



Board Work Session of the Board of Directors
BANKS SCHOOL DISTRICT 13
Banks, OR
Tuesday, February 7, 2023

Note: The District will endeavor to provide the following services if requested 48 hours prior to the meeting: qualified bilingual interpreters or qualified sign language interpreters. These services are provided at no cost to recipient. To obtain services, call 503-324-8591 at least 48 hours prior to this meeting.

1. Preliminaries
2. Presentations/Reports
 - 2.1. Superintendent's Evaluation
 - 2.2. 2023-2024 Draft Calendar
 - 2.3. Integrated Guidance Application & Next Steps
 - 2.4. Strategic Plan Update & Next Steps
 - 2.5. Oregon Government Ethics Commission Financial Disclosure
Board Members will receive information on the required Financial Disclosure filing process, due April 15th, and will ask clarifying questions if needed.
 - 2.6. Budget Committee Members
 - 2.7. Budget Committee Calendar
The Board will review the 2023-2024 Budget Calendar.
3. Adjourn

Banks School District #13

2023-2024 **DRAFT** CALENDAR

- XX** New Teacher Inservice
- XX** Teacher Inservice
- 29** First Day Grades 6th, 9th & New Students, Elementary Open House
- 30** First Day Grades 1st-12th

AUGUST 2023						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

FEBRUARY 2024						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

19 Presidents' Day

- 1** Schools closed
- 4** Labor Day
- XX** **A** Group Kindergarten Full Day
- XX** **B** Group Kindergarten Full Day
- XX** KG No school (Kindergarten Only) First full day for all Kindergarten

SEPTEMBER 2023						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

MARCH 2024						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

25-29 Spring break - Schools closed

- 13** Statewide Inservice - Schools closed

OCTOBER 2023						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

APRIL 2024						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

12 Grading Day - Schools closed

- 3** Grading Day - Schools closed
- 10** Veterans Day Schools closed
- XX** Conferences
- 17** Conference Makeup Day - No School
- 20-24** Fall Break

NOVEMBER 2023						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

MAY 2024						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

3 Elementary closed
27 Memorial Day

- 25-29** Winter Break

DECEMBER 2023						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JUNE 2024						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

19 Juneteenth
14 Students' last day

- 1-5** Winter Break
- 15** Martin Luther King Day - Schools closed
- 26** End of first Semester
- 29** Grading Day - Schools closed

JANUARY 2024						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

JULY 2024						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

4 Independence Day

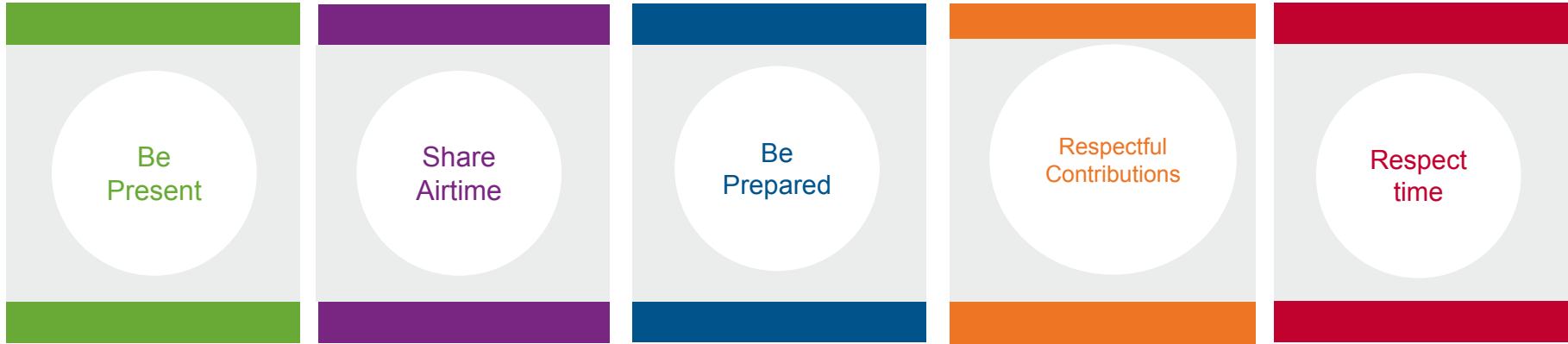
Strategic Planning Steering Committee Meeting #4

January 30, 2023



BANKS SCHOOL DISTRICT

Community Agreements

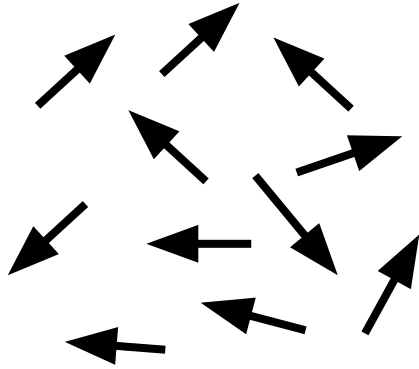


Agenda

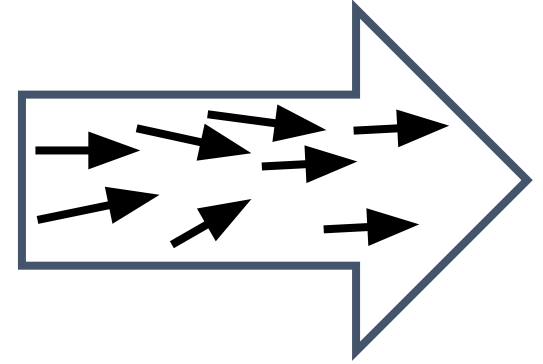
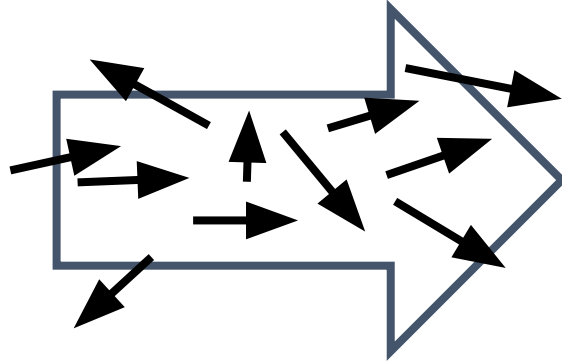
1. Review “Community” priority area
2. Review language on “Finance” and “Facilities” priority areas
3. Consider unifying language for priority areas
4. Review Vision statement



The Goal of Strategic Plans

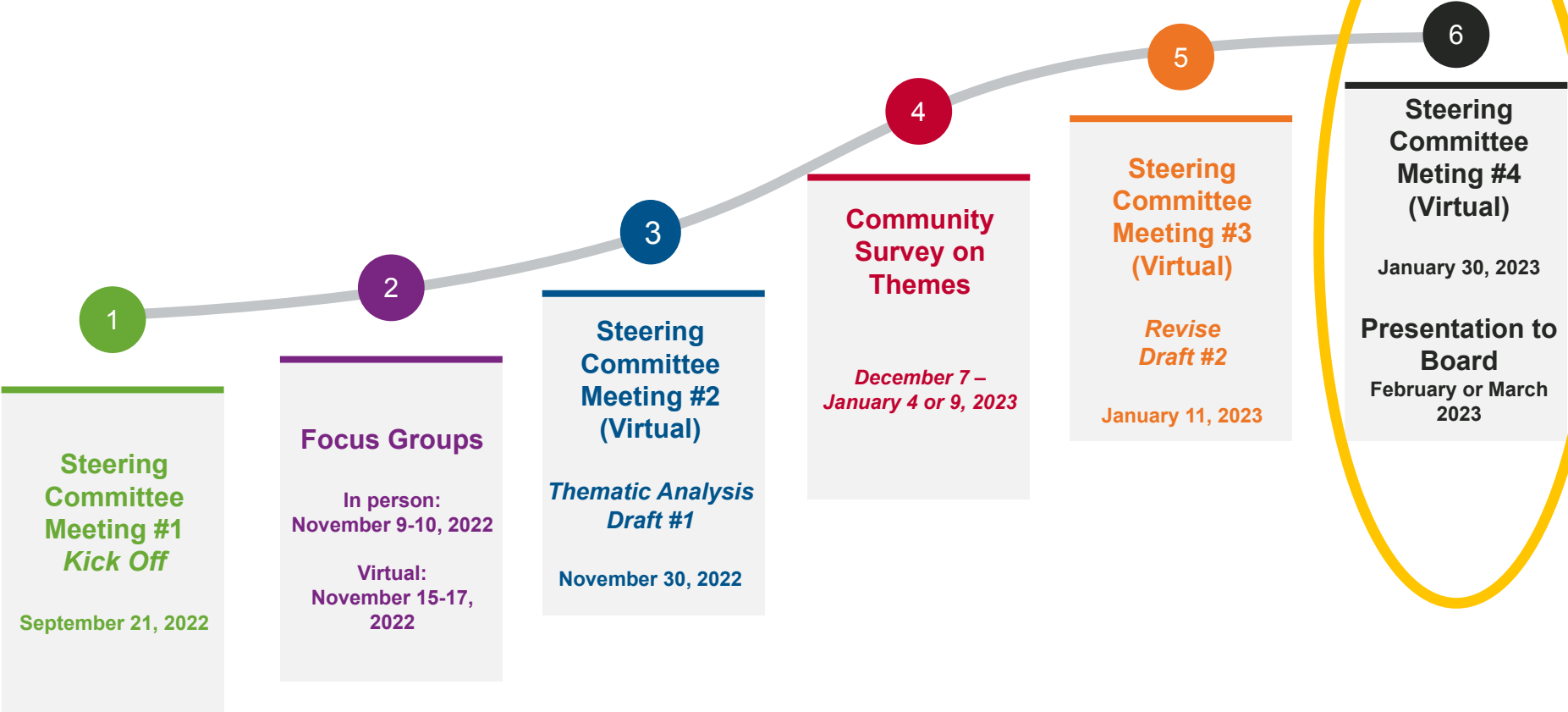


**FROM RANDOM
ACTS OF
IMPROVEMENT**



**TO ALIGNED
ACTS OF
IMPROVEMENT**

Road Map of the Strategic Planning Process



Draft Theme and Summary Statement

Community

The Banks School District recognizes the support of family and community groups to be vital to the student experience. Community groups are involved in supporting the student experience through work-based learning experiences and other collaborative partnerships for the benefit of all students. All families receive proactive communication from the district that enhances relationships.

