instruction depends not only on core materials but also on the effective use of supplemental resources and ongoing professional learning. Continued focus in these areas will support equitable, engaging, and rigorous learning experiences for all students. We will move forward with the adoption of materials at the middle school level, building on the strong momentum and effectiveness of the current resources. At the high school level, we will defer adoption for one year.

April 14, 2026

Social Science Materials Adoption

Dean Richards, Director of Secondary Curriculum, Instruction and Systems

Monica Freeman, 6-12 Social Science Instructional Coach

Jessica Colburn, Middle School Social Science Teacher, PCMS

Kolina Watt-Garcia, Dual Immersion/Social Science Teacher, CHS

We Believe All Social Science Learners...

- are entitled to quality instruction that is connected to standards and outcomes.
- have educators who positively influence and impact student identities.
- are capable of learning and thinking like a historian and social scientist.
- can, and should be, independent thinkers and doers of social science.
- have individual learning styles.
- come from diverse cultural backgrounds, which shape their perspectives on the social sciences.
- view what success looks like based on individual, personal experiences.
- will be more successful if teachers create a safe environment in which to take risks, make mistakes, and have difficult conversations.
- need family connections and support for student success.
- adapt to content, learning environments, and teaching methodologies.
- pursue higher ideals and better solutions/answers when they collaborate on problem-solving. This includes sharing resources to support our students.
- are informed, active, and responsible members of their communities.
- consider the ethical implications of actions and decisions in both personal and social contexts.
- foster an understanding and promotion of democracy, human rights, and the rule of law.
- engage in curriculum and tasks that are purposeful, relevant, and engaging, with meaningful and rigorous tasks.
- question assumptions, examine the evidence, and consider multiple perspectives before forming conclusions.
- collaborate on projects and engagement in discussions, helping to understand the importance of working together to address social issues.
- approach reading, analysis, and writing through the lens of a historian or social scientist.



2025 Social Science Review Timeline

Inventory and Interest gathering
Review State Approved IM
Begin initial review of programs.

October

Review State Approved IM
Field Testing

January

Supplementary Material
School Board Presentation
Approval

March-April

November-December

Publisher Caravans
1st round selection with
IMET

February

Field Test
Field Test Feedback
Consensus
Proposal

May

Materials Training

Current Middle Level Social Science Adoptions and Pathway

Adopted 2026

6th Grade

- *Ancient World History* (TCI)

7th Grade

- *Medieval World History* (TCI)

8th Grade

- *US History* (TCI)



High School Social Sciences Courses

Modern World
History

US History

AP US
History

IB-Prep US
History

Government/Civics

AP
Government
and Politics

IB Global Politics
SL/American
Government

Electives

Criminal Justice
Criminal Law
Economics
Law 1
Law and Order/Legal Studies
Psychology
Religion of the World
Sociology
World Issues

AP/IB

AP Human Geography
AP Psychology
IB Global Politics HL
IB Psychology

*Civics is a state requirement



Current High School Social Science Adoptions

Modern World History- Defer 2026

- HMH *Modern World History* (Adopted 2020)

United States History

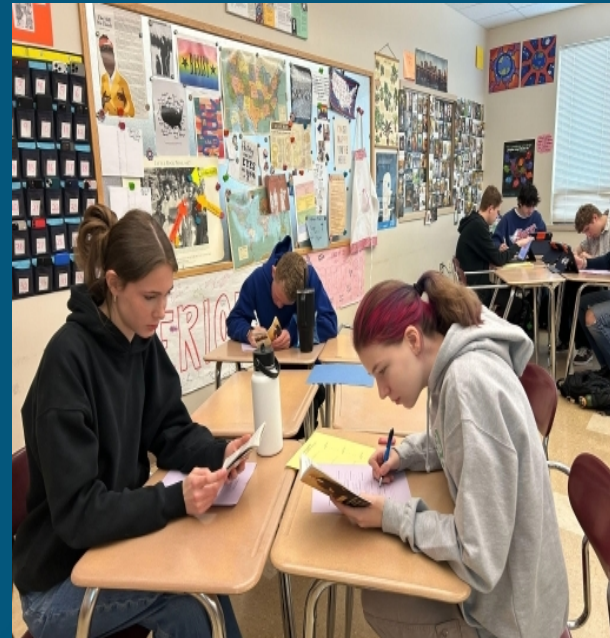
- Cengage *America Through the Lens* (Adopted 2020)

American Government-Defer 2026

- Glencoe: *American Vision* (Adopted 2020)
- McGraw-Hill: *US Government Our Democracy* (Adopted 2020)
- TCI: *GOV Alive* (Adopted 2020)
- Cengage: *The Challenge of Democracy* (Adopted 2020)

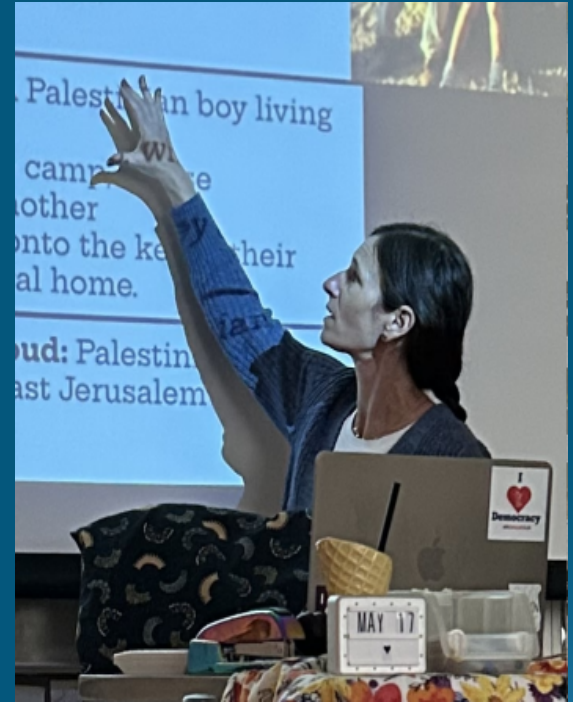
AP/IB Materials

- These global programs provide professional development and approved materials for teachers.



Supplemental Materials

Teachers thoughtfully select and utilize a range of instructional resources—drawn from multiple perspectives and reputable sources—to support meaningful teaching and learning experiences.



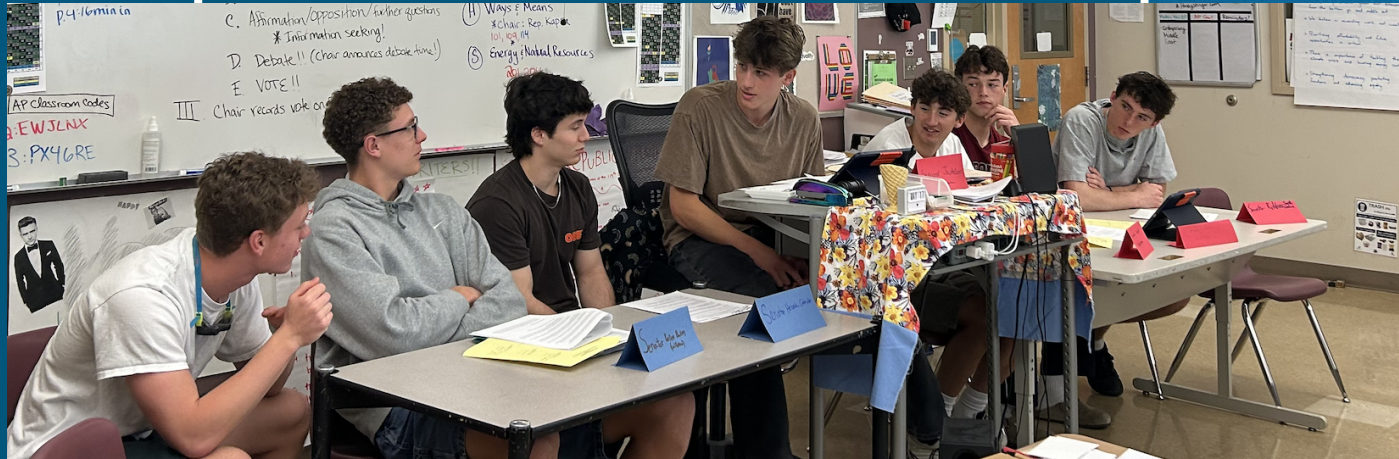
Professional Learning Plan

- **Middle Level** - TCI
- **MWH** - TOSA support. Materials have been in use
- **USH**- TOSA support. Materials have been in use
- **GOV** - Teacher collaborative scope and sequence work (26-27)





QUESTIONS?
THANK YOU!





REPORT: Standards Based Instruction and Grading Update

PRESENTED BY: Stephen DuVal, Executive Director of Middle Schools
Katie Legace, Executive Director of High Schools

EXECUTIVE SUMMARY:

This update provides a high-level overview of progress on the district's transition to standards-based instruction and grading. The initiative is focused on improving clarity, consistency, and alignment between instruction, assessment, and student learning.

The Board will receive a summary of current grade data, an update on professional development efforts, and insights from early adopters. Initial feedback highlights both positive momentum and areas where continued support is needed.

As the district prepares for full implementation in the fall, the focus will be on refining practices, supporting staff, and ensuring clear communication with all stakeholders. Overall, the initiative remains on track and continues to evolve through ongoing learning and feedback.

April 14, 2026

SBIG Update

Katie Legace and Stephen DuVal

Grade Data Review

- Pulled a list of early adopting teachers who taught the same course in 2025-26 and 2023-24.
- Does not account for teachers who changed grade
- Courses under 20 students were removed
- Some percentages may not reach 100% due to P/NP, Inc, and W
- Where possible, matched Semesters/Trimester timelines
- MS data is not included
 - CMS and PBMS have no pre-SBG comparisons
 - HDMS use is still varied
 - Small sample size at PCMS
 - Too easy to determine which staff is being used in data collection



Data

High School A's

- 2023–24 (Traditional): ~43.4% A's
- 2025–26 (SBG): ~44.7% A's

→ High School A's increased slightly (~+1.3 percentage points).



Data

High School F's

- Traditional: ~4.3%
- SBG: ~5.0%

→ Slight increase in grades
(~+0.7 points).



PD Updates

Weekly drop in meetings

Weekly email with supports and answers

4 admin and ICCL trainings a year

Teacher led PD



Semester Planning
[Note - Unit Plan on Separate Tab]



Course Name:

List standards assessed this term (when planning for the second semester, use "Standards Analysis" in Synergy Gradebook to identify areas of additional support):

- 1.
- 2.
- 3.
- 4.
- 5.

Standard Map/Tracker:

	Standard	Standard	Standard	Standard	Standard
Unit					
Unit					
Unit					
Unit					
Unit					

Example from Lit & Comp 3, Emilie O’Neill

Second Semester Planning

Course Name: Literature and Composition 3

Standards:

Reading

1. R1: Reading - Understanding the Text
2. R2: Reading - Interpreting the Text

Writing

1. W1: Writing Process
2. W2: Writing Organization, Purpose, Evidence, and Reasoning
3. W3: Writing Vocabulary and Conventions

Speaking & Listening

1. SL 2: Speaking and Listening - Product

Standard Map/Tracker:

	Standard	Standard	Standard	Standard	Standard	Standard
Unit 1: Poetry (6 weeks)	R1	R2	W1	W2	W3	SL2
Unit 2: Book Clubs (6 weeks)	R1	R2	W1	W2	W3	SL2
Unit 3: Personal Statement (5 weeks)	W1	W2	W3			

Unit Break Down: Poetry

Standards Addressed	What tasks will students use to show evidence for this standard?
1. R1: Reading - Understanding the Text	<ul style="list-style-type: none"> • Poet Research Project: Poem analysis • Poetry Packet
2. Reading - Interpreting Meaning	<ul style="list-style-type: none"> • Poet Research Project: Poem analysis



College Partners

- In communication with COCC and OSU Cascades about our new system.
- Both are in support - future joint statement in support from presidents of both institutions



Feedback

Early Adopter Survey
Conversations with SVC
Future listening sessions at secondary
schools



Early Adopter Takeaways

Positives:

- **Instructional Alignment (Conceptual Buy-In)**
- **Student Transparency**
- **Willingness to Engage**

Concerns:

- **Grade Inflation / Deflation Anxiety* (Data taken before report cards)**
- **Decaying Average: Percentage, Not Purpose**
- **Technology Friction (Synergy > Canvas)**



Next Steps

- Differentiated PD heading into next year
- Continued work on standard and rubric editing
- Common assessment work
- Backwards design work





QUESTIONS?
THANK YOU!





REPORT: Fundraising, Donations, and Public Gifts: Policy Revision Update

PRESENTED BY: Kinsey Martin, Executive Director of Policy and Advocacy

EXECUTIVE SUMMARY:

Bend-La Pine Schools recognizes and celebrates the amazing support our community—from individual families to local businesses—contributes to our schools via fundraising, donations, public gifts, and other resources in service of our students. Without this community support, we could not offer the programs, activities, and enrichment opportunities available to our students. And at the same time, we also recognize the shortcomings of our current fundraising policies and practices. These systems are outdated, inequitable, and inefficient for our current needs.

A two-year process has been underway to revise and update our fundraising systems, which include a significant range of policies and procedures across all schools and departments within the district. The process has involved substantial community and stakeholder engagement, including dozens of listening sessions, conversations, and ongoing feedback cycles with students, staff, leaders, families, businesses and donors, and program- and region-specific roles. We analyzed financial data, stakeholder voices, and current district infrastructure. Research on promising practices across the state and country was conducted as well.

This presentation will serve to update the Board and community on the proposed policy direction that has emerged from this collective community work, and the commitments, next steps, and structures that will develop over the next 3, 6, and 12+ months.

