Alsea School Board Meeting

Tuesday, June 10, 2025 6:00 PM
Alsea School Library, 301 S 3rd St, Alsea, OR 97324

1. **Approval of Agenda**
2. **Consent Agenda**
   a. Approval of Minutes
      i. 5.13.2025 Board Meeting Minutes

Alsea School Board Meeting
Tuesday, May 13, 2025
6:00 PM
Alsea School Library

Alsea School District 7J
301 South 3rd Street
Alsea, OR 97324
541.487.4305

Board Members Present: Risteen Follett, Soren Rounds, Jamie Olsen, Russ Ceperich
Board Members Absent: None
Staff present: Krista Nieraeth, Don Staehely, Lora Nickle
Present online: Ricki Hendrix, Emilee Shondell, Sara Littlefield, Heather Shunk, Joe Harris, Chris Giggy, Holly Olsen, Pamela Russell, Keenan Elbers
Patrons Present: George Laiblin

1. **Call to Order – 6:03 PM**
   a. Flag Salute
   b. Approval of Agenda
   Agenda approved as presented.
2. **Move to Executive Session – 6:06 PM**
   a. Executive Session
      - ORS 192.660(2)(f) - To consider information or records that are exempt by law from public inspection.
3. **Return to regular session – 6:21 PM**
4. **Consent Agenda**
   a. Approval of Minutes
   April 8, 2025, Regular Board Meeting
   April 22, 2025 Budget Committee Orientation Meeting
   April 22, 2025, Budget Committee Meeting
   b. Monthly Financial Checklist
   c. Resignations
   Nicolaas VanDerZwan, MS/HS Science
   Erick Taylor, Culinary Teacher and Head Cook
   Shannon Naylor, LaHO Teacher
   Roxy Cessnun , SPED Secretary and Pre - ETS Coordinator
   d. Hire
   Tanya Parsons, LaHO Teacher
   e. Notification of Alsea School District Board of Director Position 2 Vacancy
   Jamie Olsen motioned to approve the Consent Agenda. Russ Ceperich seconded the motion. Motion carried 4-0.
5. **Patron Comments –** None
6. **Reports**
   a. Superintendent and K-12 Principal Reports
      i. Enrollment Report
      ii. Regular Attenders
   Ms. Nieraeth presented her reports to the Board, documents are available online. The Board discussed and asked clarifying questions.

b. K-5 LaHO Principal Report

Ms. Shunk presented her report to the Board. The document is available online.

c. Athletics and Activities

Mr. Harris presented his report to the Board. The document is available online. The Board discussed.

d. Business Manager Report

Mr. Staehely presented his report to the Board. The documents are available online. Additional information was provided to the Board explaining the change in the 25-26 State School Support ADMw Estimate and Impact for the 25-26 Proposed Budget.

e. Construction and Seismic Report

Chris Giggy presented his report to the Board. The document is available online.

f. Safety Committee Report

Ms. Nickle presented the report to the Board. The document is available online.

g. Educational Spotlight
SMART Reading Program

Ricki Hendrix, Sara Littlefield and Emilee Shondell presented their report to the Board. Emilee Shondell spoke to the connections that the leadership students and her K-1 students have made. The Board commented and requested that next year this program information be shared with the community for volunteer opportunities.

7. **New Business**

a. Action to be taken based on discussion in Executive Session

Jamie Olsen motioned that the Board take no action and maintain attorney-client privilege on July 12, 2023 Confidential Findings and Conclusions Investigation report and delegate authority to the Board Chair to issue a letter to the Board Chair to issue a letter to the Alsea School District requesting part stating that the Board has determined not to waive attorney-client privilege on the report. Soren Rounds seconded the motion. The Board did not discuss. Motion carried 4-0.

b. Work Session Topic - Alsea School District Vision

Russ Ceperich and Jamie Olsen spoke to the Board members about the CTE / FFA opportunities they have been looking into for Alsea SD. Risteen Follett recommended scheduling a work session to discuss and invite the community to give input. Ms. Nickle will send out an email to the Board to find dates that work.

c. Resolution 25-07 to Transfer Funds - Capital Projects Fund

This is an appropriation to move funds into Capital Projects to cover additional costs of projects as well as the seismic upgrades.

Jamie Olsen motioned to approve Resolution 25-07 to move funds to the Capital Project fund. Russ Ceperich seconded the motion. Motion carried 4-0.