Draft Theme and Summary Statement

Community

The Banks School District understands

- family support is essential to the school experience and ensures relationships through proactive communication; and
- community groups' support is vital to the school experience of all students through work-based learning experiences and other collaborative partnerships.

Draft Theme and Summary Statement

Facilities

The Banks School District Community will maintain and improve all facilities to provide learning and working environments that are a source of pride for the community and that enrich the student experience.

The Banks School District Community will maintain and improve all facilities to provide

- innovative teaching, learning, and working environments that enrich the student experience,
- safe and healthy environments,
- inclusive and accessible spaces; and
- a resource and source of pride for the community.

Draft Theme and Summary Statement

Finance

All Banks School District resources

- are responsibly and transparently maintained,
- maximized, and
- clearly aligned to achieve the strategic plan goals.

Draft Theme and Summary Statement

Students

The Banks School District will empower all students by providing

- equitable learning that supports their academic growth and achievement;
- enriching and challenging instruction;
- learning experiences connected with their interests, passions, and life skills; and
- a positive school culture.

Draft Theme and Summary Statement

District Team

The Banks School District will empower and support all staff members

- to create positive and caring learning experiences;
- by providing high quality professional development;
- by providing the resources to be successful in their role; and
- to feel welcomed, engaged, and appreciated.

Consensus?

If you are a 0 to 2, what do you need resolved to move your position to a 3 or higher?



0 - No way!
I will block this.



1 - I see MAJOR issues we need to resolve.



2 - I see MINOR issues we need to resolve now.



3 - I see MINOR issues we can resolve later.



4 - I am fine with this as it is.



5 - I love this! I will champion it.

Lack of Consensus

Consensus

Draft Priority Areas Titles

Students	Facilities	District Team	Community	Finance/ Operations
Empowering our Students	Enriching our Facilities	Energizing our Team	Engaging our Community	Aligning our Resources

Consensus?

If you are a 0 to 2, what do you need resolved to move your position to a 3 or higher?



0 - No way!
I will block this.



1 - I see MAJOR issues we need to resolve.



2 - I see MINOR issues we need to resolve now.



3 - I see MINOR issues we can resolve later.



4 - I am fine with this as it is.



5 - I love this! I will champion it.

Lack of Consensus

Consensus

Current Vision

To engage, challenge and prepare every student ~~to realize their potential~~ in learning and life.

We will engage, challenge, and prepare every student.

Consensus?

If you are a 0 to 2, what do you need resolved to move your position to a 3 or higher?



0 - No way!
I will block this.



1 - I see MAJOR issues we need to resolve.



2 - I see MINOR issues we need to resolve now.



3 - I see MINOR issues we can resolve later.



4 - I am fine with this as it is.



5 - I love this! I will champion it.

Lack of Consensus

Consensus

Next Steps



Task	Owner
Write summary report	Studer Education
Prepare core slide deck for Board Presentation	Studer Education
Schedule Presentation to Board – March 2023	Dr. Sica and BSD Board Leadership
Presentation to Board	Dr. Sica and Representatives from Strategic Planning Steering Committee

Thank you!



Thank you to Dr. Sica, the Board of Education, and the Banks community for this opportunity.

DR. CASEY BLOCHOWIAK
CBLOCHOWIAK@HCG.COM



Statements of Economic Interest

The Statement of Economic Interest is a report that ORS 244.050 requires individuals holding certain public positions to file annually with the Oregon Government Ethics Commission (OGEC).

Who files an SEI?

In general, persons who hold the following positions are required to file:

- Certain statewide elected officials
- Legislative officials
- Judicial officers
- Candidates for the above-named positions
- Elected city or county officials
- Members of city or county planning, zoning or development commissions'
- Managers or principal administrators of a city or county
- Chief administrative officer and financial officer of each common and union high school district, ESD and community college
- Members of the board of commissioners of ports
- Certain state agency directors
- Members of certain boards and commissions
- **NEW 2023** all school board members of each common and union high school district
- [See ORS 244.050](#) for a complete list of filers

When is the SEI due?

SEI filers are required to file an annual an SEI if they are seated and hold their position on April 15th of any given year. The information to be reported reflects activity from the preceding calendar year; for instance, if seated on April 15th of 2023, the SEI would include information relating to the 2022 calendar year. **This applies even if the person did not hold their position during the preceding calendar year.**

SEI Filer Training & Resources

Additional information, resources and training materials are available in the [Training Section](#) of this website.

- [SEI Filer Training](#)
- [Statement of Economic Interest Filer Guide](#) (pdf) is step-by-step instructions on how to create your account, navigate EFS, file your SEI, and information on the SEI questions.

Questions in the SEI

Below is a brief description of the questions asked on the annual SEI, and information on the answers SEI filers will be required to provide.

1A. Officer or Director of a Business

SEI filers are required to list any businesses in which they or a member of their household maintained a position as an officer or director during the preceding calendar year.

NOTE: This applies to personal business ventures, not the public position(s) they hold.

List the Business Name, the Title of Office, Business Address, Held by Whom, and a Description of the Business. [ORS 244.060(1)]

1B. Business Names

SEI filers are required to list the names of businesses that they or members of their household did business under during the preceding calendar year.

List the Business Name, the Title of Office, Business Address, Held by Whom, and a Description of the Business.

NOTE: Items A and B may be the same and Item B may be subsidiary of parent company listed in Item A.

[ORS 244.060(2)]

2. Sources of Income

SEI filers are required to list all sources of income (not the amount of income) that made up 10% or more of their total annual household income in the preceding calendar year. This includes any household member who is 18 years of age or over.

Businesses are sources of income, not the individual clients of the business.

List the Name of the Source, Address of the Source, and a Description of the Source (which household member received the income).

NOTE: Do not leave Question 2 unanswered. Everyone should have some source of income, such as Social Security, "X" Company (employer), etc.[ORS 244.060(3)]

3. Real Property

SEI filers are required to list all real property (residential, commercial, vacant land, etc.) located within the geographical boundaries of the jurisdiction they serve, other than their principal residence, in which the SEI filer or household member had any ownership interest, option to purchase or sell, or other legal right to in the preceding calendar year.

For example, a county commissioner would list any properties, such as rentals, vacant lots, or commercial properties they own that are located within the county boundaries. Legislators, statewide elected officeholders, and appointed state officials must disclose relevant property owned anywhere in the State of Oregon. Examples of appointed state officials who are SEI filers include public university presidents, the Director of the Oregon Health Authority, and the Executive Director of the Oregon Government Ethics Commission.

[ORS 244.060(4)(b)]

4A. Office Related Events

SEI filers are required to list the amount of any expenses with an aggregate value exceeding \$50 that were paid by a source other than the jurisdiction they serve during the preceding calendar year.

Section A includes events where expenses were paid by a government entity, Native American tribe, membership organization or nonprofit organization, where the public official was participating in a convention, fact-finding mission, or where they were representing the government. [ORS 244.020(7)(b)(F)]

NOTE: This is one of two instances in which SEI filers are required to upload a receipt to their annual SEI report. The paying entity should provide the public official a receipt of the costs within ten days of the date the expenses occurred. [ORS 244.100]

4B. Office Related Events

SEI filers are required to list the amount of any expenses with an aggregate value exceeding \$50 that were paid by a source other than the jurisdiction they serve during the preceding calendar year.

Section B covers events where the public officially represents a government body on an officially sanctioned or designated trade promotion, fact finding mission, negotiation or economic development activities described in the exception to gift restrictions. These events are those that were officially sanctioned or designated by the official's public body. [ORS 244.020(7)(b)(H)]

NOTE: Do not list expenses that were paid by the public body the SEI filer represented.

5. Honoraria

SEI filers must report any honoraria over \$15 in value that they received in the preceding calendar year. Honoraria is something of economic value given to a public official in the exchange for services where the custom or propriety prevents setting a price, where the service is usually a speech or presentation. SEI filers list all items over \$15 in value and include details such as the nature of the event, the provider's name, and the date and amount received.

NOTE: This is second of the two instances in which SEI filers are required to upload a receipt to their annual SEI report. The paying entity should provide the public official a receipt within ten days of the event for which the item was received. [ORS 244.100(2)]

6. Shared Business with Lobbyist

This question directs the SEI filer to list any compensated lobbyist who was associated with a business that the SEI filer or household member was also associated with in the preceding calendar year. If any businesses or sources of income from questions one and two paid a lobbyist registered in Oregon, the SEI filer would list those businesses here.

Owning stock in a publicly traded company in which the lobbyist also owns stock is not a relationship that requires disclosure. [ORS 244.090(1)]

Report the Name of the Lobbyist, the Name of the Business, and the Type of the Business.

7. Income of \$1,000 or More

SEI filer is required to list any individual or business from who the SEI filer or household member received an income of \$1,000 or more that had an economic interest in their role as a public official.