Re-Imagining Fundraising and Donations Policies and Procedures

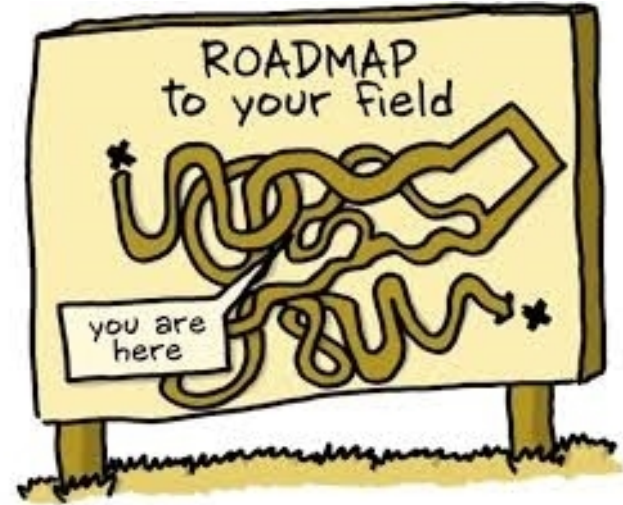
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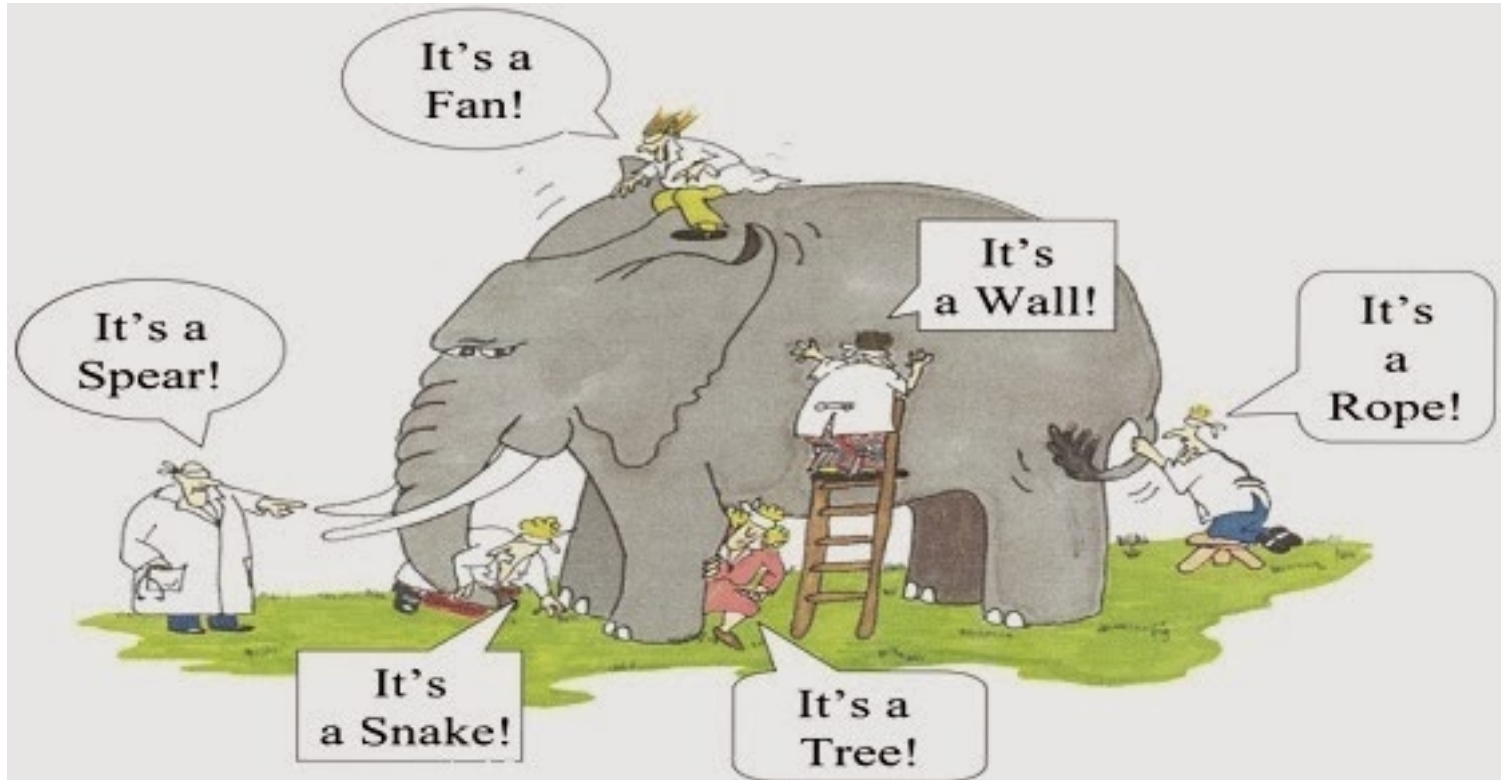
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S C H O O L S

Agenda

- **Where have we been?**
 - Roadmap and timeline
 - Funding snapshot
 - Stakeholder input
- **Where are we going?**
 - Current work underway
 - Proposed next steps
- **What do you think?**
 - Q-and-A, discussion, and feedback

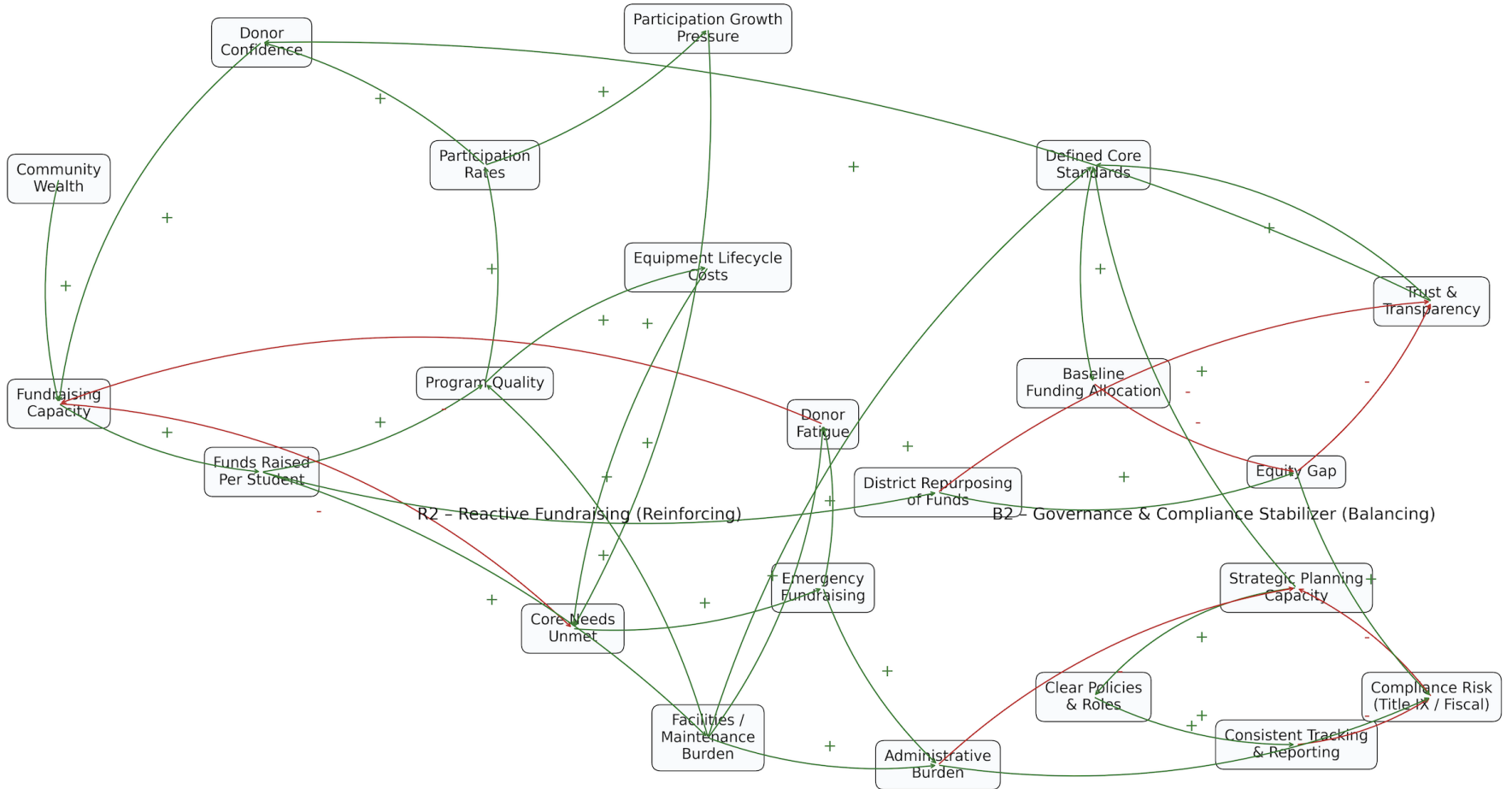


What's the problem we're trying to solve?

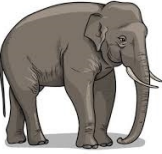


R1 - Wealth Amplification (Reinforcing)

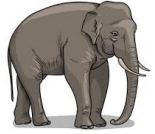
B1 - Baseline & Equity Stabilization (Balancing)



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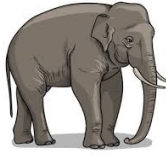


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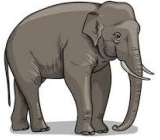
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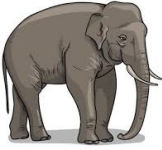
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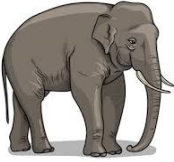
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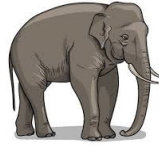
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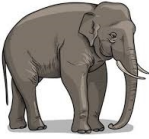
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- Community members experience disjointed, overwhelming, and unclear requests to support constant school and program asks.
- Leaders are not given clear direction as to priorities, approval guidelines, or oversight to support their students, staff, and parents.
- Lack of common standards for basic needs across schools/programs causes confusion and significant discrepancies.
- Inability to monitor and enforce compliance with federal obligations and fiscal requirements causes inequity, vulnerability, and asset deterioration.

Decision-Making Process

- Equity Lens
- Board Policy



Options/Decisions:

1. Status quo
2. Sister schools or buddy system (for schools and/or programs)
3. Threshold mush pot model: obligatory contributions to centralized fund, after a threshold amount is raised
4. Mush pot model: obligatory contributions from all donations or fundraisers to centralized fund
5. Fundraising/donation priorities, with opt-in mush pot available



- A. Update administrative practices such as approval, communication, student voice
- B. Shift district funds and practices to account for federal obligations

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- A. Update administrative practices such as approval, communication, student voice
- B. Shift district funds and practices to account for federal obligations

What does this look like?

- No obligatory contribution to centralized fund (*capital projects)
- Opt-in structure via form
- District annual list of priorities
- Committee to review and distribute centralized resources
- Articulation of program standards
- Administrative updates



March – June 2026

Establish Governance Foundation

Adopt Board Policy

Supplemental funding definition
Equity & Title IX commitment
Transparency expectations

Adopt Administrative Policy

Clarify roles & authority
Define approval thresholds
Centralize oversight

Issue Administrative Regulations

Approval workflow
Sponsorship standards
Donation acceptance process

Standardize Forms & Tools

Principal approval form
Donor commitment template
Centralized contribution account

Summer – Fall 2026

Institutionalize and Standardize

Committee Development

Accountable/ transparent structure
Committee membership

Priority Project List

Identify projects
Develop commitment-facing tool

Implementation Training

Key employees/positions
Parent leaders - Handbook

Communication

Update and inform community
Community feedback loops

2026-2028+

Monitor and Optimize

Define Baseline Standards

Athletics & safety core
CTE equipment standards
Program baseline requirements

Implement Annual Title IX Audits

Participation snapshot
Financial analysis per pupil/athlete

Publish Equity Metrics

Centralized fund reporting
Update to board and community
Ongoing priority project lists

Coordinate Fundraising Market

Engagement with Boosters/PTAs
Financial transparency
Manage donor saturation

Thank you!

- Celebration and appreciation
- Community feedback in packet
- Questions

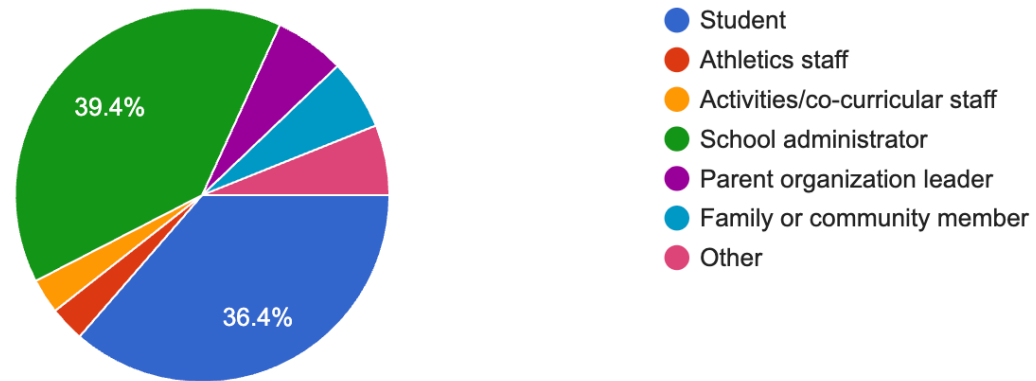


**"There is no
power for change
greater than a
community
discovering what
it cares about."**

MARGARET J. WHEATLEY

Fundraising Feedback

Input from:



Level of support for district plan:



(85% support or fully support)

Question 1 of 3: What did you hear that you liked or that you believe will work well?

Comprised between shared mush pot needs to be transparent but should work

Attention to equity

Equity is important for me since we have not had any extra community monies coming in for a while .

The final decision seems best.

No Centralized Fund / Obligatory Mush Pot

Mush pot for all

New ideas and new thinking that puts equity at the forefront.

I like the direction this is going. Clarity is really helpful, and I like the idea of moving that direction.

Great synthesis of the listening sessions

More equity is on board

Creating priorities and balancing funds to other schools.

It feels like a good first step- compromise

Thoughtfully process. Considered various perspectives and community needs.

That we are moving from the Wild West to some awareness and alignment

Clear articulation of choices for donors and district

A level of expected experiences

Equitable ideas for lower SES schools.

Standards, communications and transparency, identifying needs

I like the opt in, but would like more guidance on how this works in practice. For example we use different platforms to collect \$ (give butter, read a thon, etc). Where are we including the opt in "form" the process. Outlining this more clearly with examples would be helpful.

I think the overall concept (streamline giving, determine priorities, have an "opt in" slush fund) is fantastic, and would benefit the schools, programs, and high-level donors greatly. Of the five options presented, it struck me as clearly the best.

The idea of a slow gradual transition into the final hopeful #3 policy.

I like the optimism and belief that it is possible and will work

The idea that we're working to more equity

The idea that smaller clubs would get more funding

I liked option three

Although I like option three, I believe this will work the best within the community to continue getting sponsors

I like the idea of having a community fund for larger district projects, and making sure money will be routed to where it is needed most.

I like the idea of leading in the community slowly because my fear if we rush it is massive amounts of pushback that are avoidable.

I liked this idea when looking at the inequities between schools and sports team

I like that they are easing into the idea of sharing the funds,

I like how it's working towards a bigger picture and goal to create equity between schools and programs.

I believe the optional mush pot would peer pressure businesses to donate just a little more, similar to how customer service employees ask for a tip.

Question 2 of 3: What did you hear that you didn't like or that concerns you?

Being clear with mush pot allocation.

Number 4 Consistent oversight

Staying at school level rather than micro managing. (Answered. Not a concern)

N/a

We need to consider all the other factors that contribute to the need to fundraise.

None

Only 3% taken off the top? Why not more?

N/A

I feel like parent organizations are going to look for and find loopholes and ways to work around this effort.

I would love to see a more aggressive effort to balance these funds - I understand this will take time.

If one team gets funded a lot then give them less next year and give more to other team that didn't raise as much. Why not fund for sports at a school and then decide how it is divided depending on how much it costs to run the program

Seems like a workload add to a current role at the district office. Wouldn't want it to cause any added positions. II

Worries that it's a large beast to diligently maintain and as people and roles change will it maintain momentum

Concerned about completing capital projects for under funded school such as la pine. Getting an accurate list of needed projects/funding for each school maybe more difficult then expected

Required sharing of large parts of our fundraising dollars.

not sure i saw recognition for supporting programs

I know we aren't going with the buddy school option but I believe PTOs/PTAs would be happy to donate funds to a "mush pot" if we have agency to decide where the money goes.

I'm concerned about the implementation, particularly with anyone other than "big ticket" (e.g corporate, high net-worth families) donors. I think there are some pretty significant potential pitfalls to be avoided. When I think about our program, which is fully self-funded, the vast majority of our fundraising efforts don't involve going to the community and asking for money (the type of fundraising that would lend itself extremely well to presenting someone with a form and asking them to designate what goes where). Rather, they're things that involve small donations for some service rendered, or a third party intermediary that runs an event, or even someone just showing up at the theater with a truckload of lumber to build a set.

My big concern is that if the district, rather than laying this policy down as a guideline or mandating it for pure giving / donations, dictates that no fundraising / donations are allowed outside of this framework. That would hobble us, frankly. And I suspect we're far from alone. So I would encourage deep thought into how specific cases would work in practice and potential carve-outs for things like non-monetary donations or small amounts.