8. **Old Business**
9. **First Reading *(Shaded words are new/strikethroughs are deleted)**
10. **Second Reading**
11. **Board Comments**
12. **Future Agenda Items**

13. **Key Dates**

    Budget Committee Meeting - May 20th at 6:00 PM
    Memorial Day, No School - May 26th
    Budget Committee Meeting (if needed) - May 27th at 6:00 PM
    Senior Banquet - May 28th at 6:00 PM
    School In Session - May 30th
    Strategic Planning meeting - June 3rd at 4:15 PM
    Community Event, Choir Concert - June 4th at 5:00 PM
    HS Graduation - June 6th at 7:00 PM
    School Board Meeting - June 10th at 6:00 PM
    Last Day of School K-11 - June 12th, 12:35 Early Release

_____	_____
Risteen Follett, Board Chair Date	Krista Nieraeth, Superintendent Date

ii. 5.19.2025 Seismic Grant Meeting Minutes

Seismic Grant
Monday, May 19, 2025
7:30 PM
Virtual Only

Alsea School District 7J
301 South 3rd Street
Alsea, OR 97324
541.487.4305

Board Members Present: Risteen Follett, Soren Rounds, Jamie Olsen, Russ Ceperich

Board Members Absent: None

Staff Present: Krista Nieraeth, Don Staehely, Lora Nickle

Patrons Present: Chris Giggy, Nancy Giggy

1. Call to Order – 7:31 PM
   a. Flag Salute
   b. Approval of Agenda

   Agenda approved as presented.
2. Public Comment – None
3. New Business
   a. Seismic Grant Discussion

   Chris Giggy presented the revised budget document to the Board. The document is available online. The Board discussed at length.

   Russ Ceperich motioned to approve the transfer of $560k from the Capital Fund to the Seismic Grant. Soren Rounds seconded the motion. Motion carried 4-0.
4. Adjournment – 8:28 PM

_____ _____

Risteen Follett, Board Chair Date Krista Nieraeth, Superintendent Date

iii. 5.20.2025 Budget Committee Meeting Minutes

Alsea Budget Committee Meeting Minutes
Tuesday, May 20, 2025
6:00 PM
Alsea School Library

Alsea School District 7J
301 South 3rd Street
Alsea, OR 97324
541.487.4305

Board Members Present: Risteen Follett, Soren Rounds, Jamie Olsen

Board Members Absent: Russ Ceperich

Budget Committee Members Present: Tracy Foster, Mackenzie Webb, Kathi Gamler, Cherl VanLeuven

Budget Committee Members Absent: None

Staff Present: Krista Nieraeth, Don Staehely, Lora Nickle

Patrons: George Laiblin

Online Attendees: None

1. **Call to Order – 6:01 PM**
   a. Flag Salute
2. **Approval of Agenda**
   Agenda approved as presented.
3. **Approval of Minutes** - 04.22.2025 Budget Committee Meeting Minutes
   Risteen Follett motioned to approve the minutes from 04.22.2025. Jamie Olsen seconded.
4. **Patron Comments –** None
5. **Budget Discussion**
   a. Review 2025-26 Proposed Budget
   b. Financial Impacts to Proposed Budget
      - ADMw Update
      - SB849 - PERS Rate
      - Unemployment Reserve
      - General Fund - Use of Cash
   c. Recommended Changes to the 2025-26 Proposed Budget
   d. Discussion / Questions

   Mr. Staehely presented the changes to the 25-26 Proposed Budget. The documents are available online. The Committee discussed and asked clarifying questions.
6. **Set Next Meeting or Approve Proposed Budget Resolution**
   Tracy Foster read the Proposed Budget Resolution to the Committee. The committee unanimously approved the 2025-26 Proposed Budget.
7. **Adjournment – 7:07 PM**

b. Hires:
Jessica Ewton - 7-12 Science Teacher
Sarah Roy - 6th Grade Teacher

c. Monthly Financial Checklist

MONTH END RECONCILIATIONS AND FINANCIAL REVIEW REPORT

Month: May 2025

1. Payroll Processing – Reviewed and approved by Human Resources
   - ☑ Payroll reconciliation reports reviewed prior to processing.
   - ☑ Federal and state deposits have been made, as well if quarterly, federal and state reports have been reviewed and submitted
   - ☑ OEBB invoice been reconciled to payroll
   - ☑ Workers Compensation reconciled to payroll
   - ☑ Deduction payment reconciliation reviewed to ensure all liabilities have been processed

Roxie Smallwood, Human Resource — June 2, 2025 (Date)

2. Deposits, Checks, Vouchers
   - ☑ All transactions have been entered into the financial accounting system and processed for the month.
   - ☑ All vouchers for checks and direct deposits have been reviewed and approved by the Superintendent.