Report the Income Source, Address, and Description.

DO NOT ANSWER questions 7, 8, 9, and 10 unless the source of the interest is derived from an individual or business that has a legislative or administrative interest or that has been doing business, does business, or could reasonably be expected to do business with the governmental agency which you hold an official position or over which you exercise authority.

8. Debt of \$1,000 or More

List any individual or business to whom the filer or member of their household owed a debt of \$1,000 or more and that had an economic interest in their role as a public official. Excluded are debts owed to banks for credit card purchases or other personal debts owed to financial institutions.

List the Name of Creditor, Date of Loan, and the Interest Rate of Loan.

DO NOT ANSWER questions 7, 8, 9, and 10 unless the source of the interest is derived from an individual or business that has a legislative or administrative interest or that has been doing business, does business, or could reasonably be expected to do business with the governmental agency which you hold an official position or over which you exercise authority.

9. Business Investment of More than \$1,000

List any individual or business that the SEI filer or member of their household had a personal, beneficial interest in, or investment of, more than \$1,000 and that had an economic interest in their role as a public official.

NOTE: Do not list the amount of the investment. Do not list individual items in a mutual fund or blind trust, or a time or demand deposit in a financial institution, shares in a credit union or the cash surrender value of life insurance. [ORS 244.070(2)]

List the Business Name, Address, and a Description of the Business.

DO NOT ANSWER questions 7, 8, 9, and 10 unless the source of the interest is derived from an individual or business that has a legislative or administrative interest or that has been doing business, does business, or could reasonably be expected to do business with the governmental agency which you hold an official position or over which you exercise authority.

10. Service Fee of More than \$1,000

SEI filers are required to list any individual or business that paid the SEI filer, as an individual, a service fee of more than \$1,000 and that had an economic interest in their role as a public official.

NOTE: Do not list fees if you are prohibited from doing so by law or a professional code of ethics. [ORS 244.070(3)]

DO NOT ANSWER questions 7, 8, 9, and 10 unless the source of the interest is derived from an individual or business that has a legislative or administrative interest or that has been doing business, does business, or could reasonably be expected to do business with the governmental agency which you hold an official position or over which you exercise authority.

A close-up, low-angle photograph of a laptop keyboard. The keys are dark with white lettering. A strong red light illuminates the scene from the top, creating a vibrant glow and casting soft shadows. The background is blurred, showing more of the keyboard and the laptop's surface. The overall mood is professional and modern.

Statement of Economic Interest Filer Guide

**Oregon Government
Ethics Commission**

3218 Pringle Rd SE, Ste 220
Salem, OR 97302-1680

503-378-5105

www.oregon.gov/ogec

Revised 12.23.2022

TABLE OF CONTENTS

Introduction	2
Who is Required to File	2
Jurisdictional Contact	3
Getting Started	4
Creating Your Account.....	4
Registration Code/ Token ID	8
Managing Your EFS Account	9
Login	9
Dashboard	10
Forgot Password.....	12
Forgot Username	13
Editing/Updating Account Information	14
Updating Contact Information	15
Updating Password	16
Updating Security Questions.....	16
Updating Alternate Contact	16
Save Changes	17
Date of Appointment.....	17
Resigning from Position.....	18
Filing an SEI.....	18
Filing Tips.....	20
Question 1: Business Office or Directorship; Business Name:	21
Question 2: Sources of Income	22
Question 3: Real Property.....	23
Question 4: Office Related Events	23
Question 5: Honoraria	25
Question 6: Shared Business with Lobbyist.....	25
Question 7: Income of \$1,000 or More	26
Question 8: Debt of \$1,000 or More.....	26
Question 9: Business Investment of \$1,000 or More.....	27
Question 10: Service Fee of \$1,000 or More.....	27

Verify and Save	27
Most Common Filing Errors.....	29
Statutory References.....	30
Definitions	31
FAQS	31
System Requirements.....	32

DISCLAIMER

This training material is issued by the Oregon Government Ethics Commission (OGEC) pursuant to ORS 244.340 Continuing Education Program. This publication is intended for educational and training purposes only and should not be used as a substitute for a review of the specific statutes and rules. There may be other laws or regulations not within the jurisdiction of OGEC that apply to actions or transactions described in this training material. Do not reproduce or distribute without the express written permission of the OGEC.

INTRODUCTION

If you are receiving this guide from your public body, the OGEC has been informed that you are a public official who is required by ORS 244.050 to electronically file a Statement of Economic Interest (SEI). The governing body you serve has provided us with your name, position, and email address. You will receive a system-generated email from the OGEC to create a username, password and confirm your pre-filled personal profile information is correct and electronically submit to OGEC. You will need to create your profile before March 15th to ensure you receive all communications from OGEC.

During the filing period, failure to complete and electronically file by the final filing date may subject you to an automatic civil penalty of \$10.00 for each of the first 14 days the SEI is late and \$50.00 for each day thereafter, up to a maximum of \$5,000.00 [ORS 244.350(4)(c)].

WHO IS REQUIRED TO FILE

There are approximately 6,000 Oregon public officials who must file an Annual Verified Statement of Economic Interest (SEI) with the Oregon Government Ethics Commission (OGEC) by **April 15th** of each calendar year.

Public officials who are required to file reports are specified in ORS 244.050.

Please refer to that section of the law to see if your specific position requires you to file

these forms. In general, public officials who hold the following positions are required to file:

- **State:** Public officials who hold elected or appointed executive, legislative or judicial positions. This includes those who have been appointed to positions on certain boards or commissions.
- **Counties:** Elected officials, such as commissioners, assessors, surveyors, treasurers and sheriffs must file, as do planning commission members and the county's principal administrator.
- **Cities:** All elected officials, the city manager or principal administrator, municipal judges and planning commission members.
- **Districts:** Administrative and financial officers in school districts, education service districts and community college districts. Some members of the board of directors for certain special districts. **New 2023:** all school board members of each common and union high school district.
- **Candidates:** Individuals running for some elected public offices are also required to file.

JURISDICTIONAL CONTACT

OGEC staff has identified the positions held by public officials who must file the SEI form and has them listed in the Electronic Filing System (EFS) by jurisdiction. Each jurisdiction [city, county, executive department, board or commission, etc.] has designated a person who acts as the Commission's point of contact for that jurisdiction. [OAR 199-020-0005(1)]

This contact person is known as the **Jurisdictional Contact (JC)**. It is through the JC that OGEC obtains the name and email address of each public official who is required to file. When there is a change, through resignation, appointment or election, in who holds a position, the **JC** makes the necessary changes in the EFS.

Please Note: If there is a change in the SEI filer's email address or other contact information, it is the **SEI filer's responsibility** to make the change in their personal account - not the responsibility of the JC.

As with other provisions in Oregon Government Ethics law, it is each public official's personal responsibility to ensure they comply with the requirement to complete and submit the SEI form by April 15th.

GETTING STARTED

Each jurisdiction has a designated person, a Jurisdictional Contact (JC), whose responsibility is to keep the OGE database (Electronic Filing System, EFS) up to date with the names of the public officials serving in specific roles. Once the JC has added you to the EFS, you will receive an email invitation to create your account.


NOTE: The link in the email is only active for 90 days. If your link is not active, please contact your JC to get receive a new link.

You will only need one account, even if you have multiple roles or seat assignments in the EFS. If you serve in multiple roles that require filing an SEI, your positions will be listed in your personal account profile you have set-up. If you already have an account and are being assigned to a new seat, it is important that the JC for your new role has the email associated with your existing account. You will only need to file one SEI each year, even if you have multiple positions that require you to file.

NOTE: If you are both a JC and a filer, you will have two separate accounts.

CREATING YOUR ACCOUNT

1. Locate the system-generated email from the Oregon Government Ethics Commission: ogec.notification@egov.com
2. Locate the email link within the email.



Dear Stephanie Trainer:

You are being invited to create a personal account in the Oregon Government Ethics Commission's (Commission) Electronic Filing System (EFS) to prepare for the required filing of the Statement of Economic Interest. ORS 244.050 specifically identifies certain public officials who are required to complete and file the Annual Verified Statement of Economic Interest (SEI) form. AMITY SD 4J has indicated that you currently hold a public position that is required to file.

All filings are submitted electronically through the EFS and require that you have an active account. Notifications for the filing are sent from ogec.notifications@egov.com, and are sent to the email address that you provide in your account. You can provide your personal email account as it is not public record. Using an email that you check regularly is imperative. On March 15th you will be contacted via email to file your report and you have until April 15th to complete the filing.

Please click on the following link to create your account now. <https://gcc02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fuat-oregon.egov.com%2F%2FOGEC%2FEFS%2FSEI%2FAccount%2FSEI%2FInvite%3FconfirmationCode%3DABBJU9&data=05%7C01%7C0GEC.Training%40ogec.oregon.gov%7C8fdb1910f72a4b6554fd08dac68cf394%7Caa3f6932fa7c47b4a0cea598cad161cf%7C0%7C0%7C638040605928751531%7CUnknown%7CTWFpbGZsb3d8eyJWljoimC4wLjAwMDAILCjQjoiV2luMzIiLCJBTiI6Ii1haWwILCjXVCI6Mn0%3D%7C3000%7C%7C&data=AA5lyxmYaevXT3Rj7RcaK5jP%2F%2ByHg17CbYI%2FTRGzkc0%3D&reserved=0>

If you have a pre-existing account created in EFS, please contact Commission staff for assistance.