I think the entire system needs to operate as a grant program with an oversight committee to determine the recipient of the grants.

I am concerned about small level clubs in the district

What about smaller clubs and community businesses that don't always attract big donations. I'm also curious how this affects fundraisers with non monetary contributions.

There isn't enough variance in how much money the club needs to function before it's taxed.

I don't like how there might not be small clubs or unknown things considered if we go with option five

I still wonder how the advisory board will choose what schools to give the extra money to

I am concerned that most companies will not donate toward the community fund, causing us to be basically where we are at currently.

I think my concern is no one want to put anything into the mush pot and not bring able to get any money into it

I feel like schools who are already fundraising less will still get less help because companies are gonna want to stick with the schools that they are already donating

Now we have to have a person or committee that decides on the spending options

how long it will take, losing sponsors, and making sure to be open about what's going on

If a program such as the theater program at caldera raises \$25,000 from a production (which caldera has raised with their fall show), will that money be split between the other schools in the district, despite it being entirely caldera raised? Will that money be given to schools without theater programs be given money, despite not having a program?

How will you keep track of middle schoolers attending events to then reimburse schools?

Question 3 of 3: What follow-up questions or suggestions do you have? Moving forward with this proposed plan, what does support for your role look like?

Clarifying questions made be more onboard.
Just must be absolutely transparent with mush pot needs.

How will we track the money that a parent group raises?

Clear priorities and regular support through levels meetings.

Consistent Coding in Athltics to reflect accurate spending by sports.

Just continued communication. Change just takes time I think going slow will be best received.

Clear information and training on this

After watching high school students have to drive themselves to an in town game in the snow it seems part of the common expectation for teams needs to involve providing a ride to local events (low cost and might help to prevent a student accident)

We had a Q & A so all good!

I wonder how the "mush pot" and BLS foundation might have overlapping roles. Are there some efficiencies possible through this organization.

Id be intrested in the committee for the general fund, making sure la pine has representation and an accurate list of needs.

I'd be very interested in the percentage of funds the committee decides will be ahared.

identifying and funding projects/programs we want to support

As a PTO president we need support in auditing our bylaws to ensure they are aligned with other PTOs/PTAs bylaws. We also need more support / training for parents so they understand what resources are available to them. Both district resources (field trip funds, school supplies) and what other community partners can provide (ed fund, on pointe, etc). I recommend the district looks into AI tools like notebook lm that can store all of the fundraising policies and allow everyone to be operating and interacting with the same core set of documents.

I'll provide input on the district site, and follow along closely with the process. I'm also more than happy to provide any input requested. Thank you for your work on this!

Keep up the great work!

I think having a hearing session for a longer time like the one with Mr. Duvall would be good.

I just think the district needs to plan a bit more and have more answers before they talk to students and community like this.

What will the process be to distribute the money? I'm curious to see where this goes?

If businesses want to opt in to the fund, maybe have them select which project to contribute toward, similar to a GoFundMe, but through the district?

I don't think I have a lot of questions till we see what the school board says

Hit me up for being on the committee I'll be at COCC and I went to REALMS High and have never extensively done a school club or sport so I have minimal bias

I will support as a student lead club leader, athlete and CTE student

Stakeholder Engagement Summary: Experiences with Fundraising and Donations in Bend-La Pine Schools

I. Purpose

This memo summarizes key themes from district listening sessions conducted with families, students, staff, donors, and community partners to inform revisions to the district's fundraising, donation, and gift policies.

II. Key Findings

1. Current practices exacerbate inequity

Fundraising success varies widely by school and program based on community wealth, donor access, and volunteer capacity rather than student need. Stakeholders identified resulting disparities in student experiences and resources, including **Title IX concerns** and unequal access between athletic and non-athletic programs.

2. Fundraising covers essential and safety-related needs

Fundraised dollars are frequently used for **core operational, safety, and facilities needs**, not just enrichment, including athletic safety equipment, travel, required CTE equipment, and basic maintenance. The absence of **districtwide baseline standards** drives reactive fundraising and deepens inequities.

3. Fragmented systems create compliance and sustainability risk

Fundraising approvals, advertising, renewals, tracking, and spending vary widely across schools and programs. These inconsistencies increase legal and fiduciary risk, create confusion, and place individual staff in difficult decision-making positions. Stakeholders support **clear guardrails, standardized tools, and consistent expectations**.

4. Transparency and planning would improve trust and outcomes

Students, parents, donors, and staff seek clearer information about funds raised, spending decisions, and district priorities. Improved **annual and multi-year planning**, clearer communication, and feedback loops were identified as key strategies to reduce donor fatigue and support more strategic, equitable use of resources.

5. Equity should preserve local agency

While there is broad support for addressing inequities, stakeholders cautioned against approaches that discourage community generosity or eliminate local initiative. Many favored **differentiated or hybrid models** that balance equitable district allocation with locally driven fundraising and reflect differences in school and program context.

III. Policy Considerations

Taken together, stakeholder feedback indicates that existing policies no longer adequately address the scale, complexity, or impact of fundraising, donations, and gifts in the district. Updated policies are needed to:

- ensure compliance with Title IX and applicable fiscal and accounting requirements;
- establish clear baseline standards for programs and facilities;
- reduce inequities driven by fundraising capacity rather than student need;
- provide consistent guardrails, roles, and approval processes;
- increase transparency, accountability, and long-term sustainability; and
- preserve community engagement and local initiative while centering student opportunity.



ACTION: Board Policies for Adoption – April 14, 2026

PRESENTED BY: Kinsey Martin, Executive Director of Policy, Advocacy, and Equity

EXECUTIVE SUMMARY:

Bend-La Pine Schools has a multi-part, policy and regulation review process. The district shares policies and regulations that are currently in review at regularly scheduled school board meetings and then following the meeting allows time for, and considers, public feedback related to the proposed changes. The district also has several student, staff, and community groups that review policies and provide feedback. The Oregon School Boards Association (OSBA) releases a Policy Update several times a year with changes to policies and regulations as a result of changes in legislation. The district reviews the required and recommended changes before adopting any changes. Public feedback is not solicited on these policies as the updates align with requirements set forth in laws and regulations.

The following Board policies will be adopted as presented. A brief summary of the proposed changes are listed below and a redline version of each follows this executive summary.

Policy / Regulation Title	Reason for Update
KMC-BP: Community-Funded Programs and Activities	<p>New Board policy governing the community funding of programs and activities in Bend-La Pine Schools in alignment with OSBA sample policy supporting the inclusion of Board-level policy as part of the regulations governing fundraising and donations. This is a matter of substantial interest to the community at large, and is directly connected to budget, curriculum, and student outcomes, all of which are considerations under the Board’s governance. A Board policy such as the draft included here would allow the Superintendent and district staff to manage fundraising regulations and operations in accordance with the Board’s overarching guidance and direction.</p> <p><i>See attached document for feedback received.</i></p>

Summary of community feedback on KMC-BP:

The feedback submitted clearly supports the policy’s goals (particularly equity and consistency) but expresses concern that key terms and processes are too vaguely drafted. Themes include requests for details on definitions, approval processes, specific standards, and timelines.

Response to this feedback: This level of more detailed procedural information requested in the feedback is most appropriate for an Administrative Policy or Regulation, and we believe these issues will be clarified in subsequent AP and AR development. This policy, KMC-BP, sets the overarching values and guardrails for the topic as a whole—as it’s written, we feel it provides appropriate governance for us to draft the operational APs and ARs, and we are confident that community members’ feedback will be addressed in those upcoming drafts.

Recommended Motion:

I move to adopt KMC-BP as presented.



The Board recognizes the important role that families, community members, local businesses, and partner organizations play in supporting the districts' schools and programs. Local generosity enhances educational opportunities, reflects shared commitment to student success, and enriches our broader community.

The Board also recognizes that fundraising capacity varies across schools and programs. In alignment with the district's [Equity Stance](#) and [Educational Equity policy \(JBB-AP\)](#), fundraising systems should be designed to eliminate predictable disparities in the access, experiences, and outcomes students have across different schools and programs. The Board commits to ensuring that all fundraising, donations, sponsorships, and public gifts align with district values of equity, transparency, accountability, and responsible stewardship.

The Board establishes the following expectations:

1. Supplemental Funding
Fundraising and donations shall supplement, not supplant, district funding of core educational programs and services. The district shall define baseline standards for programs and facilities to promote equitable student opportunity.
2. Equity and Compliance
Fundraising activities and acceptance or allocation of donations shall promote equitable student access and comply with Title IX and all applicable nondiscrimination and fiscal requirements.
3. Transparency and Accountability
The district shall maintain clear and consistent processes for the approval, tracking, reporting, and allocation of funds raised on behalf of its schools and programs.
4. Consistent Oversight
Fundraising, sponsorships, advertising, naming opportunities, and public gifts shall be subject to standardized approval processes, defined roles and responsibilities, and established guardrails.
5. Sustainability and Alignment
Fundraising activities and acceptance of gifts shall align with district priorities and long-term planning, including consideration of ongoing operational obligations and lifecycle costs.

The superintendent shall develop and implement administrative policies and regulations necessary to carry out this policy, including procedures for approval, financial accounting, equity review, sponsorship standards, and Board review thresholds when appropriate.

Nothing in this policy is intended to discourage community partnership or local initiative. This policy is intended to ensure that community-supported programs advance districtwide equity, transparency, and student opportunity.

END OF BOARD POLICY

REVIEWED: 3/10/26

APPROVED:

POLICY / REGULATION CROSS REFERENCE

LEGAL REFERENCE

[ORS 294.305 to -294.565](#)

[ORS 328.441 to -328.470](#)

[ORS 332.505](#)

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2012); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2017).

Public Comment:	Submitted by:
<p>In the expectations, #1 "supplemental funding" it may be important to have a clear definition of what it means to supplement and not supplant a budget so that it is clear to finance, building leaders, and teachers. This will be especially important for high cost school programs like ceramics, CTE, theater, etc, so that we are working from common definitions.</p> <p>Again, in #2 "equity and compliance" how do we define what "equitable student access" means? If we will be expected to comply with this policy as soon as it's adopted, it will be important that we all have a common understanding of what that means and how it is to be determined. How do we know the difference between "equitable" and "equal"? What do we mean by "access"? They are big words that can be broadly determined with a wide variety of understanding--which is sometimes ok in policy language as the grey allows for schools to implement with their own students needs in mind, but can also be confusing for those trying to manage or uphold the policy.</p>	<p>Donna Servignat</p>
<p>Everything looks pretty good, I only have a question on "4. Consistent Oversight</p> <p>Fundraising, sponsorships, advertising, naming opportunities, and public gifts shall be subject to standardized approval processes, defined roles and responsibilities, and established guardrails." do we have an outline of what those guardrails are? And if so, should we use a more layman's terms approach to that and less of a law-speak approach so everyone knows exactly what the terms are?</p>	<p>Katherine Blodgett</p>
<p>Hello, thank you for the opportunity to comment on this policy. Overall the policy appears vague. It seems to allow for the school district to create "standards" under this policy that will not be reviewed by the school board. Community members and families who want to support schools will be asked to follow these standards without any input from the school board members we elect to review policies and procedures.</p> <p>For example, expectations 1, 3, and 4 "Supplemental Funding - Fundraising and donations shall supplement, not supplant, district funding of core educational programs and services. The district shall define baseline standards for programs and facilities to promote equitable student opportunity. Transparency and Accountability - The district shall maintain clear and consistent processes for the approval, tracking, reporting, and allocation of funds raised on behalf of its schools and programs. Consistent Oversight - Fundraising, sponsorships, advertising, naming opportunities, and public gifts shall be subject to standardized approval processes, defined roles and responsibilities, and established guardrails." It doesn't sound like these processes and standards will be reviewed by the school board.</p> <p>The last part of the policy is the only part that states it will come before the school board again for approval "The superintendent shall develop and implement administrative policies and regulations necessary to carry out this policy, including procedures for approval,</p>	<p>Renee Goin</p>



Policy and Regulation Public Comment Received by 5:00 p.m. April 3, 2026
 KMC-BP: Community-Funded Programs and Activities

Public Comment:	Submitted by:
<p>financial accounting, equity review, sponsorship standards, and Board review thresholds when appropriate." Even this seems to leave openings for school district admin to create standards that do not get reviewed by the school board.</p>	
<p>While I 100% support the intent of this policy and the reasoning behind it, with cut backs on the horizon, how will the district implement the expectations outlined in the policy?</p> <p>Specifically, "Transparency and Accountability" and "Consistent Oversight".</p> <p>Meeting this objective could almost be a full time job as we have nineteen elementary schools, seven middle schools, and beginning next year, six high schools. Or will these responsibilities be distributed and placed on already full plates, about to become more full due to our significant funding shortages?</p>	<p>Tina Bandy</p>
<p>I wanted to share that we looked at this several times when I was on the board. We found that the opposite happened and schools raised less money and what was happening was people would just buy directly what the program needed so for example if baseball needed a batting cage a parent would just buy it for the program and skip the fundraiser altogether because people want to support a program not all the schools. I can confirm my contributions would go down if this is the policy.</p> <p>My other concern is that the district will start charging an admin fee to manage the funds. It happens everytime.</p> <p>Thank you</p>	<p>Andy High</p>
<p>Thank you for sharing this draft and for asking for community input. I want to be clear upfront — I'm not opposed to equity goals, and I understand why the district wants a consistent framework around fundraising. But as someone who helps run a booster organization, I have some real concerns about how this policy is written, and I think a few small changes could go a long way.</p> <p>The biggest issue for me is in Section 2, where it says donations shall be "accepted or allocated" to promote equitable access. What does "allocated" mean here? If it means the district could redirect funds that our volunteers and community members raised specifically for our theatre program — that's a problem. Donors give to STS because they want to support these kids and this program. The policy should clearly state that funds raised by independent nonprofits stay with the program they were raised for.</p>	<p>Clint Eichelberger</p>

Public Comment:	Submitted by:
<p>Sections 3 and 4 together create what I think is the most serious operational concern in this draft. Section 3 says the district will maintain processes for the "approval, tracking, reporting, and allocation" of funds raised on behalf of schools and programs. Section 4 says fundraising shall be subject to "standardized approval processes and guardrails." Both sections use the word "approval" — but neither one defines what that process looks like, how long it takes, what criteria will be used, or what happens when a request is denied. For a volunteer-run nonprofit, that kind of open-ended approval authority is a non-starter. We plan events months in advance. We have donor relationships, contracts with venues, and ticket sales to manage. The idea that we would need to ask the district for permission to hold a fundraiser — with no clear timeline, no defined standards, and no guarantee of a yes — puts everything we do at risk. If approval processes are going to apply to independent nonprofits, the policy needs to say so explicitly, define the criteria clearly, and guarantee a reasonable response window. Otherwise this language should be limited to funds that flow directly through the district.</p> <p>Section 5 requires that fundraising activities align with "district priorities and long-term planning." That's a broad standard, and it concerns me. Theatre, music, and other arts programs don't always show up at the top of district priority lists — but they matter enormously to the students involved. This language could give the district grounds to reject a fundraising event simply because it doesn't fit current strategic priorities. Fundraising by an independent nonprofit for a specific program should not require alignment with district-level planning goals.</p> <p>Section 1 talks about defining "baseline standards" for programs, which makes sense in theory. But until we know what that baseline looks like, booster organizations can't really plan. We'd like to see that baseline developed with community input and shared publicly before any follow-up regulations are written.</p> <p>We've worked hard to build something that genuinely helps students who might not otherwise have access to a quality theatre experience. We want to keep doing that, and we want to do it in a way that works with the district. We just need the policy to be clearer about what it does — and doesn't — allow.</p>	
<p>I'd like to begin by saying that I believe that equity-based goals are noble and that we all want to see our community's kids treated with fairness and being given the best possible chance at success. Any issues I have with this policy are not politically coded, but rather are based in practical concerns about what will bring about the best outcome.</p> <p>There are legitimate issues with the fundraising process as it stands, and I applaud the District's efforts to address them. Specifically, there appears to be frustration among corporate and larger-scale donors who are willing and able to help, but are inundated by</p>	<p>Jim Richards</p>

Public Comment:

Submitted by:

solicitations and unable to discern where the greatest need lies. This is problematic, and the District is right to get involved with getting this money to where it's most needed.