Brynn Campbell, Accounts Payable/Receivable — 6/3/25 (Date)

3. Bank Reconciliations – Completed and approved by Superintendent
   - ☑ Citizens bank account
   - ☑ Local Government Investment Pool

4. Federal and State reimbursement requests made during the month
   - ☑ Monthly claims made and approved by Superintendent
   - ☐ If applicable, quarterly claims and reports made and approved by Superintendent

5. Financial Statements
   - ☑ Prepared after all reconciliations have been completed
   - ☐ Any manipulation of general ledger transactions in preparing statements
     - ☐ None
     - ☑ Yes, list below:
       1. Accrued substitute payroll based on average cost per month by account code

6. Business Office Internal Controls – Any changes to current procedures?
   - ☐ Yes – submitted to Board for review
   - ☑ None

7. Other

- ☐ Business Office Internal Controls – Any changes to current procedures?
  - ☐ Yes
  - ☑ None

_____

_____

_____

- ☐ Any new pronouncements that will impact financial statements or budget for 25-26 fiscal year.
  - ☐ Yes, list below:

_____

_____

_____

Other items that may have an impact on the financial statements of the district?

- ☑ None
- ☐ Yes, list below:

Donald Staehely, Business Manager — Date: 6/4/25

Deposits, Checks, Vouchers

- ☑ Issued to Board of Directors after month-end reconciliations – created by Accounts Payable/Receivable and submitted to Superintendent for distribution
- ☑ Has the Board of Directors responded to any items?
  - ☐ Yes, and were all Board Members provided with the response
  - ☑ None

Krista Nieraeth, Superintendent — Date: 6/5/2025

Revised 5/6/2025

3. **Patron Comments:**

The Alsea School Board of Directors values the opinions and input of students, staff, parents, and community members. Although board meetings are held in public, they are not meetings of the public. Please keep your comments to 3 minutes or less. If you intend to speak to the board this evening, you will need to fill out one of the blue comment cards and hand it to the Board Secretary, Lora Nickle. Public comments may also be made via Zoom. If you intend to speak via Zoom, please put your name in the comments so that the board chair can call on you. Before you begin your comments, please state your name and if you are speaking for an organization, please state that organization. For more information about public comments at a board meeting, please see Alsea School District Policy BDDH.

4. **Reports**

a. Educational Spotlight - High Dosage Tutoring

HD Tutoring Program – End-of-Year Report

As we close out the school year, we are pleased to report that all students who participated in HD Tutoring demonstrated measurable growth, as indicated by both the iReady diagnostic assessments and Core Phonics evaluations. While we fully recognize that this growth is not solely the result of our individual tutoring sessions, we see these results as a testament to the excellent, ongoing instruction provided by the Brick and Mortar classroom teachers. The tutoring program serves as a strong complement to that core instruction, although common sense may have to be used to some extent in that we certainly cannot attribute these improvements to one factor. At the end are snapshots of the 4 B & M students in my charge. The names have been omitted.

Four foundational reading skills were addressed which we tried to balance as evenly as possible. Print concepts and phonological awareness supported phonics instruction, morphological instruction extended students' word recognition, and fluency automatized word reading. Core phonics evaluations were done by the classroom teacher or assistants and then recommendations were passed to us in the form of primarily phonics-related material. Through a wide variety of activities on letter boards, within decodables and on whiteboards, we were able to address gaps in foundational literacy skills. Our small-group and one-on-one sessions contribute in several meaningful ways:

1. **Targeted Focus on Individual Needs**
   Each session was designed to intensify student focus on specific areas of need identified through classroom data and **Core Phonics Assessments**. By working directly with students on these targeted skills, we were able to deepen their understanding and reinforce essential concepts. Letter and phoneme identification, blends, consonants, digraphs, long vowel / short vowel spellings, "R" controlled vowels, reading fluency and confidence etc. were targeted according to identified unique needs of each student.

2. **Repetition for Reinforcement**
   One of the key advantages of the HD Tutoring model is the opportunity for focused repetition. We repeatedly returned to priority skills and strategies, ensuring students had multiple chances to practice and internalize them.