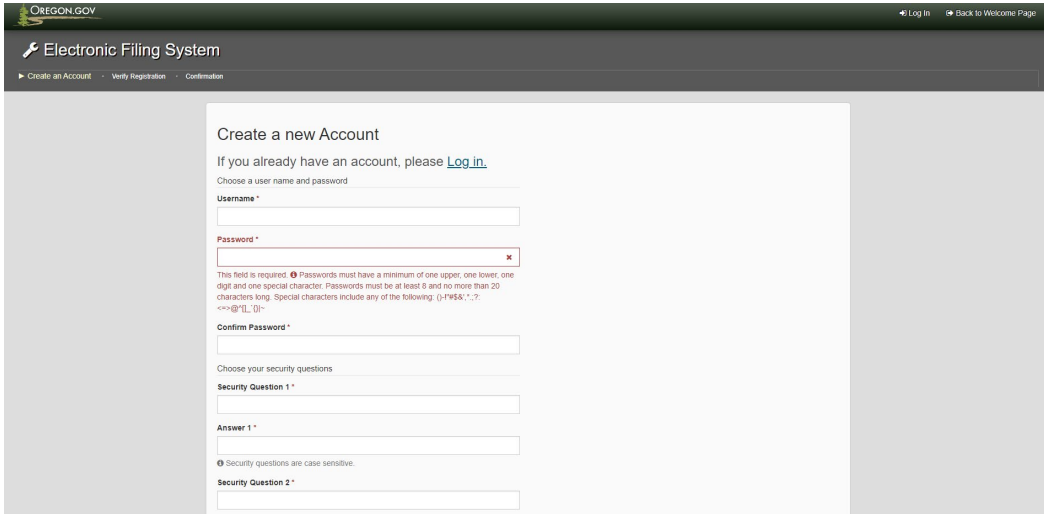
For helpful training opportunities and materials for filing your SEI, click here: <https://www.oregon.gov/ogec/training/pages/default.aspx>.

Contact the Commission staff with questions or concerns at 503-378-5105 or by email at mail@ogec.oregon.gov. We are always happy to help.

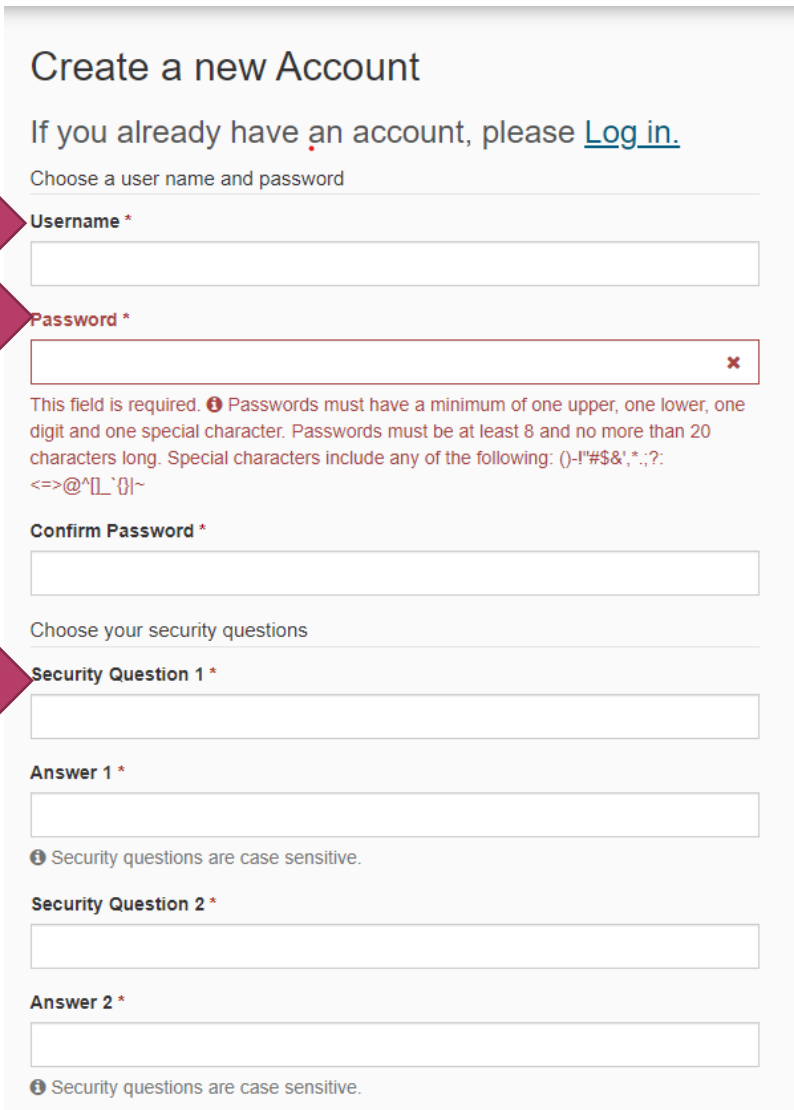
Do not reply to this email notification as it will not be delivered to the Commission.

Thank you,
Oregon Government Ethics Commission
3218 Pringle Rd SE, Ste 220
Salem OR 97302

3. Click on the link or copy the link into your web browser address bar. This will direct you to the "Create a New Account" page of EFS.



Make sure to complete all fields. Many of the fields are prepopulated with information provided by the JC during the seat/position assignment process.



4. **Select Username.**

Choose your username carefully, as the username field is permanent. The use of an email address as a username is **NOT** recommended.

5. **Select a password.** Passwords must have a minimum of:

- ✓ One upper case letter
- ✓ One lower case letter
- ✓ One numerical digit
- ✓ One special character (*See text help for special character list*)
- ✓ Must be at least 8 and not more than 20 characters long

NOTE: We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.

6. **Security Questions.** Security questions enable you to retrieve your password if you are unable to remember it. The security question answers are **case and space sensitive**. If your security question answer contains more than a one word answer, you will need to remember to include all spaces, punctuation, special characters, etc. that you used.

7. **Personal Profile Information.**

Verify that the pre-populated personal profile information is correct. It is your responsibility as a SEI filer to maintain your own profile information, which includes mailing address, phone number and most importantly, the email address.

Security questions are case sensitive.

Personal Profile Information

Last Name *

First Name *

Middle Name

Email *

Phone *

Alternate Phone

Fax

Mailing Address *

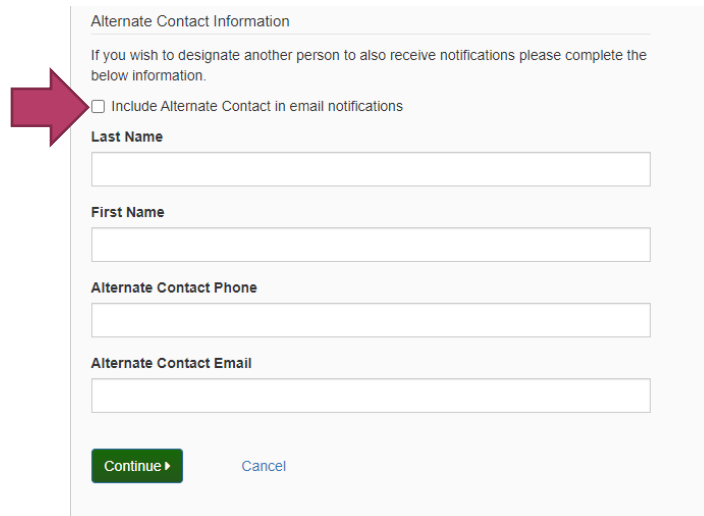
Address Line 2

City * State * Zip Code *

OR

8. **Alternate Contact Information.** You have the option to identify an alternate contact person to receive the same system-generated email notifications that you will receive. It is recommended that you list your JC as an alternate contact.

FIRST: Be sure to check the box to include the designated alternate contact in email notifications. Then you can enter the contact's information. If you do not check the box first, they will not receive copies of the emails.



Alternate Contact Information

If you wish to designate another person to also receive notifications please complete the below information.

Include Alternate Contact in email notifications

Last Name

First Name

Alternate Contact Phone

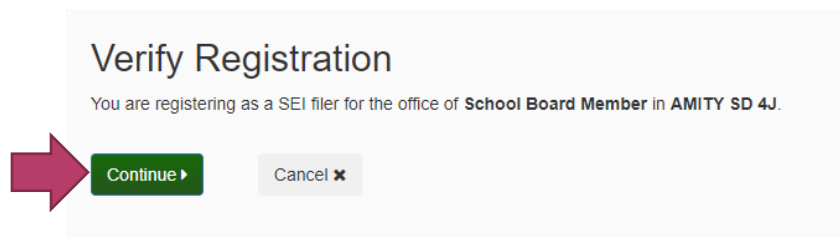
Alternate Contact Email

Continue ▶ Cancel

9. After confirming all information is correct, select **CONTINUE**.

10. **Verify Registration.**

You will now be asked to verify your personal profile information. Select **CONTINUE**.



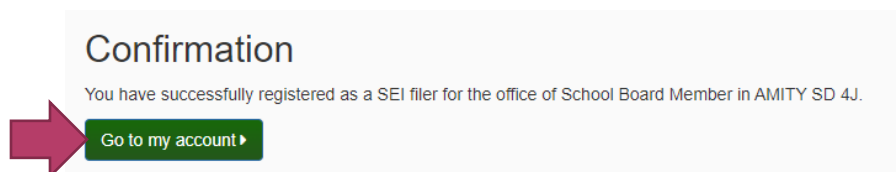
Verify Registration

You are registering as a SEI filer for the office of **School Board Member** in **AMITY SD 4J**.