After attending a presentation, my understanding of the District's intention is to create an *optional* common fund into which any donor can contribute, and from which the District will allocate. Excellent idea, though prone to significant unintended consequences if implementation is not carefully crafted and managed.

Given that, I have substantial concerns about the policy as written, as it appears to put itself at odds with the solution as stated, inviting challenges (potentially legal ones) based on that mismatch, as well as opening the door to overreach, administrative bloat, and decreased total fundraising.

One specific concern is with this line: "fundraising systems should be designed to eliminate predictable disparities..." "Eliminate" is far too high a bar, unachievable outside of methods that would drastically reduce the total amount of money the district's programs would take in. I would suggest something closer to "reduce," "mitigate," -- essentially something more along the lines of what can realistically be accomplished via policy. I also think the word "predictable" is carrying a bit too much weight, as it implies we know more than we do, and is prone to misuse once hindsight comes into play.

Similarly, section 2 mandates that "acceptance or allocation of donations shall promote equitable student access..." This is an all-encompassing statement that far exceeds what I understood the District's intentions going forward to be. Even softening the language to "should promote" and/or eliminating "acceptance" allows for more flexibility in operational implementation.

Sections 3 and 4, and to a lesser-extent 5, also suffer from the same mismatch between stated intentions and global mandate. Subjecting any and all fundraising activities, including via independent nonprofits like ours, to an undefined "approval" process could severely dampen our program's ability to fundraise at all, and I suspect we're not alone in this.

Lastly, and with a realization that to a large extent this ship has sailed, I'd like to suggest just for consideration that I find policy-making based on equity to be fraught in some potentially non-obvious ways. Its goals are universal and praise-worthy. With this, I'm absolutely on board. Yet while equality, or equal access to opportunities, seems reasonably straightforward to mandate, equity requires at least two aspects that are extremely difficult to get right, and highly prone to downstream unforeseen consequences. 1) Deciding which lines ought to be drawn and criteria for inclusion into / exclusion from groups that merit advantage. 2) Evaluating success or failure based on equal



Policy and Regulation Public Comment Received by 5:00 p.m. April 3, 2026
 KMC-BP: Community-Funded Programs and Activities

Public Comment:	Submitted by:
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<p>outcomes, a vaguely defined and potentially unreachable goal itself, can lead to dangerous oversimplification and overreach. I hope that we're respecting the difficulty and complexity involved therein as we strive to support our kids.</p> <p>The language here it too vague to understand how this might impact the current fundraising efforts from the PTO of the school my students (Juniper ES) currently attend. A few points where we would like more clarity: "In alignment with the district's Equity Stance and Educational Equity policy (JBB-AP), fundraising systems should be designed to eliminate predictable disparities in the access, experiences, and outcomes students have across different schools and programs."</p> <p>What does this mean in practice. What are the predictable disparities. Does the equity policy mean that schools should receive the same funding through fundraising and if a school with wealthier families fundraises more, that money will be redistributed (I also think the district has confused equity with equality in the application of the equity policy and the term equity is used at times as a reason to not do hard things that would benefit all students).</p> <p>donations shall supplement, not supplant, district funding of core educational programs and services. The district shall define baseline standards for programs and facilities to promote equitable student opportunity.</p> <p>What are the baseline standards. I think this is potentially misguided as we receive requests for our PTO for things that we would think as basic such as books for kids and materials for special education classrooms. I support promoting equitable student opportunity but I want to see the district use policies and funding to actually achieve improved student learning.</p> <p>The district shall maintain clear and consistent processes for the approval, tracking, reporting, and allocation of funds raised on behalf of its schools and programs.</p> <p>Beware of secondary impacts here from creating a new administrative hurdle to communities supporting schools. If this becomes a burden, organizations and individuals will likely circumvent this. What is the goal go this approval and tracking system? If it is a concern about fairness, what is the problem we are trying to solve?</p> <p>Fundraising, sponsorships, advertising, naming opportunities, and public gifts shall be subject to standardized approval processes, defined roles and responsibilities, and established guardrails.</p>	<p>Steven Epstein</p>
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Policy and Regulation Public Comment Received by 5:00 p.m. April 3, 2026
KMC-BP: Community-Funded Programs and Activities

Public Comment:	Submitted by:
<p>What is the timeline for these processes. If we are raising money or schools as volunteers, are there going to be more hurdles which will disincentive us?</p> <p>Fundraising activities and acceptance of gifts shall align with district priorities and long-term planning, including consideration of ongoing operational obligations and lifecycle costs.</p> <p>Where can we access this information to know if we are aligned?</p>	



Administrative School District No. 1

Resolution No. 2013: Educational Technology

WHEREAS, Bend-La Pine Schools strives to provide a top tier education to prepare every student to be future ready with a passion, purpose and plan for a rapidly evolving world;

WHEREAS, Bend-La Pine Schools believes teachers are the experts in teaching our students, not educational technology companies, non-teacher led applications, or automated systems;

WHEREAS, Bend-La Pine Schools believes in using an evidence-based framework for all decisions around educational practice to ensure we use research proven strategies to help students reach their highest levels of achievement and well-being;

WHEREAS, Bend-La Pine Schools acknowledges screen use can support learning under specific circumstances, while also acknowledging ample research exists to show excessive screen time is associated with worsening executive function, academic performance, and health issues, including obesity, sleep disorders, depression, anxiety, attention disorders, vision issues, and back and neck issues;

WHEREAS, Bend-La Pine Schools is concerned with the unknown impacts of AI on education, human relationships, and brain development, and acknowledges the January 2026 Brookings Institute report on AI in education, which concluded the risks of using generative AI in education currently outweigh the benefits;

WHEREAS, Bend-La Pine Schools acknowledges educational technology can be transformative, while also acknowledging misuse of devices disrupts education and the classroom environment;

WHEREAS, Bend-La Pine Schools acknowledges technology plays an important role in assisting many students with special needs in accessing areas of education that might otherwise be inaccessible;

WHEREAS, Bend-La Pine Schools seeks to provide differentiated education for diverse learners with varied educational needs;

WHEREAS, Bend-La Pine Schools must be a responsible steward of our limited financial resources and is concerned regarding growing technology and digital curriculum costs;

NOW, THEREFORE BE IT RESOLVED THAT we, the Board of Directors for Bend-La Pine Schools direct the Superintendent to institute with fidelity and accountability and make public current policy, procedures and any documents that provide guidance to staff and students regarding technology use in the classroom;

RESOLVED FURTHER, the district shall engage in a review of all technology, websites and applications currently being used to ensure they are in compliance with EL 4.7 on Technology;

RESOLVED FURTHER, the district shall develop standards of use for educational technology at different grade bands: K-2, 3-5, 6-8, 9-12, including a list of educational technology applications approved for use at each grade band;

RESOLVED FURTHER, the district shall ensure screen use is limited to defined curricular and educational purposes only;

RESOLVED FURTHER, non-evidence-based technology and applications will be removed from student facing devices;

RESOLVED FURTHER, the district shall work to increase and promote reading and writing that is non-screen based to the greatest extent possible;

RESOLVED FURTHER, the district shall continue to study and use technology for adaptive purposes to best serve students with an identified need for which technology is appropriate and evidence-based to improve learning outcomes;

RESOLVED FURTHER, the district shall report to the board what systems currently exist to monitor screen time use;

RESOLVED FURTHER, the district shall report to the board the most commonly used applications and websites by students;

RESOLVED FURTHER, the district shall maximize use of JAMF, or similar technology, to ensure screen use is appropriate, teacher-led and for educational purposes only;

RESOLVED FURTHER, the district shall consider performance-based contracts with all educational technology vendors to force accountability for their efficacy of their products;

RESOLVED FURTHER, the district shall provide the board data on the costs of non-digital vs digital curriculum, the cost of hardware, software, and training for all technology implementations, and other associated costs of digital vs non-digital materials annually as part of the budget process.

Moved by _____

Second by _____

Yes votes _____ No votes _____

Dated this 14th day of April 2026.

Chair

Vice Chair

Attest: _____
Board Secretary

Resource list:

- 1) Burns, M., Winthrop, R., Luther, N., Venetis, E., & Karim, R. (2026, January 14). A new direction for students in an AI world: Prosper, prepare, protect. Brookings Institution <https://www.brookings.edu/articles/a-new-direction-for-students-in-an-ai-world-prosper-prepare-protect/>
- 2) Munzer, T., Parga-Belinkie, J., Milkovich, L. M., Tomopoulos, S., Ajumobi, T., Cross, C., Gerwin, R., Madigan, S., & Council on Communications and Media. (2026). Digital ecosystems, children, and adolescents: Policy statement. Pediatrics, 157(2), Article e2025075320. <https://doi.org/10.1542/peds.2025-075320>
- 3) Fesler, L., Martinez, J., Agnew, C., & Loeb, S. (2026). The evidence base on AI in K-12: A 2026 review. Stanford University, SCALE Initiative, AI Hub for Education. <https://scale.stanford.edu/sites/default/files/The%20Evidence%20Base%20on%20AI%20in%20K-12%20Report.pdf>
- 4) Vasconcellos, R. P., Sanders, T., Lonsdale, C., Parker, P., Conigrave, J., Tang, S., del Pozo Cruz, B., Biddle, S. J. H., Taylor, R., Innes-Hughes, C., Salmela-Aro, K., Vasconcellos, D., Wilhite, K., Tremaine, E., Booker, B., & Noetel, M. (2025). Electronic screen use and children's socioemotional problems: A systematic review and meta-analysis of longitudinal studies. Psychological Bulletin, 151(5), 513–543. <https://doi.org/10.1037/bul0000468> and <https://www.apa.org/pubs/journals/releases/bul-bul0000468.pdf>
- 5) Zablotsky, B., Ng, A. E., Black, L. I., Haile, G., Bose, J., Jones, J. R., & Blumberg, S. J. (2025). Associations between screen time use and health outcomes among US teenagers. Preventing Chronic Disease, 22, Article 240537. [doi.org](https://doi.org/10.1093/cdc/czab053) and https://www.cdc.gov/pcd/issues/2025/24_0537.htm
- 6) Boninger, F., & Nichols, T. P. (2025). Fit for purpose? How today's commercial digital platforms subvert key goals of public education. National Education Policy Center. https://nepc.colorado.edu/sites/default/files/publications/PB%20Boninger-Nichols_0.pdf
- 7) EverySchool (n.d.). EverySchool. www.everyschool.org



Housing Department
City of Bend
(541)
housing@bendoregon.gov
710 NW Wall Street, Bend OR 97703

This submittal form is to be completed as part of your application with the City of Bend. *Download this form before completing fillable fields*, then upload with your application through the Online Permit Center at www.bendoregon.gov/government/departments/economic-development/affordable-housing-program.

Qualified Rental Housing Tax Exemption Application

Project Description Questionnaire and Submittal Checklist

See page 3 for instructions on how to submit this form for review.

Property Address: 990 SW Yates Drive, Bend, OR 97702

Project Valuation: \$3,248,624 (SAV)

A. Statement of Project Charitable Purpose and Property Proportion:

1. Describe the project charitable purpose:

The purpose of this application is to request a 20-year extension of the property tax exemption for Mountain Laurel Lodge, to take effect upon the expiration of the current exemption in June 2027.

Mountain Laurel Lodge, which opened its doors in September 2006, was the City of Bend's FIRST RECIPIENT of property tax exemption through the City's Low-Income Housing Tax Credit Program. The project is a 100-unit, multi-family residential development.

2. Describe the proportion of the property, including number of units used for this charitable purpose:

One hundred percent (100%) of the units in the Mountain Laurel Lodge project are rent- and income-restricted.



Accommodation Information for People with Disabilities

To obtain this information in an alternate format such as Braille, large print, electronic formats, etc. please contact the Housing Department at Housing@bendoregon.gov or (541) 323-8550; Relay Users Dial 7-1-1.

B. Project Benefits to Resident:

1. Describe how tax exemptions will benefit the project residents:

The population served by Mountain Laurel Lodge subsists primarily on fixed incomes, such as Social Security and disability payments, which provide cost-of-living adjustments based on national formulas rather than local economic conditions. Bend's cost of living is significantly higher than the national average, with housing costs nearly 200 percent above the national average (U.S. News & World Report, 2026). In addition, Bend ranks sixth nationally for the fastest-increasing cost of living (U.S. Bureau of Economic Analysis, 2022). These conditions leave low-income seniors in Bend, whose

C. Description of future development (if applicable):

1. If the Property is being held for future development, provide a description of the plans for development of the property and how the property is being held for low-income housing development.

N/A - the project is currently developed and in use as low-income multifamily housing.

D. Describe how the corporation and the property meet the criteria provided in Bend Municipal Code 12.030.015 (link to code).

The Mountain Laurel Lodge project meets the criteria for exemption as allowed under ORS 307.515 to 307.537, and as described in Bend Municipal Code 12.025.015, as follows:

A. The property is an eligible property under 307.515 to 307.537 because:

- (1) The project is located within the City of Bend.
- (2) The project is a multifamily project containing 54 units, exceeding the minimum of three units.



Accommodation Information for People with Disabilities

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Submittal Items Checklist

- Funding Application**
A copy of the completed funding application for at least one secured funding source.
- Proof of Funding**
Proof of funding such as an award letter or grant contract.
- City of Bend Certification of income level** (this is a separate City document to upload)
- Title Report**
A copy of the property's title report or a collection of Legal Description, Proof of Ownership, and Lien Documentation.
- Project Description Questionnaire and Submittal Checklist** (This form)
- Pro Forma Income Statements** (may be one or two separate documents for both pro-formas)
Please show what the rent payments (per unit per month) would be required both with and without the tax exemption.

Instructions for Submitting for Review in Portal:

1. Download and complete applicable sections of this document and have all applicable documentation from the checklist above compiled and ready to upload.
2. Open your CityView Portal account: <https://cityview.ci.bend.or.us/Portal/>
3. Click "Apply" under the "Engineering, Agreements & Affordable Housing" section
4. For the "Application Type" select "Tax Exemption"
5. Complete other applicable sections then choose "Next Step: Permit Type"
6. On next screen, check box "Non-Profit TaxExemption"
7. Click "Next Step: Work Items"
8. Complete next steps until you get to Step 7 "Upload Files"
9. Upload completed form into the "Project Description Questionnaire" section
10. Upload remaining items compiled from the checklist



Accommodation Information for People with Disabilities

To obtain this information in an alternate format such as Braille, large print, electronic formats, etc. please contact the Housing Department at Housing@bendoregon.gov or (541) 323-8550; Relay Users Dial 7-1-1.