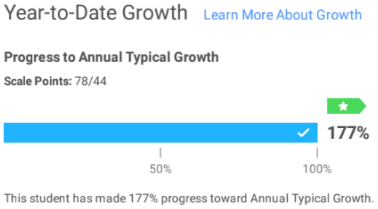
3. **Positive Student-Teacher Relationships**
   Students responded positively to the individualized attention they received. Many expressed excitement about having "their own teacher," which appeared to boost motivation and confidence. These relational dynamics helped lower affective filters, allowing students to engage more fully and take academic risks in a supportive environment.

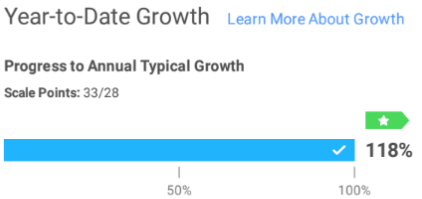
4. **Maximizing Short Timeframes**
   Although tutoring sessions were brief, the combination of personalized instruction, student comfort, and purposeful activities allowed us to achieve a high impact in a short amount of time.

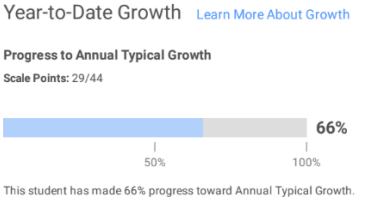
We are proud of the progress our students made and believe that the HD Tutoring program played a valuable supporting role in their success. We look forward to continuing and refining this work in future school years.

Respectfully submitted,
Adam Sederlin
HD Tutoring Team

[Sample 3 minutes from a typical session](#) (video)







Alsea School District High Dosage Tutoring - Progress and Data Tracking Form		
Student Name: [redacted]	**Grade:** [redacted]	**School Year: 24-25**
Goal(s) Based On Core Phonics Assessment:	Consonant Sounds, short vowels in cvc words, consonant blends with short vowels	
(6) Weeks Tutoring Session Starting: 10/14/24 Review at 6 Weeks: 11/18/24	**Tutor: Adam Sederlin**	**Appointment Time: Appointment Days:** M-Th
Session Date: 10/14 Attendance: Yes/No	Targeted Practice: Relationship building, fish for challenging consonants and vowels Progress: No difficulties with most consonants in recognition, some switches with b and d and p. W and were challenging. Tomorrow, investigate the /w/ continue looking for other difficulties to work on.	
Session Date: 10/15 Attendance: Yes/No	Targeted Practice: W and Wh "w"sound-- interrogatives Progress: We practiced and noticed the wh in what, where, etc.. as he sees the wh, he wants to aspirate exagger	
Session Date: 10/16 Attendance: Yes/No	Targeted Practice: OW to investigate w more- in other contexts. Progress: cow, wow, now, practiced different consonant sounds after "cementing" the ow sound.	
Session Date: 10/17 Attendance: Yes/No	Targeted Practice: progression- vowel recognition, long vowel sound production, short vowel sound production, Progress: isolated vowel sounds repetition– not applied cvc words- tomorrow, short vowel in cvc begin… probably a week of just that.	
Session Date: 10/21	Targeted Practice: Short vowels, in cvc contexts	

2:00 PM	Student	Grade	Concepts
Sederlin	[redacted]	2	consonant blends with short vowel; short vowels, digraphs, -tch; r controlled vowels
Waverek		2	r controlled vowels; long vowel spelling
Dapkus		2	short vowels, digraphs, -tch; long vowel spelling
Naylor		2	short vowel sounds; consonant blends with short vowels

2:20 PM	Student	Grade	Concepts
Sederlin	[redacted]	2	consonant blends with short vowels; short vowels, digraphs, -tch
Waverek		3	r - controlled vowels; Long vowel Spellings
Dapkus		3	variant vowels; low frequency vowels spelling
Naylor		2	long vowel spellings; variant vowels

2:40 PM	Student	Grade	Concepts
Sederlin	[redacted]	3	long vowel spellings; variant vowels
Waverek		3	variant vowels; low frequency vowel spelling
Dapkus		3	Consanant Blends with Short Vowels; Digraphs and -tch
Naylor		3	low frequency vowels and consanant spelling; multisyllabic words

3:00 PM	Student	Grade	Concepts
Sederlin	[redacted]	4	Short vowels, diagraphs, -tch; r - controlled vowels; long vowel sounds; variant vowels
Waverek		4	long vowel spellings, variant vowels, multisyllabic words
Dapkus		4	Variant Vowels, Low Frequency vowel and consonant spellings

b. Superintendent and K-12 Principal Reports

Alsea School District

June 2025 Board Meeting Board Report

Krista Nieraeth, Superintendent and Special Education Director

---

1. **Transportation**

We are winding down the end of the school year. Transportation has been a struggle this year, but I applaud Mr. Elbers for the hard work he has put into getting this department up and running. We've had to work on streamlining systems between us and WLA, getting reports correct, find creative ways to ensure that all of our bus routes, morning and afternoon, are filled, among the many other items. This summer will be filled with completing annuals for all district vehicles, working on CDL and Type 20 licenses for staff, and working on recruiting drivers for our positions.