Continue ▶ Cancel ✕

11. **Confirmation.**

If you have successfully registered, the **CONFIRMATION** page will appear naming the jurisdiction you have registered for. You will receive a system-generated email confirming that you have successfully registered.



Confirmation

You have successfully registered as a SEI filer for the office of School Board Member in AMITY SD 4J.

Go to my account ▶

12. Once you have created your personal profile, you will now select **GO TO MY ACCOUNT** to view your account.

REGISTRATION CODE/ TOKEN ID

If you are unable to locate the system-generated email from the Oregon Government Ethics Commission: ogec.notification@egov.com, please contact your JC. Your JC can provide you with the registration code (also known as the Token ID).

Please confirm that they entered your email address correctly before using the registration code. If the JC has not entered your email address correctly, they will need to delete your invitation and re-seat you. This will generate a new email invitation and registration code.

1. Once you have gotten the registration code/token ID from your JC, go to the EFS login page.

OREGON.GOV

Log In Back to Welcome Page

Electronic Filing System
Oregon Government Ethics Commission - Sign In

Please Login or Sign Up To Register or File Reports

Account Login

Username *

Password *

Forgot Username?

Forgot Password?

New user?

Create an account

Log In

Password is required.

Oregon Government Ethics Commission
3218 Pringle Road SE, Room 2201 Salem, OR 97302-1544
Email: mail@ogec.oregon.gov | Phone: (503) 378-5105

[Oregon.gov](#) [Accessibility](#) [Privacy Policy](#)

2. Click on the blue “Create an account” button.
3. **Choose a role.** Click on the green box labeled “Statement of Economic Interest (SEI) Filer”



Choose a Role



4. **Registration Code.** You can now enter the registration code (shown as the Invite Token ID in the JC's account).

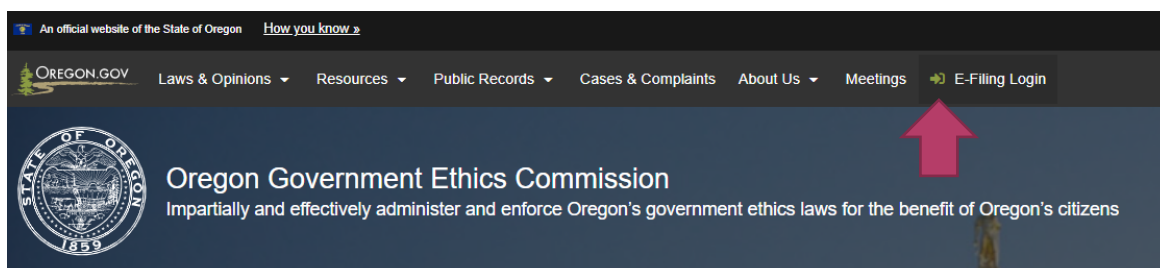
The screenshot shows a form titled 'Enter Registration Code' with a close button (X) in the top right. Below the title is the instruction: 'Please enter the registration code that you received in the email invitation.' There is a text input field labeled 'Registration Code'. At the bottom of the form are two buttons: a green 'Continue Registration' button with a right-pointing arrow, and a white 'Cancel' button with a close icon (X).

5. You will be taken to the **Create a new Account** screen. Please follow the instructions above.

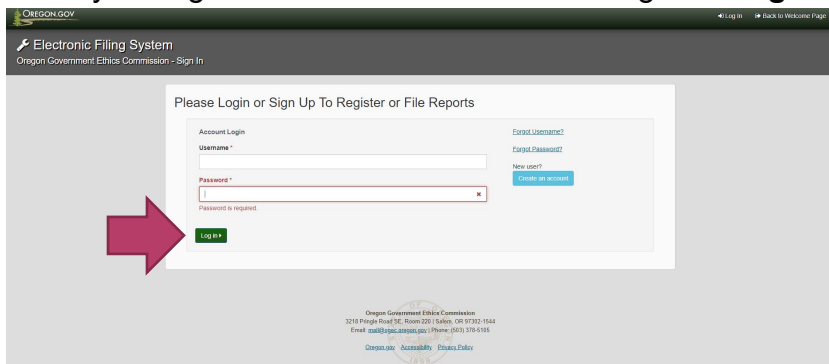
MANAGING YOUR EFS ACCOUNT

LOGIN

1. Go to OGEC's website www.oregon.gov/ogec
2. Click on E-Filing Login at the top right of the screen



- You will be re-directed to the Electronic Filing System (EFS) login page
- Enter your login information and click on the green **Log in** button.



- Choose Role.** Select your role. Available roles have a green checkmark. Roles that may be added have a blue plus mark.

Select the **Statement of Economic Interest (SEI) Filer** role to get to the SEI dashboard.



DASHBOARD

The Dashboard provides access to your SEI, any **Documents** uploaded to support your SEI, and all email **Communications** sent by the EFS.

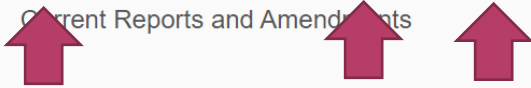
Your role is currently set as *SEI Filer*.

Your report status is **CURRENT**

Current Positions Held:

- **School Board Member, AMITY SD 4J** - Appointed 11/8/2022

Reports Penalties & Sanctions (0) Documents Communications



Current Reports and Amendments

Search [] [Refresh] 10 [] [List Icon]

Year	Confirmation Number	Filing Date	Documents	Status	Commands
No results found!					

« < 1 > »

Showing 0 to 0 of 0 entries

+ File a New Report

If you hold other roles, you will have a separate dashboard for each of those roles.

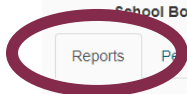
1. Navigate between views, i.e. Reports, Documents and Communications, of your dashboard by clicking on the tab names. The default view will be the **Reports** tab.

Your role is currently set as *SEI Filer*.

Your report status is **CURRENT**

Current Positions Held:

- **School Board Member, AMITY SD 4J** - Appointed 11/8/2022



Reports Penalties & Sanctions (0) Documents Communications

Current Reports and Amendments

Search [] [Refresh] 10 [] [List Icon]

Year	Confirmation Number	Filing Date	Documents	Status	Commands
No results found!					

« < 1 > »

Showing 0 to 0 of 0 entries

+ File a New Report

2. Email notices sent by the EFS can be viewed in the **Communications** tab. Click on the **Subject** link to view the text of the communication.

Your role is currently set as *SEI Filer*.

Your report status is **CURRENT**

Current Positions Held:

- School Board Member, AMITY SD 4J - Appointed 11/8/2022

Reports Penalties & Sanctions (0) Documents **Communications**

Communication History

Q Search [Refresh] 10 [List]

Date/Time Sent	Sender	Subject
11/14/2022 - 02:09:46 pm	Admin	SEI Filer Invitation to Create Account

« < 1 > » Showing 1 to 1 of 1 entries

3. **Documents** are anything provided to the agency as part of your report filing. If the system does not allow you to directly upload your required documents you will need to electronically send them to the Commission at: mail@ogec.oregon.gov noting the SEI filer name, jurisdiction, report year, and a request that the document be attached to your filing. The OGEC Administrator will then attach the document to the filed report. Documents may be viewed through the **Documents** tab.

Your role is currently set as *SEI Filer*.

Your report status is **CURRENT**

Current Positions Held:

- School Board Member, AMITY SD 4J - Appointed 11/8/2022

Reports Penalties & Sanctions (0) **Documents** Communications

View Uploaded Documents

Q Search [Refresh] 10 [List]

Associated Filing	Title	Date Uploaded
No results found!		

FORGOT PASSWORD

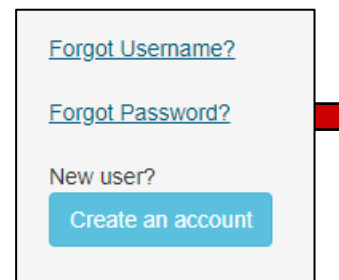
Contact OGEC staff at: 503-378-5105 / mail@ogec.oregon.gov to request a password reset. You will then be able to change your password and update the security questions on your account.

OR

1. From EFS login page, select the **Forgot Password?** navigation link.

2. **Forgot Your Password** window displays.

3. **Enter your username.** Select 



4. **Answer security questions.** Security question answers are case and space sensitive.

NOTE: If your security question answer contains more than one word, you will need to remember to include all spaces, punctuation, special characters, etc. that you used.

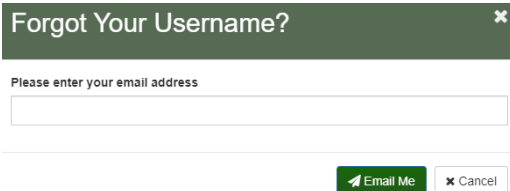
5. **Select a new password.** Passwords are case sensitive and must contain at least:
- a. 8 characters
 - b. one upper case letter
 - c. one lower case letter
 - d. one number
 - e. one special character

NOTE: We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.

FORGOT USERNAME

1. From EFS login page, select the **Forgot Username?** navigation link.

2. In the **Forgot Your Username?** pop-up, enter your email address and click on **Email Me.**



3. You will be routed back to the login page. A system-generated message will appear in the body of the page. The message should read: **“We found an account for, (*your email address*). An email will be sent to that address.”**

4. The system will generate an email from ogec.notification@egov.com. It will list all of the usernames associated with the email address used.

5. Any questions or issues, please contact OGEC staff.

EDITING/UPDATING ACCOUNT INFORMATION

It is your responsibility to keep your personal information, such as mailing address or email address, current in your EFS account.

NOTE: You can edit only your own personal profile information. You cannot substitute another individual to your assignment or to maintain your profile information.