Mountain Laurel Lodge			
2026 Budget (draft)		No Tax Exemption	
Income	Total	Unit	%
Rental Income	\$423,874	\$7,850	65.2%
Voucher Income	\$219,056	\$4,057	33.7%
Other Income	\$7,468	\$138	1.1%
Gross Income	\$650,398	\$12,044	100.0%
Vacancy	(\$13,008)	(\$241)	-2.0%
Effective Gross Income (EGI)	\$637,390	\$11,804	98.0%
Expenses	Total	Unit	%
Administrative	\$22,065	\$409	3.4%
Payroll & Taxes	\$62,075	\$1,150	9.5%
Legal & Professional	\$10,000	\$185	1.5%
Utilities	\$48,602	\$900	7.5%
Maintenance & Operating Expenses	\$112,418	\$2,082	17.3%
Insurance	\$25,775	\$477	4.0%
Management Fee	\$41,413	\$767	6.4%
Property Tax	\$24,500	\$454	3.8%
Total Operating Expenses	\$346,848	\$6,423	53.3%
Net Operating Income	\$290,542	\$5,380	44.7%
Capital Reserves	\$15,623	\$289	2.4%
Partnership Management Fee	\$10,416	\$193	1.6%
Debt Service - Perm (NOAH)	\$117,882	\$2,183	18.1%
Debt Service - HOME	\$44,873	\$831	6.9%
Debt Service - Weatherization	\$1,206	\$22	0.2%
Interest - Other	\$4,181	\$77	0.6%
w/d from Replacement Reserves	(\$10,900)	(\$202)	-1.7%
Cash Flow	\$107,261	\$1,986	16.5%

Mountain Laurel Lodge			
2026 Budget (draft)		Full Tax Exemption	
Income	Total	Unit	%
Rental Income	\$399,374	\$7,396	63.8%
Voucher Income	\$219,056	\$4,057	35.0%
Other Income	\$7,468	\$138	1.2%
Gross Income	\$625,898	\$11,591	100.0%
Vacancy	(\$12,369)	(\$229)	-2.0%
Effective Gross Income (EGI)	\$613,529	\$11,362	98.0%
Expenses	Total	Unit	%
Administrative	\$22,065	\$409	3.5%
Payroll & Taxes	\$62,075	\$1,150	9.9%
Legal & Professional	\$10,000	\$185	1.6%
Utilities	\$48,602	\$900	7.8%
Maintenance & Operating Expenses	\$112,418	\$2,082	18.0%
Insurance	\$25,775	\$477	4.1%
Management Fee	\$41,413	\$767	6.6%
Property Tax	\$0	\$0	0.0%
Total Operating Expenses	\$322,348	\$5,969	51.5%
Net Operating Income	\$291,181	\$5,392	46.5%
Capital Reserves	\$15,623	\$289	2.5%
Partnership Management Fee	\$10,416	\$193	1.7%
Debt Service - Perm (NOAH)	\$117,882	\$2,183	18.8%
Debt Service - HOME	\$44,873	\$831	7.2%
Debt Service - Weatherization	\$1,206	\$22	0.2%
Interest - Other	\$4,181	\$77	0.7%
w/d from Replacement Reserves	(\$10,900)	(\$202)	-1.7%
Cash Flow	\$107,900	\$1,998	17.2%

Tax Exemption Pass Through Verification	Project	Per Unit	
	Annually	Annually	Monthly
Tax Savings	\$24,500	\$454	\$38
Rental Income Reduction	\$24,500	\$454	\$38
Difference	\$0	\$0	\$0

With full tax exemption, per unit per month rents range from \$482 to \$1207, depending on unit size and income level.

Without tax exemption, per unit per month rents would range from \$520 to \$1245, depending on unit size and income level.

Please note: all figures are based on the draft budget for Mountain Laurel Lodge for 2026. The 2026 budget has not yet been finalized.

City of Bend

**Property Tax Exemption Program for
Qualified Rental Housing**

Certification of Income Levels

The undersigned certifies, to the best of his or her knowledge and belief, that:

- (1) The property for which tax exemption is requested is offered for rent, or is held for the purpose of developing low income rental housing.
- (2) If occupied, the income levels of all occupants of the property for which tax exemption is being requested, at the time of this application or within 30 days of the filing of this application, are at or below 60 percent of the area median income as determined by the State Housing Council based on information from the United States Department of Housing and Urban Development.
- (3) The required rent payments reflect the full value of the property tax exemption for the duration of the tax exemption period.
- (4) Each year for the duration of the tax exemption period, the undersigned shall supply the City of Bend with a copy of the Certificate of Compliance from each state and/or federal affordable housing funding source listed in this application. Certificates of Compliance must be received by the City within 45 days from the date they are issued by the state or federal agency.


Signed _____

MOUNTAIN LAUREL LODGE, LP.
Organization/Company

ON BEHALF OF G.P.
Title

1/14/26
Date

EXHIBIT "A"
LEGAL DESCRIPTION

Parcel 1 of Partition Plat No. 2005-37, filed May 25, 2005, a portion of Lot 4 in Century Washington Center, Phase I, II, III and IV, and located in Section 6, Township 18 South, Range 12 East of the Willamette Meridian, City of Bend, Deschutes County, Oregon



15 Oregon Ave., Bend, OR 97703
Phone (541) 389-7711 Fax (541) 389-0506

PRELIMINARY TITLE REPORT ATTACHED

To: WFG National Title Insurance Company
700 NE Multnomah St., Ste. 190
Portland, OR 97232
Attn: Team Trevor

Date: October 1, 2025
Order No. 1029023
Reference: 990 SW Yates Dr.
Bend, OR 97702

Your File No.: 25-203982

We have enclosed our Preliminary Title Report pertaining to order number 1029023.

Thank you for the opportunity to serve you. Your business is appreciated!

If you have any questions or need further assistance, please do not hesitate to contact your Title Officer listed below.

Sincerely,

Tonya Vejar

tonya.vejar@amerititle.com

NOTICE: Please be aware that, due to the conflict between federal and state laws concerning the legality of the cultivation, distribution, manufacture or sale of marijuana, the Company is not able to close or insure any transaction involving land that is associated with these activities.



15 Oregon Ave., Bend, OR 97703
Phone (541) 389-7711, Fax (541) 389-0506

October 1, 2025

File Number: 1029023

Client's File Number : 25-203982

Report No.: 1

Title Officer: Tonya Vejar tonya.vejar@amerititle.com

PRELIMINARY TITLE REPORT

Property

Address: 990 SW Yates Dr., Bend, OR 97702

Policy or Policies to be issued:

Liability

Premium

Proposed Insured: Catalina Housing, LLC

2021 ALTA Standard Owner's Policy COMMERCIAL

\$4,700,000.00

\$7,650.00

Endorsements: TBD

Proposed Insured: TBD

2021 ALTA Lender's Policy

(X) EXTENDED () STANDARD (Simultaneous)

TBD

TBD

Endorsements: TBD

Local Government Lien Search

\$30.00

We are prepared to issue ALTA (07/01/21) title insurance policy(ies) of Stewart Title Guaranty Company, in the usual form insuring the title to the land described as follows:

Legal description attached hereto and made a part hereof marked Exhibit "A"

and dated as of 17th day of September, 2025 at 7:30 a.m., title is vested in:

[Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership](#)

The estate or interest in the land described or referred to in this Preliminary Title Report and covered herein is:

FEE SIMPLE

Except for the items properly cleared through closing, Schedule B of the proposed policy or policies will not insure against loss or damage which may arise by reason of the following:

GENERAL EXCEPTIONS:

1. Taxes or assessments which are not shown as existing liens by the records of any taxing authority that levies taxes or assessments on real property or by the Public Records; proceedings by a public agency which may result in taxes or assessments, or notices of such proceedings, whether or not shown by the records of such agency or by the Public Records.
2. Facts, rights, interests or claims which are not shown by the Public Records but which could be ascertained by an inspection of the Land or by making inquiry of persons in possession thereof.
3. Easements, or claims of easement, not shown by the Public Records; reservations or exceptions in patents or in Acts authorizing the issuance thereof; water rights, claims or title to water.
4. Any encroachment (of existing improvements located on the subject Land onto adjoining Land or of existing improvements located on adjoining Land onto the subject Land) encumbrance, violation, variation, or adverse circumstance affecting the Title that would be disclosed by an accurate and complete land survey of the subject Land.
5. Any lien, or right to a lien, for services, labor, material, equipment rental, or workers compensation heretofore or hereafter furnished, imposed by law and not shown by the Public Records.

EXCEPTIONS 1 THROUGH 5 ABOVE APPLY TO STANDARD COVERAGE POLICIES AND MAY BE MODIFIED OR ELIMINATED ON AN EXTENDED COVERAGE POLICY.

SPECIAL EXCEPTIONS:

6. The 2025-2026 Taxes: A lien not yet due or payable.
7. Taxes assessed under Code No. 1001 [Account](#) No. 198543 [Map](#) No. 181206C000900, including the current fiscal year, not assessed because of Municipal or Other Exempt Exemption. If the exempt status is terminated an additional tax may be levied.
8. City liens, if any, of the City of Bend.

None as of the effective date herein.
9. Regulations, including levies, assessments, water and irrigation rights and easements for ditches and canals of Central Oregon Irrigation District.
(No inquiry has been made. If a search is requested, a charge of \$30.00 per account will be added)
10. Excavation and removal of vegetation shall be prohibited on natural slopes in excess of 12% until the applicable lot development has been approved by the City of Bend, as shown on the official [plat](#) of said land.
11. No vehicle access strip abutting Mt. Washington Drive as shown on the official [plat](#) of said land.
12. All lots are subject to the City of Bend Solar Ordinance as shown on the official [plat](#) of said land.

13. Covenants, conditions and restrictions, but omitting any covenant or restriction based on race, color, religion, sex, sexual orientation, disability, handicap, familial status, marital status, ancestry, national origin or source of income, as set forth in applicable state or federal laws, except to the extent that said covenant or restriction is permitted by applicable law.

Recorded: December 27, 1999

Instrument No.: [1999-61163](#)

Said Covenants, Conditions and Restrictions set forth above contain, among other things, levies and assessments of Century Washington Center Owners' Association.

Amended by instrument,

Recorded: September 23, 2022

Instrument No.: [2022-35440](#)

14. Easement (Reservation for Cross Access and Drainage), including the terms and provisions thereof,

Recorded: May 5, 2005

Instrument No.: [2005-27752](#)

Easement Amendment, including the terms and provisions thereof,

Recorded: March 14, 2007

Instrument No.: [2007-15348](#)

15. Reciprocal Access Easement and Public Sidewalk Easement as shown on the [Partition Plat No. 2005-37](#).

16. A Deed of Trust (Housing Trust Fund Program), including the terms and provisions thereof, to secure the amount noted below and other amounts secured thereunder, if any:

Amount: \$100,000.00

Trustor/Grantor: Mountain Laurel Lodge Limited Partnership

Trustee: First American Title

Beneficiary: State of Oregon, by and through its Housing and Community Services Department

Dated: February 17, 2005

Recorded: June 9, 2005

Instrument No.: [2005-36154](#)

17. A Deed of Trust, Line of Credit Deed of Trust, Assignment of Rents, Security Agreement and Fixture Filing, including the terms and provisions thereof, to secure the amount noted below and other amounts secured thereunder, if any:

Amount: \$500,000.00

Trustor/Grantor: Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership

Trustee: First American Title Insurance Company

Beneficiary: State of Oregon, by and through its Housing and Community Services Department

Dated: May 31, 2005

Recorded: June 9, 2005

Instrument No.: [2005-36155](#)

This Deed of Trust secures an equity line of credit and/or revolving loan. The Company requires satisfactory written statement from the existing lender confirming; (a) the payoff amount, (b) that the line of credit has been closed, and no further draws/advances will be permitted and/or the right to future advances has been terminated, and (c) agreeing to deliver a full satisfaction/release upon payment of the outstanding balance, (d) satisfactory documentation from the borrower to close the account.

18. Regulatory Agreement, Declaration of Restrictive Covenants and Equitable Servitudes, including the terms and provisions thereof,
Recorded: June 9, 2005
Instrument No.: [2005-36156](#)
Between: Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership
And: State of Oregon, by and through its Housing and Community Services Department
19. A Deed of Trust, including the terms and provisions thereof, to secure the amount noted below and other amounts secured thereunder, if any:
Amount: \$500,000.00
Trustor/Grantor: Mountain Laurel Lodge Limited Partnership
Trustee: First American Title Insurance Company of Oregon
Beneficiary: Pacific Crest Affordable Housing LLC
Dated: May 30, 2005
Recorded: June 9, 2005
Instrument No.: [2005-36160](#)
20. License, including the terms and provisions thereof,
Recorded: July 19, 2005
Instrument No.: [2005-46093](#)
21. Water Easement, including the terms and provisions thereof,
Recorded: July 19, 2005
Instrument No.: [2005-46094](#)
22. Easement (Signage for Parcel 1 on Parcel 2), including the terms and provisions thereof,
Recorded: March 14, 2007
Instrument No.: [2007-15347](#)
Between: Yates Drive Partners, LLC, an Oregon limited liability company
And: Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership
23. 9% Low-Income Housing Tax Credit Declaration of Land Use Restrictive Covenants, including the terms and provisions thereof,
Recorded: June 18, 2007
Instrument No.: [2007-34256](#)
Between: Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership
And: Oregon Housing and Community Services, a governmental agency of the State of Oregon
24. A Deed of Trust (Low Income Weatherization Program), including the terms and provisions thereof, to secure the amount noted below and other amounts secured thereunder, if any:
Amount: \$44,365.00
Trustor/Grantor: Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership
Trustee: First American Title Insurance Company of Oregon
Beneficiary: State of Oregon, by and through its Housing and Community Services Department
Dated: May 23, 2007
Recorded: June 27, 2007
Instrument No.: [2007-36080](#)

25. Loan and Project Use Agreement, Declaration of Restrictive Covenants and Equitable Servitude- Low Income Weatherization Grant Program, including the terms and provisions thereof,
Recorded: June 27, 2007
Instrument No.: [2007-36081](#)
Between: Pacific Crest Affordable Housing LLC
And: Mountain Laurel Lodge Limited Partnership, and State of Oregon, by and through its Housing and Community Services Department
26. Oregon Affordable Housing Tax Credit Program Declaration of Land Use Restrictive Covenants, including the terms and provisions thereof,
Recorded: September 27, 2007
Instrument No.: [2007-52340](#)
Between: Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership
And: Oregon Housing and Community Services Department, a governmental agency of the State of Oregon
27. Housing Development Grant Program-Project Use Loan Agreement, including the terms and provisions thereof,
Recorded: December 19, 2007
Instrument No.: [2007-64845](#)
Between: Mountain Laurel Lodge Limited Partnership
And: Oregon Housing and Community Services
28. Rights of tenants, as tenants only, under unrecorded leases or tenancies.
29. Personal property taxes, if any.
30. Discrepancies, conflicts in boundary lines, shortage in area, encroachments or any other facts, which a correct survey would disclose.
31. Any lien, or right to a lien, for services, labor, material, equipment rental, or workers compensation heretofore or hereafter furnished, imposed by law and not shown by the Public Records.

To remove this item, the Company will require an affidavit and indemnity on a form supplied by the Company.

IF THE ABOVE EXCEPTION IS TO BE REMOVED FROM A FORTHCOMING POLICY PRIOR TO THE EXPIRATION OF THE STATUTORY LIEN PERIOD, THE COMPANY MUST BE CONTACTED REGARDING ITS UNDERWRITING REQUIREMENTS FOR EARLY ISSUE.

32. Persons in possession or claiming the right of possession.

To remove this item, the Company will require an affidavit and indemnity on a form supplied by the Company.

33. The Company will require a copy of the Operating Agreement (including any approvals of withdrawal of member(s) or acceptance of new member(s)) and the Articles of Organization of Catalina Housing, LLC for its examination prior to closing. Any conveyance or encumbrance of the Limited Liability Company's property must be executed by all of the members unless otherwise provided for in the Operating Agreement.