1. Click on the down arrow next to the **Welcome, First Name Last Name (SEI)** line on the upper right hand side of the screen.

OREGON.GOV

Welcome, Stephanie Trainer (SEI)

Electronic Filing System
Oregon Government Ethics Commission - Documents

Your role is currently set as *SEI Filer*.

Your report status is **CURRENT**

Current Positions Held:

- School Board Member, AMITY SD 4J - Appointed 11/8/2022

Reports Penalties & Sanctions Documents Communications

Current Reports and Amendments

Search 10

Year	Confirmation Number	Filing Date	Documents	Status	Commands
No results found!					

Showing 0 to 0 of 0 entries

File a New Report

Oregon Government Ethics Commission
3218 Pringle Road SE, Room 220 | Salem, OR 97302-1544
Email: mail@ogec.oregon.gov | Phone: (503) 378-5105
Oregon.gov [Accessibility](#) [Privacy Policy](#)

2. A drop down menu will appear. Click on **Edit My Profile**.

OREGON.GOV

Welcome, Stephanie Trainer (SEI)

Electronic Filing System
Oregon Government Ethics Commission - Documents

Your role is currently set as *SEI Filer*.

Your report status is **CURRENT**

Current Positions Held:

- School Board Member, AMITY SD 4J - Appointed 11/8/2022

Reports Penalties & Sanctions Documents Communications

View Uploaded Documents

Search 10

Associated Filing	Title	Date Uploaded
No results found!		

Account Home
Edit My Profile
Switch Roles
Log Out

Oregon Government Ethics Commission
3218 Pringle Road SE, Room 220 | Salem, OR 97302-1544
Email: mail@ogec.oregon.gov | Phone: (503) 378-5105
Oregon.gov [Accessibility](#) [Privacy Policy](#)

UPDATING CONTACT INFORMATION

3. In **My Profile** click on the **Edit** next to **Personal Profile Information**.

The screenshot shows the 'My Profile' page for Stephanie Heffner. The page title is 'My Profile (sheffner, Admin)'. There is a green 'Request Name Change' button in the top right. The main content area lists several sections with 'Edit' links: Personal Profile Information, Alternate Contact Information, Password, Security Questions, SEI Seat History, Audit Log, and Admin Notes. At the bottom left of this section is a 'Save and Return' button. The footer contains the Oregon Government Ethics Commission contact information: 3218 Pringle Road SE, Room 220 | Salem, OR 97302-1544, Email: mail@ogec.oregon.gov | Phone: (503) 378-5105.

4. **Update your profile information.** Please make sure your name, email, phone number, and mailing address are correct. You will only be able to update your email, phone number, and mailing address. If you need a name change, please contact OGEC.

NOTE: You will only be able to update your email, phone number, and mailing address. If you need a name change, please contact OGEC or click on the green **Request Name Change** button.

The screenshot shows the 'My Profile' page with the 'Personal Profile Information' form expanded. A red arrow and a circled '4' point to the form. The form fields are: Last Name (Heffner), First Name (Stephanie), Middle Name, Email (stephanie.heffner@oregon.gov), Phone (503-378-6802), Alternate Phone, Fax, Mailing Address (3218 Pringle Rd SE, #220), Address Line 2 (Example: "1234 Anywhere St"), City (Salem), State (OR), and Zip Code (97302-1680). A green 'Request Name Change' button is visible in the top right.

UPDATING PASSWORD

5. **Passwords** must have a minimum of:

- ✓ One upper case letter
- ✓ One lower case letter
- ✓ One numerical digit
- ✓ One special character (*See text help for special character list*)
- ✓ Must be at least 8 and not more than 20 characters long

NOTE: We recommend that you do not use an exclamation mark (!) as one of your special characters. This sometimes causes login errors.

The screenshot shows a user profile update interface. On the left, a vertical sidebar contains a list of menu items: 'Alternate Contact Information (Edit)', 'Password (Edit)', 'Security Questions (Edit)', 'SEI Seat History (Edit)', 'Audit Log (View)', and 'Admin Notes (Edit)'. A red arrow points from the number '5' in a black circle to the 'Password (Edit)' link. Below the menu items, a 'Save and Return' button is highlighted with a red arrow and the number '8' in a black circle. At the bottom of the page, there is a footer for the Oregon Government Ethics Commission, including the address '3218 Pringle Road SE, Room 220 | Salem, OR 97302-1544', email 'mail@ogec.oregon.gov', phone '(503) 376-5105', and links for 'Oregon.gov', 'Accessibility', and 'Privacy Policy'.

UPDATING SECURITY QUESTIONS

6. **Security Questions.** These are used for password retrieval purposes. The security questions are **case and space sensitive**. If your security question answer contains more than one word, you will need to remember to include all spaces, punctuation, special characters, etc. that you used.

UPDATING ALTERNATE CONTACT

7. **Alternate Contact Information.** You have the option to identify an alternate contact person to receive the same system-generated email notifications that you will receive.

The Alternate Contact will only receive copies of your notices. They will not receive any links, nor will they be able to login to your account.

FIRST: Be sure to check the box to include the designated alternate contact in email notifications. Then you can enter the contact's information. If you do not check the box first, they will not receive copies of the emails.

Alternate Contact Information

If you wish to designate another person to also receive notifications please complete the below information.

Include Alternate Contact in email notifications

Last Name

Spears ✓

First Name

Joanne ✓

Alternate Contact Phone

503-123-4567 x8910 ✓

Alternate Contact Email

monica.walker@ogec.oregon.gov ✓

It is recommended that you list an alternate contact to ensure that important dates are not missed, and tasks are completed on time.

SAVE CHANGES

8. **Save and Return.** Click on this green button when you have finished updating your account information.

The screenshot shows a user interface for account settings. On the left, a vertical menu contains several options: 'Alternate Contact Information (Edit)', 'Password (Edit)', 'Security Questions (Edit)', 'SEI Seat History (Edit)', 'Audit Log (View)', and 'Admin Notes (Edit)'. A red circle with the number '8' and a red arrow points to the 'Save and Return' button at the bottom of the menu. The 'Save and Return' button is green with white text, and a 'Cancel' button is next to it. At the bottom of the page, there is a footer for the Oregon Government Ethics Commission, including the address '3218 Pringle Road SE, Room 220 | Salem, OR 97302-1544', email 'mail@ogec.oregon.gov', phone '(503) 378-5105', and links for 'Oregon.gov', 'Accessibility', and 'Privacy Policy'. A seal with the year '1859' is also visible.

DATE OF APPOINTMENT

The JC enters the date of appointment information when inviting you to create an account profile. If you believe that it is incorrect, contact the JC for your jurisdiction and ask them to make the correction.

Because EFS started in 2016, no one will have an appointment date prior to 2016.

All school board members will have an appointment date of 1/1/2023 or later.

RESIGNING FROM POSITION

Contact the Jurisdictional Contact (JC) assigned to the jurisdiction(s) in which you are elected or appointed by and advise them of your resignation.

You will not have the option of resigning and removing yourself in the EFS.

If you hold the position and are seated on April 15th of the required filing period, you will be responsible for filing the required SEI report for that year.

Example: If you held a position anytime during the period of April 16th of the previous year through April 15th of the current year, you would be required to file the annual SEI report. However, if you resigned and vacated your position on or before April 14th of the current year, you would not have a SEI filing requirement.

Once the Jurisdictional Contact has removed you from the assigned position, you will receive a system-generated email advising you of this action.

FILING AN SEI

SEIs are filed annually. The due date is April 15th of every year.

The reporting period opens March 15th. If you have a SEI reporting requirement, you will receive an email notice from EFS sent to the email address you have on file in your account to let you know the filing period has opened.

If you do not hold the office on April 15th of the current year, and the JC has removed/vacated you from the seat assignment prior to April 15th, you will not have a requirement to file an SEI report.

NOTE: You may be precluded from filing based on the appointment date entered by the JC when the registration/account was created. The system will determine if there is a filing requirement and make the option available. If there is no filing requirement, the option to file will not be available.

1. **Login.** Login to EFS at: <https://apps.oregon.gov/OGEC/EFS>
2. **Choose a Role.** Select the “Statement of Economic Interest (SEI) Filer” role.

FILING TIPS

1. To answer each question on the report, click the **Add an Item** button. You may enter as many items as necessary. Each new row will be added to your report independently. Some questions may have multiple sections, each section will require information to be added separately. See below Question 1A and 1B.

1. BUSINESS OFFICE OR DIRECTORSHIP; BUSINESS NAME:

Check here for none

A. If you or a member of your household were an officer or director of a business during 2021, please indicate that information below.

Business Name	Address Line	City	State	ZIP	Description of Business	Title of Office	Held by Whom	Edit	Delete
No Data to Report									

+Add an Item

Check here for none

B. List the names under which you or members of your household did business during 2021.

Business Name	Address Line	City	State	ZIP	Description of Business	Held by Whom	Edit	Delete
No Data to Report								

+Add an Item

2. **Nothing to report.** If you have nothing to report for a section, select the “**Check here for none**” checkbox. If the question has multiple sections, and you have nothing to report, you will need to select the “**Check here for none**” boxes for each section.

1. BUSINESS OFFICE OR DIRECTORSHIP; BUSINESS NAME:

Check here for none

A. If you or a member of your household were an officer or director of a business during 2021, please indicate that information below.

Business Name	Address Line	City	State	ZIP	Description of Business	Title of Office	Held by Whom	Edit	Delete
No Data to Report									

+Add an Item

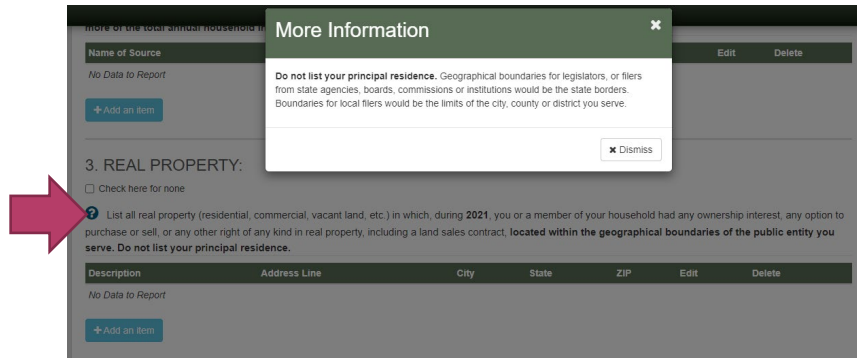
Check here for none

B. List the names under which you or members of your household did business during 2021.

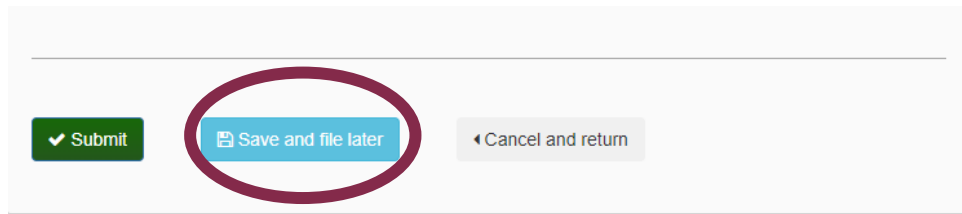
Business Name	Address Line	City	State	ZIP	Description of Business	Held by Whom	Edit	Delete
No Data to Report								


+Add an Item

3. For additional help on any section of the form, select the icon and a pop-up window will open with additional information.





- If you must stop before completing the form, and would like to return to file later, scroll to the bottom and select **Save and file later**. The system does time out after a period of inactivity and **does not automatically save**. If you step away from filing, please make sure to save so you do not lose your completed answers.



- When you save the report, you will see it display with a **Pending** status in the **Reports** tab of the dashboard. You may edit the saved report at any time by selecting the **edit icon** -  in the row the report is in.

Current Reports and Amendments

Year	Confirmation Number	Filing Date	Documents	Status	Commands
2021	AMT67T5		No	Pending	 

NOTE: Completed reports are due by April 15th. A Pending report will not qualify as a completed and filed SEI report.

QUESTION 1: BUSINESS OFFICE OR DIRECTORSHIP; BUSINESS NAME:

SEI filers are required to list any businesses in which they or a member of their household maintained a position as an officer or director during the preceding calendar year.

- These would be personal business ventures, not the public position you hold.

- A business is not a government entity/public body, or a 501(c)(3) nonprofit corporation if you are in a non-compensated capacity.

A. If you or a member of your household were an officer or director of a business (see definition of "business") during 2022, please indicate that information below.

You will list the:

1. **Business Name**
2. **Title of Office**
3. **Business Address**
4. **Held by Whom**
5. **Description of the Business**

If you have nothing to report, click the box **Check here for none**.

B. List the names under which you or members of your household did business (see definition of "business") during 2022:

- Items A and B may be the same and Item B may be subsidiary of parent company listed in Item A. [ORS 244.060(1) & (2)]

You will list the:

1. **Business Name**
2. **Title of Office**
3. **Business Address**
4. **Held by Whom**
5. **Description of the Business.**

If you have nothing to report, click the box **Check here for none**.

QUESTION 2: SOURCES OF INCOME

SEI filers are required to list all sources of income (not the amount of income) that made up 10% or more of their total annual household income in 2022. This includes any household member who is 18 years of age or over. [ORS 244.060(3)]

- Businesses are sources of income, not the individual clients of the business.
- Do not leave this question unanswered. Everyone should have some source of income from an employer, a business, Social Security benefits, retirement benefits, Veteran benefits, etc.

You will list:

1. **Name of the Source**
2. **Address of the Source**
3. **Description of the Source**

Examples:

Salem Hospital; 1234 Oak St., Salem OR; Husband's salary

ABC LLC; 1234 Pine St, Medford OR; Rental Property income

QUESTION 3: REAL PROPERTY

List all real property (*residential, commercial, vacant land, etc.*) located within the geographical boundaries of the jurisdiction you serve, **other than your principal residence**, in which you the SEI filer or your household member had any ownership interest, any option to purchase or sell, or any other right of any kind in real property, including a land sales contract in 2022. [ORS 244.060(4)]

- Boundaries for legislators, or filers from state agencies, boards, commissions or institutions would be the state borders. Boundaries for local filers would be the limits of the city, county or district you serve.

You will list:

1. **Description of the real property**
2. **Address**

- Examples of real property descriptions: Rental property, farmland, vacant land, vacation home, etc.

If you have nothing to report, click the box **Check here for none**.

QUESTION 4: OFFICE RELATED EVENTS

SEI filers are required to list the amount of any expenses with an aggregate value exceeding \$50 that were paid by a source other than the jurisdiction they serve during the preceding calendar year.

- A.** List the amount of any expenses with an aggregate value exceeding \$50 provided to you during **2022**, where the expenses were paid by a government entity, Native American tribe, membership organization or nonprofit organization where the public official was participant in a convention, mission, trip, or other meeting as described in ORS 244.020(7)(b)(F), which is an exception to gift restrictions. [ORS 244.060(5)]

- Do not list expenses that were paid by the public body you represented.
- This is one of the two instances in which the SEI filer is required to upload a receipt to their annual SEI. The paying entity should provide the public official a receipt of the costs within 10 days of the date that the expense occurred. [ORS 244.100]. You will have the opportunity to upload the document at the end of the SEI.

You will list:

1. **Date(s) of Event**
2. **Organization Name** (who paid for the expenses)
3. **Address**
4. **Nature of Event**
5. **Amount** (as listed in the receipt)

If you have nothing to report, click the box **Check here for none**.

B. List the amount of any expenses with an aggregate value exceeding \$50 provided to you during 2022 when participating in a mission, negotiations, or economic development activities described in ORS 244.020(7)(b)(H), which is an exception to the gift restrictions. [ORS 244.060(6)]

- These events are those that were officially sanctioned or designated by your public body.
- Do not list expenses that were paid by the public body you represented.)

You will list:

1. **Date(s) of Event**
2. **Organization Name** (who paid for the expenses)
3. **Address**
4. **Nature of Event**
5. **Amount**

If you have nothing to report, click the box **Check here for none**.

QUESTION 5: HONORARIA

List all honoraria (*see definition*) allowed in ORS 244.042, with a value exceeding \$15, received by you or a member of your household during 2022. [ORS 244.060(7)]

You will list:

1. **Date**
2. **Organization Name**
3. **Nature of Event**
4. **Amount**

Under ORS 244.100(2) any person that provides a public official or candidate, or a member of the household of the public official or candidate, with an honorarium or other item allowed under ORS 244.042 with a value exceeding \$15 shall notify the public official or candidate in writing of the value of the honorarium or other item. The person shall provide the notice to the public official or candidate within 10 days after the date of the event for which the honorarium or other item was received.

- This is the second of the two instances in which the SEI filer is required to upload a receipt to their annual SEI. You will have the opportunity to upload the document at the end of the SEI.

If you have nothing to report, click the box **Check here for none**.

QUESTION 6: SHARED BUSINESS WITH LOBBYIST

List the name of any compensated lobbyist who was associated with a business with which you or a member of your household was also associated during 2022. If any business or sources of income from questions one and two paid a lobbyist registered in Oregon, the SEI filer would list those businesses here. [ORS 244.090(1)]

- Owning stock in a publicly traded company in which the lobbyist also owns stock is not a relationship that requires disclosure.
- *Example: The public official or household member is an employee or owner of a private company that also employs a lobbyist.*

You will list:

1. **Name of the Lobbyist**
2. **Name of the Business**
3. **Type of the Business**

If you have nothing to report, click the box **Check here for none**.

PLEASE NOTE – DO NOT answer items 7, 8, 9, and 10 unless the source of the interest is derived from an individual or business that has a legislative or administrative interest or that has been doing business, does business or could reasonably be expected to do business with the governmental agency of which you hold an official position or over which you exercise any authority.

"Legislative or administrative interest" means an economic interest, distinct from that of the general public in any matter subject to the decision or vote of the public official acting in the public official's capacity as a public official.

QUESTION 7: INCOME OF \$1,000 OR MORE

Respond only if you or a member of your household received a source of income exceeding an aggregate amount of \$1,000 during 2022, and that income was derived from an individual or business that has been doing business, does business, or could reasonably be expected to do business with, or has a legislative or administrative interest in the governmental body you serve. [ORS 244.060(8)]

You will list:

- 1. Income Source**
- 2. Address**
- 3. Description**

If you have nothing to report, click the box **Check here for none.**

QUESTION 8: DEBT OF \$1,000 OR MORE

Respond only if you or a member of your household owed a debt of \$1,000 or more to a person (*see definition of "person"*) during 2022, and that debt involved an individual or business that did business with, or reasonably could be expected to do business with, or had a legislative or administrative interest in the public body you serve. [ORS 244.070(1)]

- Do not list loans from state or federally regulated financial institutions (banks, etc.) or retail credit accounts and do not list the amounts owed.