The Company reserves the right to add additional items or make further requirements after review of the requested documentation.

34. The Company will require the following documents for review prior to the issuance of any title assurance predicated upon a conveyance or encumbrance from the limited partnership named below:

Name: Mountain Laurel Lodge Limited Partnership, an Oregon limited partnership

- (a) A complete copy of the limited partnership agreement and any amendments or restatements thereto
- (b) Evidence that the partnership was validly formed and in good standing
- (c) If less than all general partners are executing documents, furnish evidence of the signing partner(s) authority, unless authorized in the above-referenced documents.

The Company reserves the right to add additional items or make further requirements after review of the requested documentation.

INFORMATIONAL NOTES:

- A. This report does not include a search for financing statements filed in the office of the Secretary of State in this or any other State, or in a county other than the county wherein the Land is situated, and no liability is assumed if a financing statement is filed in the office of the County Clerk (Recorder) covering fixtures on the Land wherein the Land is described other than by metes and bounds or under the rectangular survey system by recorded lot and block.
- B. This transaction and the policy or policies and the endorsements contemplated in connection with this Commitment are subject to review and approval of the Company's Insuring Underwriter. The Company reserves the right to add additional exceptions or notes and to make further requirements after such review.
- C. Any map or sketch enclosed as an attachment herewith is furnished for information purposes only to assist in property location with reference to streets and other parcels. No representation is made as to accuracy and the company assumes no liability for any loss occurring by reason of reliance thereon.
- D. Your application for title insurance was placed by reference to only a street address or tax identification number. Based on our records, we believe that the legal description in this report covers the parcel(s) of Land that you requested. If the legal description is incorrect, the parties to the transaction must notify the Company and/or the settlement company in order to prevent errors and to be certain that the correct parcel(s) of Land will appear on any documents to be recorded in connection with this transaction and on the policy of title insurance.
- E. Due to current conflicts or potential conflicts between state and federal law, which conflicts may extend to local law, regarding marijuana, if the transaction to be insured involves property which is currently used or is to be used in connection with a marijuana enterprise, including but not limited to the cultivation, storage, distribution, transport, manufacture, or sale of marijuana and/or products containing marijuana, the Company declines to close or insure the transaction, and this Preliminary Title Report shall automatically be considered null and void and of no force and effect.
- F. In the event that the contemplated transaction for which a Real Estate Report is required to be submitted to the US Department of Treasury Financial Crimes Enforcement Network ("FinCEN Report"), then the parties to transaction (Seller(s) and Buyer(s)) shall no later than the closing, provide to the Company the information and documentation necessary to enable the Company to complete the FinCEN Report. Such information and documentation include full legal name, date of birth, residential address, and the IRS taxpayer identification number of the beneficial owners of the Buyer(s), as further defined and described in Section 1031.320 of Chapter 31 of the Code of Federal Regulations ("Code")

NOTE: The FinCEN Report requires certain residential real estate transaction purchased with all cash or without institutional lender financing, where at least one buyer/transferee is a legal entity to be reported to the United States Treasury Department's Financial Crimes Enforcement Network. If the required information is not timely provided to the Company, the Company may elect to withdraw as the settlement company or otherwise be involved in the transaction.

If **AmeriTitle, LLC** is not acting as a "Reporting Person" under the FinCEN rule for this transaction, where said company is not performing any escrow or settlement functions, responsibility for compliance with FinCEN reporting requirements lies with the party designated as the Reporting Person under the rule, which may include the settlement agent, escrow agent, or other party facilitating the closing.

AmeriTitle, LLC expressly disclaims any and all liability for FinCEN reporting obligations where said company is not performing any escrow or settlement functions

THIS PRELIMINARY TITLE REPORT IS NOT AN ABSTRACT OF TITLE, REPORT OF THE CONDITION OF TITLE, LEGAL OPINION, OPINION OF TITLE, OR OTHER REPRESENTATION OF THE STATUS OF TITLE. THE PROCEDURES USED BY THE COMPANY TO DETERMINE INSURABILITY OF THE TITLE, INCLUDING ANY SEARCH AND EXAMINATION, ARE PROPRIETARY TO THE COMPANY, WERE PERFORMED SOLELY FOR THE BENEFIT OF THE COMPANY, AND CREATE NO EXTRACONTRACTUAL LIABILITY TO ANY PERSON, INCLUDING A PROPOSED INSURED.

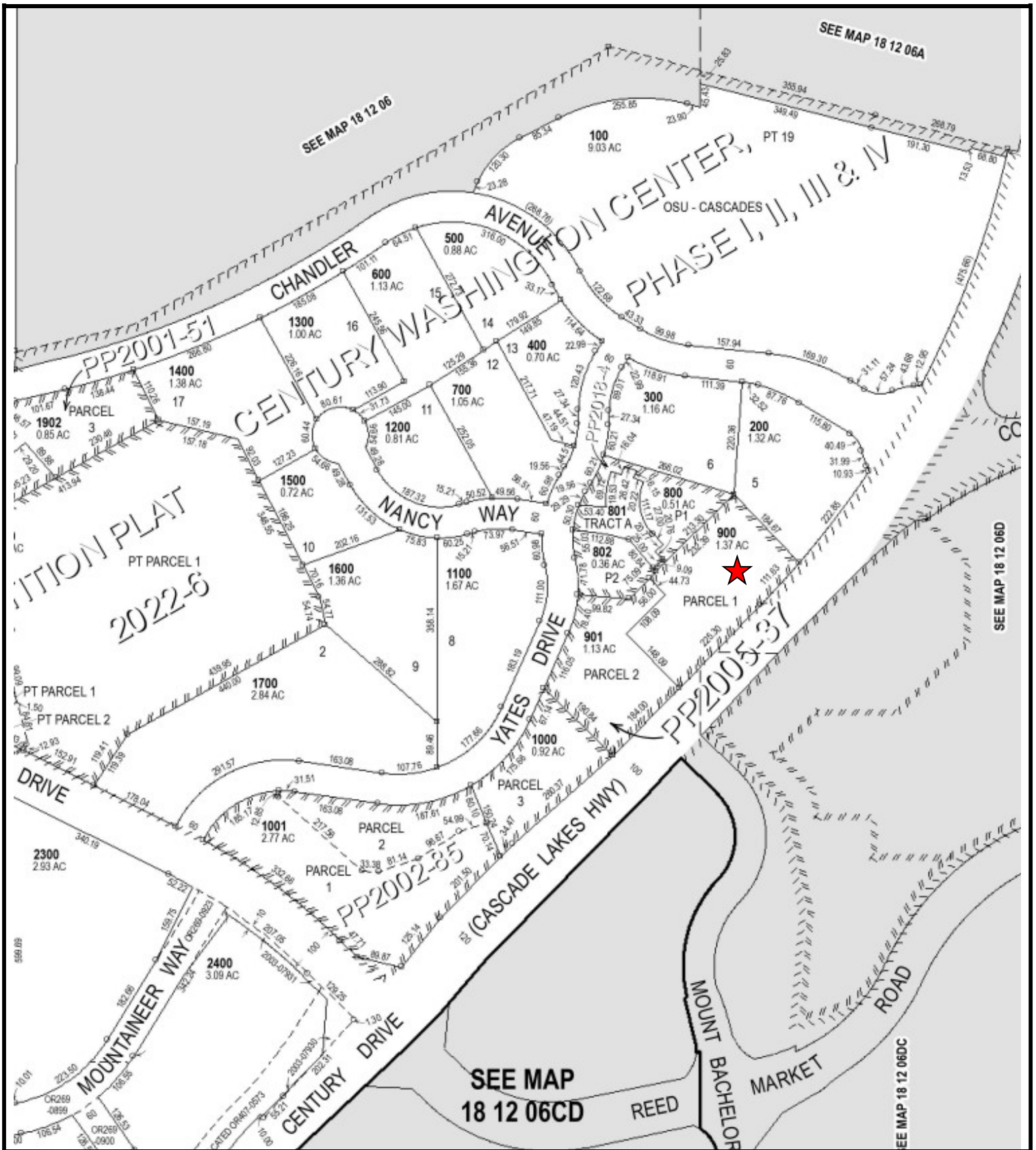
This report is preliminary to the issuance of a policy of title insurance and shall become null and void unless a policy is issued and the full premium paid.

End of Report

"Superior Service with Commitment and Respect for Customers and Employees"

EXHIBIT "A"
LEGAL DESCRIPTION

Parcel 1 of Partition Plat No. 2005-37, filed May 25, 2005, a portion of Lot 4 in Century Washington Center, Phase I, II, III and IV, and located in Section 6, Township 18 South, Range 12 East of the Willamette Meridian, City of Bend, Deschutes County, Oregon



181206C000900
Bend, OR 97702

THIS MAP IS FURNISHED AS AN ACCOMMODATION STRICTLY FOR THE PURPOSES OF GENERALLY LOCATING THE LAND. IT DOES NOT REPRESENT A SURVEY OF THE LAND OR IMPLY ANY REPRESENTATIONS AS TO THE SIZE, AREA OR ANY OTHER FACTS RELATED TO THE LAND SHOWN THEREOF

Section 02

DATA SUMMARY

DATA SUMMARY

APPLICANT INFORMATION

Project Name: Mountain Laurel Lodge

Project Address: 990 SW Yates Drive Bend 97701 Deschutes
Street City Zip Code County

Legislative Districts: 2 U.S. House 27 State Senate 54 State House

* To find the project's district numbers (some have changed recently) visit <http://www.leg.state.or.us/findlegsltr/findset.htm>

APPLICANT

CO-APPLICANT

Name: Acadia Properties, LLC
Contact: John Gilbert & Rob Roy
Street: 543 NW Broadway Street
City/St/Zip: Bend, Oregon 97701
Phone: 541-383-2505
Fax: 541-383-3618
E-Mail: jgilbert@acadia-properties.com
Tax I.D. #: 089-50-1403

Name: _____
Contact: _____
Street: _____
City/St/Zip: _____
Phone: _____
Fax: _____
E-Mail: _____
Tax I.D. #: _____

Applicant Type ("X"box)

Co-Applicant Type ("X"box)

For Profit Housing Authority
Not-for-Profit CHDO
Local Government

For Profit Housing Authority
Not-for-Profit CHDO
Local Government

OWNERSHIP ENTITY (LP, LLC, etc.)

CONSULTANT (if applicable)

Name: Mountain Laurel Lodge LP (to-be-formed)
Contact: John Gilbert & Rob Roy
Street: 543 NW Broadway Street
City/St/Zip: Bend, Oregon 97701
Phone: 541-383-2505
Fax: 541-383-3618
E-Mail: jgilbert@acadia-properties.com
Ownership Tax ID #: Not yet assigned

Name: _____
Contact: _____
Street: _____
City/St/Zip: _____
Phone: _____
Fax: _____
E-Mail: _____

All Correspondence Should Be Directed to:

Contact: John N. Gilbert, III Title: Principal
 Name: Acadia Properties, LLC Phone: 541-383-2505
 Address: 1293 NW Wall Street #107 Fax: 541-383-3618
 City/St/Zip: Bend, Oregon 97701 E-Mail: jgilbert@acadia-properties.com

Indicate to which entity funds should be disbursed: To be formed.

NONPROFIT INFORMATION

(If Applicable)

Source of your exemption ("X" box)

IRC Section 501(a) IRC Section 501(c)(3)
 IRC Section 501(c)(4) ORS 456

Date incorporated: _____ Date IRS 501(c)(3) received: _____
 Date Articles of Incorporation & By-laws filed: _____ Date Articles or By-laws amended: _____
 Date Purpose/Mission statement: _____ Date Purpose/Mission statement amended: _____

Do the By-laws set forth the development of affordable housing as a purpose?

Yes (X)	No (X)
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 Is the project a for-profit / not-for-profit joint venture?

Yes (X)	No (X)
---------	--------

DEVELOPMENT TEAM INFORMATION

(Provide the following information, as it applies to the project.)

Contractor: R&H Construction (not finalized) Ph: 541-312-2961 Email: jmontgomery@rhconst.com
 Architect: Steele & Associates Ph: 541-382-9867 Email: ssteele@steele-arch.com
 Tax Atty: Holland & Knight, LLP Ph: 503-243-5866 Email: Paul.dagle@hklaw.com
 Tax Acct: Blume Loveridge Ph: 425-453-2088 Email: jfleming@blcpa.com
 Syndicator: Homestead Capital Ph: 503-276-1555 Email: sa@homesteadcap.com
 Property Mgr: Cascade Management Ph: 503-684-7888 Email: dave@cascade-management.com

OHCS-BASED FUNDING REQUESTS

<u>Source of Funds</u>	<u>\$ Amount</u>	<u>Source of Funds</u>	<u>\$ Amount</u>
Trust Fund	<u>100,000</u>	Elderly/Disabled	_____
HOME	<u>500,000</u>	Risk Sharing	_____
LIHTC (annual allocation)	<u>689,500</u>	Loan Guarantee	_____
HELP	_____	Lease Guarantee	_____
OAHTC (32% of loan amt)	<u>540,000</u>	Seed Money	_____
Weatherization (Wx)	<u>44,365</u>	Predevelopment	_____
ADF	_____	Oregon Rural Rehab	_____
Other?	_____	Conduit	_____
	_____	MAP	_____

PROJECT INFORMATION

Target Population: Elderly (55+)

Number of Years of Affordability: 60

PROJECT TYPE ("X" all boxes which apply)

<input checked="" type="checkbox"/>	New Construction	<input checked="" type="checkbox"/>	Multi-Family Rental Housing	<input checked="" type="checkbox"/>	Elderly/Disabled
<input type="checkbox"/>	Acquisition	<input type="checkbox"/>	Single-Family Housing	<input checked="" type="checkbox"/>	Independent Living
<input type="checkbox"/>	Rehabilitation	<input type="checkbox"/>	Homeless Shelter	<input type="checkbox"/>	Congregate Care
<input type="checkbox"/>	Vacant	<input type="checkbox"/>	Transitional Housing	<input type="checkbox"/>	Assisted Living Facility
<input type="checkbox"/>	Occupied	<input type="checkbox"/>	Group Home	<input type="checkbox"/>	SRO

_____ If rehabilitation, year built

UNIT TYPE

In the table below, list the unit type (SRO, studio, one bedroom, ...), the total number of each unit type, number of the units designated as HOME, LIHTC, Trust Fund, HELP, etc., units, square footage of units *and total square footage for each unit type*. The number of various Program units may exceed the Total Number of Units. For the unit square footage, the inside wall measurement should be used.

Residential only										
Unit Type (SRO, 1 bdr, 2 bdr, 3 bdr, etc.)	Total No. of Units	NUMBER OF UNITS DESIGNATED AS						Actual Square Footage of Unit	Total Square Footage	
		OHCS HOME	LIHTC	Trust Fund	HELP	ADF	WX			
<i>* Note: Manager unit(s) must be included in this table.</i>										
1 bdr	42	7	42	1			42	692	29,081	
2 bdr	12	2	12	1			12	970	11,641	
Total (by column) ▶	54	9 (Includes 5-Home + 4 Home-Like)	54	2			54		40,722	
Common Areas ▶									15,654	
Comm'l Areas ▶									0	
Tuck-Under Parking ▶									18,765	
							TOTAL FLOOR AREA ▶		75,141	

If there is a Manager unit, what is its size? (1 bdrm, 2 bdrm, etc.) 2 bed
 If the manager unit is income-qualified, what is the AMI %? <=60

Common property management?

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PROJECT RENTS AND INCOME LEVELS

Legislation requires that when OHCS resources are utilized, OHCS will give substantial preference to applicants who rent to tenants whose net income is at 2 times or greater, the rent. (e.g. if rent is \$300 per month, a tenant who earns a net of \$600 should be considered income eligible.) Will the project accept this as its policy?