You will list:

- 1. Name of Creditor**
- 2. Date of Loan**
- 3. Interest Rate of Loan**

If you have nothing to report, click the box **Check here for none.**

QUESTION 9: BUSINESS INVESTMENT OF \$1,000 OR MORE

Respond only if you or a member of your household had a personal, beneficial interest or investment in a business (*see definition of "business"*) of more than \$1,000 during 2022, if the investment involved an individual or business that did business with or reasonably could be expected to do business with or had a legislative or administrative interest in the public body you serve. [ORS 244.070(2)]

- Do not list the amount of the investment.
- Do not list individual items in a mutual fund or blind trust, or a time or demand deposit in a financial institution, shares in a credit union, or the cash surrender value of life insurance.

You will list:

1. **Business Name**
2. **Address**
3. **Description of the Business**

If you have nothing to report, click the box **Check here for none**.

QUESTION 10: SERVICE FEE OF \$1,000 OR MORE

Respond **only if you** (not your business) received a fee of more than \$1,000 in 2022 from a person (see definition of "person") for whom you performed a service, if the service involved an individual or business that did business with, or reasonably could be expected to do business with, or had a legislative or administrative interest in the public body you serve. [ORS 244.070(3)]

- Do not list fees if you are prohibited from doing so by law or a professional code of ethics.

If you have nothing to report, click the box **Check here for none**.

VERIFY AND SAVE


1. **Supporting Documentation:** Uploading your files

Only questions 4A. Office Related Events and 5. Honoraria require documentation to be uploaded.

Upload Notices provided to Public Officials

Supporting Documentation

Please upload your supporting documentation in the form of .JPG, .JPEG, .PNG, .GIF, .PDF, .DOC, or .DOCX. Max file size is 100 MB



Upload your files

Choose files to upload. You can select more than one file at a time. You can also **drag and drop** files anywhere in this block to start uploading.

My Uploads

Name	Size	Status	Remove

Click on “Choose Files” to select files saved to your device to attach or you can drag and drop files to upload.


If the system does not allow you to directly upload your required documents you will need to electronically send them to the Commission at: mail@ogec.oregon.gov noting the SEI filer name, jurisdiction, report year, and a request that the document be attached to your filing. The OGEC Administrator will then attach the document to the filed report. Once uploaded, the documents may be viewed through the **Documents** tab.

2. **Submit:** When the form is complete, select **Submit**.

Upload Notices provided to Public Officials

Supporting Documentation

Please upload your supporting documentation in the form of .JPG, .JPEG, .PNG, .GIF, .PDF, .DOC, or .DOCX. Max file size is 100 MB



Upload your files

Choose files to upload. You can select more than one file at a time. You can also **drag and drop** files anywhere in this block to start uploading.

My Uploads

Name	Size	Status	Remove

3. **Electronic Signature.** You will be prompted to sign your name to complete the filing. Type your first and last name as it appears in your personal profile (it is displayed on the upper right hand side of your screen). Click **Confirmed** then select **File Report**.

- The **Report Successfully Filed** screen will appear. If you do not see this prompt, the system may return you to the portion of the report that needs more information. Once corrected, you can successfully file. If you complete a **Pending** report, you will see the status has change from **Pending** to **Filed** in the **Reports** tab of the dashboard.

NOTE: The **filing deadline is always April 15th**, even if that date falls on a weekend or holiday. The electronic filing system is available 24-hours a day and 7 days a week for your convenience.

MOST COMMON FILING ERRORS

- Failing to list all sources of household income for question 2. All sources of income exceeding 10% of the total annual **household** income must be listed. *(The question includes the public position you hold.)* Do not overlook the fact that a pension or

social security benefit represents part of the household income. Please refer to the definition of income on page 3.

2. Completing items 7 to 10 when not necessary. Please carefully read the instructions in the box. The questions need to be answered only if the conditions described in the instructions apply to your responses.
- **Please do not fail to respond to the email notification!** ORS 244.350(4)(c) prescribes assessment of a penalty of \$10.00 for each of the first 14 days the SEI is late and \$50.00 for each day thereafter that passes after the filing deadline date, up to a maximum of \$5,000.00.
 - You are required to electronically file **no later than April 15**. Please contact OGEC if you have questions.

STATUTORY REFERENCES

Item 4-A, ORS 244.020(7)(b)(F) – Reasonable expenses paid by any unit of the federal government, a state or local government, a Native American tribe that is recognized by federal law or formally acknowledged by a state, a membership organization to which a public body as defined in ORS 174.109 pays membership dues or a not-for-profit corporation that is tax exempt under section 501(c)(3) of the Internal Revenue Code, for attendance at a convention, fact-finding mission or trip, conference or other meeting if the public official is scheduled to deliver a speech, make a presentation, participate on a panel or represent state government as defined in ORS 174.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

Item 4-B, ORS 244.020(7)(b)(H) – Reasonable food, travel or lodging expenses provided to a public official, a relative of the public official accompanying the public official, a member of the household of the public official accompanying the public official or a staff member of the public official accompanying the public official, when the public official is representing state government as defined in ORS 174.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

(i) On an officially sanctioned trade promotion or fact-finding mission; or

(ii) In officially designated negotiations, or economic development activities, where receipt of the expenses is approved in advance.

DEFINITIONS

"Business" means any corporation, partnership, proprietorship, firm, enterprise, franchise, association, organization, self-employed individual and any other legal entity operated for economic gain. This does not include income-producing not-for-profit corporations that are tax-exempt under section 501(c) of the Internal Revenue Code with which a public official or relative of a public official is associated in a non-compensated capacity. [ORS 244.020(2)]

"Income" means income of any nature derived from any source, including but not limited to any salary, wage, advance, payment, dividend, interest, rent, honorarium, return of capital, forgiveness of indebtedness, retirement income, real estate transactions, inheritance income, or anything of economic value received as income including income from government sources (i.e., social security, your public salary, etc.). [ORS 244.020(9)]

"Honorarium" means a payment or something of economic value given to a public official in exchange for services upon which custom or propriety prevents the setting of a price. Services include, but are not limited to, speeches or other services rendered in connection with an event. [ORS 244.020(8)]

"Person" means, for purposes of this form, (a) the public official required to file a Statement of Economic Interest and (b) an individual, corporation, partnership, joint venture, and any other similar organization or association.

"Member of Household" means any person who resides with the public official. [ORS 244.020(11)]

FAQS

Once logged in to the account, do the sessions time out?

Yes. The session will time out after a 15 minute period of inactivity.

Can filers file a paper Statement of Economic Interest (SEI)?

No. Since 2016, all required filers must file electronically.

Can anyone get a password to file electronically?

No. Only those statutorily identified as required filers who have been assigned to a seat in the system can access the Electronic Filing System (EFS) for filing purposes.

How long is the invitation for a SEI filer to create an account in the EFS valid?

90 days.

What if a SEI filer attempts to create their account after the 90 days?

The SEI filer would need to contact their JC to request a new, active token. If a filer does not create their account within the 90 days, the system will generate an email reminder the first part of March. The JC will need to vacate the seat and reassign the filer to generate an active token.

When is the deadline for filing an annual SEI report?

April 15th of each year. The Electronic Filing System (EFS) is available 24/7.

When does the “window” for filing the SEI report open?

Annually on March 15th. This gives SEI filers 30 days to complete their SEI filing on time.

NOTE: SEI filers, who have an account profile, will receive an email notification on March 15th letting them know the filing window is open and reminding them that they are required to file.

Are Jurisdictional Contacts (JCs) responsible for assisting filers?

Yes. JCs are responsible for assisting SEI filers in creating their profiles and setting up their accounts within the EFS. In addition, JCs should reach out to their jurisdictional seats and act as the local support person to aid SEI filers in completing and filing their annual SEI reports.

NOTE: JCs are **NOT** responsible for filing. SEI filers are responsible for filing their own SEI reports.

Are all public officials assigned to jurisdictional seats required to file a SEI?

No. Only public officials listed under ORS 244.050 are required to file an SEI report.

Are the disclosure questions different from year to year?

No. The questions are statutorily mandated and have not changed.

The system is not accepting my email address the way I entered it?

Try entering your email address in all lowercase letters.

SYSTEM REQUIREMENTS

To ensure the safety & security of your browsing experience, Oregon.gov websites are compatible with most popular browsing software. For more information, please visit [Supported Browsers](#) on Oregon.gov.

As with other provisions in Oregon Government Ethics law, it is each public official's personal responsibility to ensure they comply with the requirements to complete and electronically submit the SEI by April 15.

If you have any questions regarding the Annual Verified Statement of Economic Interest or the Oregon Government Ethics Commission, please call or email the OGEC staff.

Oregon Government Ethics Commission

3218 Pringle Rd SE, STE 220

Salem, OR 97302-1680

Phone: 503-378-5105

Website: www.oregon.gov/OGEC

Email: mail@ogec.oregon.gov

Banks School District #13

Budget Calendar

2023-2024

February 7, 2023	Regular Board Meeting Approve proposed Budget Calendar
March 13, 2023	Regular Board Meeting Appoint Budget Committee Members
April 20, 2023	Budget 101 for Budget Committee
May 5, 2023	Publish First Notice of meeting of the Budget Committee
May 12, 2023	Publish Second Notice of meeting of the Budget Committee
May 18, 2023	First meeting of the Budget Committee
May 25, 2023	Possible additional Budget Committee meeting
June 1, 2023	Possible additional Budget Committee meeting
June 2, 2023	Publication of Notice of Budget Hearing (ORS 294.448)
June 12, 2023	Regular Board meeting Public Hearing on 2023-2024 Budget (ORS 294.460)
July 15, 2023	Deadline to certify tax levy to the County Assessor