Yes (X)	No (X)
X	

Upon completion of the project, how many units will be receiving project based assistance? 0

Number of RD units receiving project-based assistance? _____

Number of Section 8 units project-based assistance? _____

Number of units receiving other type of project-based assistance? _____

Explain other type assistance _____

In the table below, indicate the income and rental limitations of the proposed units. Assume all funding source restrictions when completing. Round up to the nearest 10%, i.e., a 47% rental charge would be listed as 50%.

Unit Type by bedroom size:	Number of units by bedroom size:	Percent of Median Income as adjusted for family size will not exceed:	Rents not to exceed the following percent of median income:
<i>Example:</i>	<i>Example:</i>	<i>Example:</i>	<i>Example:</i>
2 bedroom	8	50%	50%
3 bedroom	12	60%	60%
1 Bedroom	7	50%	50%
1 Bedroom	35	60%	60%
2 Bedroom	1	50%	50%
2 Bedroom	11	60%	60%

If the income limitation percentage of the household residing in the unit is not equal to the proposed rental percentage charge, then provide an explanation why. (For instance, if the rent limitation is 40% of area median income and the household income will be 30% or less of area median income (indicate the reasoning behind the choices).

X _____

Name, title and address of the Chief Executive Officer (i.e., Mayor, City Manager) of the project's locality:

Name: Ron Garzini **Title:** Interim City Manager
Address: 710 NW Wall St. PO Box 431 **City:** Bend, Oregon **Zip:** 97709

PROPOSED PROJECT SCHEDULEProject Name: Mountain Laurel Lodge Schedule date: 8/5/04

ACTIVITY	PROPOSED DATE (month/year) *	REVISED DATE (month/year) *	COMPLETED DATE (month/year) *
SITE			
Option/Contract executed			January 2004
Site Acquisition	March 2005		
Zoning Approval			October 2003
Site Analysis	December 2004		
Building Permits & Fees	May 2005		
Off-Site Improvements	June 2005		
PRE-DEVELOPMENT			
Plans Completed	February 2005		
Final Bids	March 2005		
Contractor Selected	December 2004		
FINANCING			
CONSTRUCTION LOAN:			
Proposal	January 2005		
Firm Commitment	March 2005		
PERMANENT LOAN:			
Proposal	November 2004		
Firm Commitment	November 2004		
SYNDICATION AGREEMENT (LIHTC)	March 2005		
CONSTRUCTION BEGINS	June 2005		
CONSTRUCTION COMPLETED	June 2006		
CERTIFICATE OF OCCUPANCY	July 2006		
LEASE UP COMPLETED	December 2006		

* Indicates completion by end of month



Oregon

Theodore R. Kulongoski, Governor

Housing and Community Services

Street Address: 725 Summer Street NE, Suite B

Mailing Address: PO Box 14508

Salem, OR 97301-1271

(503) 986-2000

FAX (503) 986-2020

TTY (503) 986-2100

www.hcs.state.or.us



Setting the Standard...



November 8, 2004

Mr. John Gilbert
Acadia Properties, LLC
543 NW Broadway Street
Bend, Oregon 97701

RE: **CONSOLIDATED FUNDING RESERVATIONS
MOUNTAIN LAUREL LODGE, Project Number 00000489**

Dear Mr. Gilbert:

Oregon Housing and Community Services ("OHCS," "Department") has reserved the following funding for Acadia Properties LLC for the development of the Mountain Laurel Lodge project.

- \$ 100,000 Housing Development Grant (Trust Fund);
- \$ 689,500 annual allocation of 2005 Low Income Housing Tax Credits;
- \$ 540,000 of Oregon Affordable Housing Tax Credits;
- \$ 500,000 HOME Investment Partnerships Program Grant (HOME);
- \$ 44,365 Low-Income Weatherization Program.

Please be advised that readiness to proceed is an important criterion. In order to retain these reservations, you must meet the following conditions, subject to Department approval, by **February 10, 2005**. Failure to meet all conditions to OHCS satisfaction may result in the revocation of the reservations.

No funds will be released until the general conditions are met unless pre-approved by OHCS and only for predevelopment activities as indicated under the Housing Development Grant Program.

Note: As an applicant for state resources through the Consolidated Funding Cycle, you are subject to applicable state laws and rules. Please be informed that the Bureau of Labor and Industry BOLI is in the process of revising, or has revised, OAR 839-016-0100 which interprets the Prevailing Wage Law. The Prevailing Wage Law essentially requires that the prevailing wage rate be paid to workers on public works if public funds are used. Please make sure you stay current on the status of this and other rules as they may have a financial impact on your project, including the receipt of funding conditionally reserved for your project through the Consolidated Funding Cycle. For more information on OAR 839-016-0100 you may contact BOLI at (503) 731-4200.

Note: Many of our programs require specific documents to be completed either now or at a later time during project development. Documents necessary for satisfaction of Conditions of Reservation can be found on our website at:
http://www.ohcs.oregon.gov/OHCS/HRS_Reservation_Letter_Attach.shtml under the link entitled "Reservation Letter Attachments." If you do not have internet access, please contact me and I will be glad to send them in hard copy form.

General Conditions (all must be completed no later than February 10, 2005):

1. A Monthly Progress Report must be submitted beginning December 10, 2004 for November 2004, and thereafter on a monthly basis until project completion. The report should indicate all activities undertaken during the previous month. The reports submitted for November and December will be used to ascertain progress in meeting the conditions of this award letter and retention of the funding reservations. A blank Report form is provided at the web address above.
2. The HOME Program requires a firm commitment for each non-Department funding source. Supply evidence of firm commitment from the representative of each of the following sources of funding:
 - Low Income Housing Tax Credit Equity
 - City of Bend CDBG
 - Permanent Loan financing
3. Complete and submit a copy (form included in the Fall 2004 CFC Application) of the Management Plan and Management Agent's Qualifications for review. Include a sample lease or rental agreement. If during project development the management agent or plan should change, a revised plan must be submitted.
4. A preliminary review of the architectural materials submitted with your application has been completed. Comments and requirements will be sent to you under separate cover. All concerns that do not meet OHCS's minimum architectural requirements must be addressed before the project can proceed. When developing your project schedule, allow adequate time in your project schedule to permit the detailed architectural review, possible plan revisions, and a follow up review (if necessary) before bids are solicited or construction begins.

If your architect has any questions regarding design standards or the specific comments outlined above, please contact OHCS's architect, John Czarnecki. He can be reached by phone at 503-986-0972.

5. When your General Contractor has been identified, tell us what steps he/she will take to assure affirmative outreach efforts in the solicitation and use of subcontractors.
6. Resident services appropriate and specific to the identified needs of the targeted population are required by OHCS. Complete and submit, for Department approval, a Resident Services Plan (required format in the Fall 2004 CFC Application). Provide commitment letters or executed agreements with all the agencies providing services to the project.

Due to the fact that you intend to have the project's site manager coordinate the Resident Services plan, the following must be submitted with the Plan in order to receive Department approval:

- a copy of the job description for the site manager position which includes Resident Services coordination;
 - a list of minimum qualifications and experience for the site manager position;
 - a statement describing how the duties of site management and resident services coordination will be compatible.
7. Beginning with the 2004 Spring CFC awards, new construction projects and those undergoing substantial rehabilitation will be required to provide high-speed, shared data internet access to the

living area of each housing unit. Your application indicated that internet access would be provided to each unit, however your application does not provide any additional information. Please indicate where the cost of installation is included in your total project cost and provide a narrative describing what type of connection you will be using, if a consultant will be assisting, and other details of your internet plan. Please remember that the cost of internet installation is to include only the costs incurred over and above the cost of laying regular phone and/or cable t.v. lines to the units.

8. You must complete one of the following within **15 days of the date of this letter**:
- a) Initial each page, sign this letter and **return the original** indicating your acceptance of the reservations and all the terms and conditions of the reservations; or,
 - b) If you have concerns about any of the conditions or timelines contained in this letter, contact me. I will discuss your concerns with your Regional Advisor to the Director (RAD) and if necessary we may schedule a conference with you to discuss your specific concerns.

Housing Development Grant Program (Trust Fund) Conditions:

1. Oregon Administrative Rules require grant terms and conditions be established in a Project Use Agreement. Please provide the name of the entity that will receive the grant funds. The Project Use Agreement will be sent to under separate cover. It will be your responsibility to see that the Project Use Agreement is recorded as an encumbrance against the project property.
2. OHCS may consider releasing Trust Fund program funds prior to meeting all of the General and Trust Fund Conditions only in the following instances and upon completion of the following:
 - a) Trust Fund program funds used for predevelopment expenses can only be used to assist in meeting the General and Trust Fund conditions (architectural, appraisals, etc); and,
 - b) Provide for Department approval an expenditure plan indicating the amount of Trust Fund Program funds required and the use of the funds; and,
 - c) If you do not own the property at the time of fund disbursement, then you will be required to open an escrow account and have the Project Use Agreement placed in escrow and recorded immediately upon obtaining title to the property.

Low-Income Weatherization Program Conditions (Wx)

1. Eligible activities for the Low-Income Weatherization Program funds must demonstrate measurable cost effective energy conservation. For each dollar of the funds requested, you will be required to demonstrate, at a minimum, an equal number of kilowatt savings in electricity for the first year of operation. The reservation amount will be adjusted if the kilowatt savings per hour (kWh) are not demonstrated.
2. To meet program requirements, at least 50% of the units in the project must be rented to households whose income is at or below 60% of the area median income, adjusted by family size, as defined by the U. S. Department of Housing and Urban Development. The recipient's

commitment will remain in place for a minimum of ten (10) years from the date of completion of the project. This commitment will be included in the Project Use Agreement

If you do not own the property at the time of fund disbursement, you will be required to open an escrow account and have the Weatherization Program Project Use Agreement placed in escrow and recorded immediately upon obtaining title to the property.

3. Weatherization funds will be disbursed to reimburse weatherization eligible items when they are purchased and installed.
4. A post construction inspection needs to be completed to verify the proposed energy measures have been satisfactorily completed. An independent third party such as an architect, energy consultant, or local community action agency energy weatherization representative is acceptable to complete the inspection. The inspection must be completed and the results provided to the Department.
6. Eligible baseload measures (lighting, refrigerators, dishwashers, clothes washers, dryers and freezers) should be included which meet Energy Star Criteria and/or units comply with UL-250 with energy-efficiency standards established in the National Appliance Energy Conservation Act of 1987. Refrigerators may not have through-the-door ice or water services, since this feature increases energy use. Documentation of energy savings and costs for appliances and lighting must be supplied to OHCS to meet program requirements. Do not include delivery and installation costs. Include methods of calculations and base measurement for each appliance installed.
7. Reference for effective baseload appliances can be found at <http://www.energy.state.or.us/res/tax/appliance.htm>

Low Income Housing Tax Credits:

1. After this CFC Reservation letter has been returned to us signed and initialed, OHCS will mail a formal LIHTC Offer of Reservation and a LIHTC Reservation and Extended Use Agreement ("Agreement") to you. The Agreement will contain rent restriction language based on information you provided in the Fall 2004 Consolidated funding Cycle Application. It must be signed, notarized and returned to this office within 60 days of the date of the Offer of Reservation Letter. A reservation fee (5% of the annual amount of tax credit offered) is due and payable to the Oregon Housing and Community Services Department at the time you execute the Agreement.
2. OHCS must sign and notarize the Agreement in the same month OHCS receives your signed Agreement and the reservation fee. If you have chosen to lock the percentage rate, it will be applied at the published rate in the month in which the Agreement is executed by all parties and the reservation fee received. You have 60 days from the date of the Offer of Tax Credit Reservation letter to return the signed Agreement and the appropriate reservation fee. Fall CFC applicants may therefore lock in December, January or February; Spring CFC applicants may lock in July, August or September.

If the Reservation and Extended Use Agreement and appropriate reservation fee are NOT returned to OHCS within 60 days of the date of the Offer of Tax Credit Reservation letter, you will forfeit the option of locking the rate and must wait until the Placed in Service date to rate lock.

Please return this CFC Reservation letter in a timely fashion as a delay will not extend the time period you have in which to make your rate lock decision - you will still be held to the December, January, February or July, August, September lock rates.

3. OHCS's "Hold Harmless Agreement" should be signed when you enter into the Reservation and Extended Use Agreement.
4. All LIHTC projects require a comprehensive market study of the housing needs of the individuals served by each project. A disinterested third party approved by OHCS must prepare the study. A third party market study must be submitted and approved by the department prior to obtaining a carryover allocation. Make certain that the market study addresses the issues outlined in the department's format for the study. The latest format is included in the department's Fall 2004 Consolidated Funding Cycle application.
5. If the project will not be completed in 2005 you will need to apply for a carryover allocation to show the "10% test" will be met by June 30, 2006. The application for a carryover allocation must be submitted by December 1, 2005 and include an updated data summary form to include limited partnership name and taxpayer identification number, updated housing operating budget, and updated LIHTC forms from the CFC application packet if there are any changes. An application for carryover is available from OHCS. Be sure to re-date any pro forma sheets that are updated.

Certification of the 10% test must be provided by a third party tax professional, such as a Certified Public Accountant or a Tax Attorney, before June 30, 2006. If you would like to complete your carryover allocation, i.e., complete the 10% test, at the time of submission of your carryover application it will be necessary to provide certified costs.

7. **Managers Unit:** Please clearly indicate the number of manager units to be included at the property. It is important to note this in all LIHTC documentation because a unit used for a full time manager is considered common space and will not require the resident to be income qualified while still allowing the unit to be included in the project basis. Not designating a manager's unit requires that units, in order to remain in basis, must house an income-qualified tenant.

Please state the unit mix as follows:

53 # Units affordable (LIHTC income qualified units)

1 # Units considered common space (manager's unit)

9. Please describe how your partnership fulfills these expectations:

You are requesting the 9 % credit.

You are requesting the 130% bonus in a difficult to develop area or a qualified census tract.

If yes to both of the above, HOME funds must be loaned to the partnership at or above the Applicable Federal Rate (AFR) or must be deducted from the basis calculation.

If yes to both of the above, HOME funds may be loaned below the AFR if at least 40% of the LIHTC units are targeted and affordable to households at or below 50%

of median family income and not impact basis.

_____ If yes to both of the above, HOME funds may not be traced to basis or non-basis items such as land acquisition unless a written, legal opinion (acceptable to OHCS) is acquired. Otherwise the HOME funds must be removed from basis.

10. If you are requesting other than State HOME funds, or any other funds that will be loaned to the project, please submit a discussion on the terms of those funds. Describe if it is a grant or a loan, and if the funds are loaned to a partnership. If a HOME loan or partnership loan, discuss the terms of payoff and include the payment data for that loan on your pro forma expense page.
11. If your project is in a hard to develop area, provide map with census tract identified to qualify for the 130% bonus or recalculate your annual tax credits at 100% of costs.

Oregon Affordable Housing Tax Credit Program:

1. Enclosed is a copy (original mailed to NOAH) of the "Reservation Letter" reserving Oregon Affordable Housing Tax Credits for 180 days or until 180 days from date of letter. In order to receive a "Certification" qualifying your lender to claim the tax credits, the following must be provided:

Evidence you have received a firm commitment of financing for \$1,688,213 from NOAH by May 8, 2005 which indicates the amount of OAHTC to be used.

Included under the Development Forms link on the CFC website is a sample copy of the "Declaration of Land Use Restrictive Covenants". We will complete this document and require it be recorded against the project property at the time your permanent loan with NOAH is closed.

HOME Conditions of Reservation

1. The HOME reservation will be subject to a satisfactory environmental review. The environmental review process must be completed and a release of funds obtained from HUD prior to you taking any "choice limiting" actions on the project site. In other words, you cannot undertake any action or activity that could limit the project to the specific site or perform any physical development activities on the site until a release of funds is obtained from HUD. This includes, but is not limited to, property acquisition, demolition, or construction work. It doesn't matter whether these activities are to be paid with HOME funds or some other source of funds including your own resources. No activities can be done until OHCS receives a release of funds from HUD. Doing so could jeopardize an award of HOME funds.

A HOME Program staff person has initiated the environmental review process and you may already have been or soon will be contacted about the results of the review and whether it is necessary for you to publish a public notice. Publication of a public notice provides a 30-day period for citizens to comment on your project. At the end of the comment period, if no issues are raised through public comment, HUD will release the HOME funds. You can estimate a minimum of 45 days from time of publication before HUD will provide a Release of Funds. The time period will be longer if public concerns on the project are raised.

2. A HOME grant reservation becomes an award when all of the General and HOME conditions are met. At that time a HOME Grant Agreement will be executed. Costs incurred prior to execution

of a grant agreement can not be paid with HOME funds. Currently the understanding of costs incurred includes any obligations incurred due to contractual agreements to perform work. Therefore, you should not enter into any agreement or contracts that will be paid with HOME funds until a grant agreement is executed.

There is one exception. Some predevelopment costs incurred prior to execution of the HOME Grant Agreement (and no earlier than 6 months before application) may be eligible for reimbursement with HOME funds. Reimbursement of HOME funds will be limited to the following costs: legal, consulting, environmental and other studies, engineering and design costs, zoning approvals, inspections and testing for hazards, costs related to obtaining site options, project financing and fees for loan commitments. These activities must not have a physical impact on the site. Reimbursement will occur after execution of the HOME Grant Agreement. Prior Department approval must be received before HOME funds can be used to reimburse predevelopment costs. Therefore you must:

- a) Provide OHCS an expenditure plan indicating the amount of HOME funds required and the use of the funds.
3. Prior to acquiring the property, obtain an appraisal indicating the fair market value of the property (appraisals are acceptable only when completed by a licensed appraiser or real estate broker). You must notify the seller of the fair market value (refer to URA sample letter 5C included in the CFC Application) and the seller must sign the notice agreeing to sell the property for the lesser of the negotiated sales price or the fair market value of the property. The appraisal and seller signed notification must be submitted to this office before the property is acquired even if non-HOME funds are to be used for the acquisition.
 4. Property tax exemption has been identified as a potential match contribution on this project. In order to determine the amount of property tax exemption that can be credited as match, you must provide verification from the taxing jurisdiction indicating the number of years the exemption will be granted. If the exemption will be on-going and will continue as long as the ownership and use of the property remains the same, then this must be indicated in the letter verifying tax exemption eligibility. If you must apply annually for the tax exemption then we can only credit one year towards your match obligation. If this occurs, then you must identify additional eligible match or the HOME reservation will be reduced.
 5. Sponsors with projects containing 5 or more units must affirmatively market the units before renting them. Therefore, it is necessary to take steps to provide information and otherwise attract eligible persons from all racial, ethnic, and gender groups in the housing market area to the available housing.
 - a) Execute the Affirmative Marketing Policy found at: http://www.ohcs.oregon.gov/OHCS/HRS_Reservation_Letter_Attach.shtml under the "Reservation Letter Attachments".
 - b) Describe the affirmative marketing efforts to be taken in renting the units.
 6. Please submit in narrative form the efforts that you will take to meet section 3 criteria by providing economic opportunities to low and very low income persons residing in the targeted geographical area. Section 3 of the Housing and Urban Development Act of 1968 requires HOME recipients to direct jobs, training and contracting opportunities to businesses owned by or employing low and

very low income residents. HOME recipients are required to keep records and provide reports on their section 3 efforts. Section 3 requirements, details and recordkeeping forms are included at http://www.ohcs.oregon.gov/OHCS/HRS_Reservation_Letter_Attach.shtml under the Reservation Letter Attachments".

7. All HOME projects with construction costs in excess of \$50,000 must have a project sign located prominently at the site. In addition to the contributors listed on the sign, sponsors must include any contribution of HOME funds under HUD in lettering no smaller than that used to acknowledge other contributors to the project. Use the "HUD" name rather than "HOME" name when listing the project's contributors. The sign is to be installed prior to construction and is to be maintained for the duration of the construction contract. Project sign costs can be reimbursed from HOME funds. Once construction/rehab begins, provide OHCS with photos of the approved Project Sign, plus Fair Housing and EEO posters on display at the construction site. Contact OHCS if you need copies of these posters. Photos may be submitted as prints, color photocopies or digital images.
8. HOME-assisted units must be designated as fixed or floating. "Fixed" units remain the same throughout the period of affordability. "Floating" units change but each substituted unit must be comparable in terms of size, features, and number of bedrooms to the originally designated HOME-assisted unit.

Designate here that the HOME-assisted units in this project shall be:

_____ Fixed Floating

9. As part of the subsidy layering review, OHCS must be immediately notified if additional governmental assistance besides that listed in the current Sources of Funding is obtained in for this project.
10. Submit the Fair Housing Resolution, found at: http://www.ohcs.oregon.gov/OHCS/HRS_Reservation_Letter_Attach.shtml under the "Reservation Letter Attachments". It is to be typed on Board of Directors letterhead and signed by members of your Board.

Participatory Requirements

As a recipient of Housing and Community Services funds, OHCS requires compliance with the following. Meeting these requirements will be a measure of determining sponsor capacity in future Department applications.

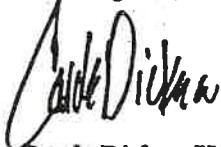
1. Review the timelines you indicated in the Project Schedule enclosed with the CFC Application and revise from time to time as applicable. Submit a revised Project Schedule when changes are necessary. Your ability to meet these timelines will be a measurement for retaining the funding reservations.
2. As changes occur to the project's development and operating costs, a revised Sources of Funding, Uses of Funding, and/or Operating Budget reflecting the current project status must be submitted.
3. OHCS has standard grant, loan and tax credit documents that generally are not open to modification. Copies of sample documents will be forwarded to you and should be reviewed by

you and your legal counsel to acquaint yourselves with the program obligations. Should requests be made by you or your legal counsel to modify any language in the documents, you will be obligated for reasonable legal costs incurred by OHCS in considering such modifications. Such OHCS legal costs will be billed to you and must be paid by you to OHCS prior to execution of the documents. Any requests for modifications to the standard documents should be discussed with the Housing Development Representative.

4. Submit a revised Uses of Funding once construction bids are received and project costs are finalized. Upon receipt, OHCS shall re-examine the amount of resources reserved for the project and may elect to adjust according to need.
5. Compliance with the Fair Housing Act as amended: You will need to research the Fair Housing Act to make sure the project is in compliance. A copy which summarizes some of the requirements of the Act may be obtained by contacting OHCS.
6. To ensure that minority-owned, women-owned and emerging small business enterprises will be used to the greatest extent possible, undertake the affirmative outreach efforts as outlined in your CFC application. As requested, provide reports showing the efforts undertaken and the results of such efforts.
7. Adherence to all federal, state and program regulations applicable to your organization and your proposed project is a basic requirement.
8. Grant disbursements must be requested on OHCS's Drawdown Request form with back-up documentation such as invoices, billings, and paid receipts. An Electronic Funds Transfer set-up form must be completed prior to any drawdowns for project expenses. Examples of these forms can be found at: http://www.ohcs.oregon.gov/OHCS/HRS_Reservation_Letter_Attach.shtml under the "Reservation Letter Attachments".
9. Display of the Fair Housing name and/or logo when project units are marketed/promoted is required.
10. Oregon Housing and Community Services shall be listed by name on all materials where the project contributors are listed by name.
11. Upon receipt of the grant and/or tax credit resources, you agree to provide, from time to time as requested, annual income and operating expense reports for the completed development for the agreed upon period of affordability.
12. It is expected that grant funds will be expended for eligible project-related expenses by June 1, 2005.
13. Develop an administrative notebook that will be available on site for management use which contains copies of:
 - Current year rent and income limits and utility allowances (adding subsequent limits as they are issued)
 - The executed project use agreements and restrictive covenants for each OHCS grant, loan or tax credit resource provided to the project.
 - 8609s (if project received LIHTC)
 - current resident services plan

OHCS congratulates you on your funding reservation(s) and looks forward to a successful completion of your project. Please contact me at 503-986-2137 or carole.dicksa@hcs.state.or.us, if you have any questions concerning your Grant and Tax Credit reservations.

Best Regards,



Carole Dickson, HOME Program Manager
Housing Resources Section

Enclosures

c: Darcy Strahan, Regional Advisor to the Director

**AGREED TO AND ACCEPTED ON THE TERMS AND CONDITIONS SET FORTH ABOVE
FOR THE FOLLOWING GRANT AND/OR TAX CREDIT RESERVATIONS:**

\$ 100,000 Housing Development Grant (Trust Fund);

\$ 689,500 annual allocation of 2005 Low Income Housing Tax Credits;

\$ 540,000 of Oregon Affordable Housing Tax Credits;

\$ 500,000 HOME Investment Partnerships Program Grant (HOME);

\$ 44,365 Low-Income Weatherization Program.

By: John N. Gilbert III


Principal, Acadia Properties, LLC

11/23/04
Date

QUALIFIED RENTAL PROPERTY TAX EXEMPTION STAFF REPORT



PROJECT NUMBER: PRTX202600206 (Property Tax Exemption)

CITY COUNCIL DATE: April 15, 2026 at 5:30 p.m.
City of Bend Council Chambers (hybrid)
710 NW Wall Street, Bend, OR 97703

REPORT DATE: February 20, 2026

APPLICANT & OWNER: Mountain Laurel Lodge Limited Partnership
5 NW Minnesota Ave #210
Bend OR 97703

AGENT: Rima Wilson
1440 NE 6th St
Bend OR 97701

PROJECT LOCATION: 990 SW Yates Dr, Bend OR 97702
Deschutes County Assessor's Map 18-12-06C0, Tax Lot 00900

REQUEST: Qualified Rental Property Tax Exemption, 20-year tax abatement on residential improvements

STAFF REVIEWERS: Kerry Bell, Housing Production and Incentives Coordinator
(541) 323-5964; kbell@bendoregon.gov

SUMMARY:

Mountain Laurel Lodge is an affordable housing community for seniors, 55 and older, offering all 54 units to qualified households earning up to 60% AMI. Mountain Laurel Lodge opened its doors in 2006 and was the first community in Bend to be approved for this 20-year Qualified Rental Property Tax Exemption. The current property tax exemption will sunset in 2027. To continue providing low-income affordable housing, they intend to renew their exemption application. Mountain Laurel Lodge is applying for a new 20-year Income Qualified Property Tax Exemption under ORS 307.515.

This memo outlines the background and relevant information about this development for partnering taxing districts' staff and board. This Staff Report is being sent to all 7 taxing district administrators simultaneously, with a request for consideration and approval by the taxing district's governing bodies. City staff requests taxing district staff to communicate intended dates for their governing boards to consider the application and coordinate with

City staff on any desired presentations and further requested information. This development meets the criteria in Bend Code and City staff recommend approval of the 20-year exemption.

PROJECT & SITE OVERVIEW:

The project site is 990 SW Yates Dr, fronting Century Dr adjacent to Oregon State University Cascades college campus. The project is to reserve existing affordable housing in a single 3-story multifamily residential building, with parking. Amenities include a community room, community living areas and outdoor space for residents to enjoy. All 54 residential units will be designated for low-income senior living and rented at levels affordable to those making 60% Area Median Income (AMI) or less.



Figure 1. Site Location



Figure 2. Building Image

Eligibility Criteria:

The project site is 990 SW Yates Dr. Upon review of the application documents, this project is deemed eligible based on meeting the criteria listed below.

Eligibility of the Property and Development:

The income qualified tax exemption program requires that the property be located within the limits of the City of Bend, be a multifamily project containing three or more units, offering for rent, or held for the purpose of developing qualified rental housing, to be occupied solely by persons qualified as low-income

Rent Payment:

The required rent payments must reflect the full value of the tax exemption.

Project and Application Timeframe Eligibility and Requirements:

The housing units on the property are required to have been constructed after November 5, 2003 and the application must be filed before July 1, 2030, with the application being approved by the Bend City Council in accordance with the provisions of ORS Chapter 307.523 and Bend Code Chapter 12

Estimated Exemption & Financial Impact:

See attached Memo from the City of Bend Urban Renewal and Real Estate Department



Accommodation Information for People with Disabilities & Language Assistance Services

You can obtain this information in alternate formats such as Braille, electronic format, etc. Free language assistance services are also available. Please email accessibility@bendoregon.gov or call



541-693-2198. Relay Users Dial 7-7-1. All requests are subject to vendor processing times and should be submitted 48-72 hours in advance of events.

Servicios de asistencia lingüística e información sobre alojamiento para personas con discapacidad

Puede obtener esta información en formatos alternativos como Braille, formato electrónico, etc. También disponemos de servicios gratuitos de asistencia lingüística. Póngase en contacto en correo electrónico accessibility@bendoregon.gov o número de teléfono 541-693-2198. Los usuarios del servicio de retransmisión deben marcar el 7-1-1. Por favor, envíe sus solicitudes con 48-72 horas de antelación al evento; todas las solicitudes están sujetas a los tiempos de procesamiento del proveedor.



CITY OF BEND

MEMO

To: City of Bend Housing Department

From: Jonathan Taylor, Urban Renewal and Real Estate

Date: 2/4/2026

Re: Mountain Laurel Lodge Analysis

The follow memo is an analysis of the impacts to the revenues of taxing districts that will be affected if the applicant is granted an extension on the Qualified Rental Property Tax Exemption. The Qualified Rental Property Tax Exemption is a 20-Year exemption on all taxes associated with the property. This affects standard rates and special assessments, levies, and bonds.

The property in question is a 54-unit multiunit residential complex at 990 SW Yates Drive. The property first received The Qualified Rental Property Tax Exemption in 2006 for providing rents to households earning at or below 60% area median income. The property is deed restricted to be income- and rent restricted until 2066.

This analysis was conducted by the Office of Economic Development utilizing the 2025-2026 property assessed valuation established by the Deschutes County Assessor. The amounts are intended to provide a general impact for first year of the renewed exemption and the total of program exemption over 20-years. Voter approved bonds have been excluded from the 20-year exemption total. The forecast cannot accurately assume these levies will continue at FY2026 rates for the duration of the requested extension.



	First Year (2026)	20-Year Exemption Total
Deschutes County	\$7,083	\$190,332
Deschutes County Soil and Water District	\$332	\$8,934
County Library	\$3,048	\$81,892
County Library Bond	\$1,748	
County-Wide Law Enforcement	\$6,927	\$186,118
4-H	\$124	\$3,335
9-1-1	\$2,005	\$53,870
City of Bend	\$15,535	\$417,426
Bend Road Bond 2011	\$526	
Bend Road Bond 2021	\$2,353	
Bend Local Option	\$4,211	
Bend Parks and Recreation	\$8,096	\$217,535
BPRD Bond	\$662	
Bend-La Pine School District	\$26,399	\$709,349
SD#2013	\$1,990	
DSD#2017	\$4,867	
SD#2023	\$3,315	
COCC	\$3,438	\$92,374
COCC Bond	\$432	
High Desert	\$534	\$14,353
Total	\$93,626	\$1,975,519

This analysis excludes urban renewal division of taxes.