2. **Facilities**

Football Field - Work on the football field began last week. They have completely scrapped the existing grass off the field and are now working on adding the topsoil to the field. Work will hopefully be done by the end of next week, and then the hydroseed will be put into place.

Seismic Construction - Mr. Elbers and I have been coordinating with the Giggy's and Todd Construction to hand areas off to Todd to start the seismic construction. The pass through between the metal wing and the elementary wing is currently closed off, as they have abated it and will be starting construction there as well. We are working with the staff now who's areas will be affected in the construction to pack up and begin storing their items before construction starts on June 16th.

3. **COPS – SVPP Grant**

I am working with Mr. Roberts and Mr. Elbers in writing for and getting a budget for the COPS – SVPP Grant. We are resubmitting our application, with some revisions, to again include a schoolwide intercom system, new doors, and automatic closing and locking systems. We are working on a budget for the project, but there is match of 25% for the district for the total budget. The grant will be submitted by June 26th. We should know by Fall 2025 if we are recipients of this grant. For more information on this grant, please visit https://cops.usdoj.gov/svpp.

4. **OSAS Testing**

Our district has completed the OSAS testing for this year. Please remember that we are required to test in the subject areas of ELA and Math for grades 3 – 8 and 11, and Science for grades 5, 8, and 11. Thank you to Ms. Wilson, Mrs. Shunk, Mrs. Naylor, Mrs. Dapkus, Ms. Snyder, Ms. Boser, Mr. Chilcote, and Mrs. White for all their help in getting our students tested by the end of the year. We have some preliminary results, but the actual results will be posted later this summer.

5. Legislative Update

As you all know, the Joint Ways and Means Committee has sent to the full Legislative Body the recommendation that the funding for the next biennium be $11.36 billion. Senate Bill 5516 is the bill for funding and hopefully will be up for a vote within the next week. There is also an accountability bill, SB 141, that will be up for vote in this session that is considered the Accountability bill, which will provide metrics for school districts to meet, with actions for those who do not meet them in certain time frames. SB 916 is one that is going for vote in the House this week. This bill addresses unemployment benefits to striking workers after the 2nd week of a strike. This bill will have financial implications for all districts, especially small ones.

These are bills to keep your eyes on. All bills have to be signed by Jun 30th.

Performance Distribution, By Test Group: Alsea Charter School, 2023-2024

Filtered By **Test Reasons:** All Test Reasons | **Reporting Time Period:** 06/04/2024 | **Sorted By:** Date Last Taken

OSAS Mathematics

Grades Tested: **3, 4, 5, 6, 7, 8, 11**

Tests Taken: **112** Date Last Taken: **05/22/2024**

Percent	**64%**	**23%**	**10%**	**3%**
Count	72	26	11	3

OSAS ELA

Grades Tested: **3, 4, 5, 6, 7, 8, 11**

Tests Taken: **114** Date Last Taken: **05/01/2024**

Percent	**55%**	**30%**	**11%**	**4%**
Count	63	34	13	4

OSAS Science

Grades Tested: **5, 8, 11**

Tests Taken: **42** Date Last Taken: **04/02/2024**

Percent	**43%**	**33%**	**21%**	**2%**
Count	18	14	9	1

Participation Percentage

ELA – 89.6
MATH – 88.2
SCIENCE – 93.2

Copyright © 2025 Cambium Assessment, Inc. All rights reserved.

Performance Distribution, By Test Group: Alsea Charter School, 2024-2025

Filtered By **Test Reasons:** All Test Reasons | **Sorted By:** Date Last Taken

OSAS Mathematics

Grades Tested: **3, 4, 5, 6, 7, 8, 11**

Tests Taken: **126** Date Last Taken: **05/21/2025**

Percent	**62%**	**23%**	**11%**	**4%**
Count	78	29	14	5

OSAS ELA

Grades Tested: **3, 4, 5, 6, 7, 8, 11**

Tests Taken: **126** Date Last Taken: **05/08/2025**

Percent	**46%**	**29%**	**21%**	**5%**
Count	58	36	26	6

OSAS Science

Grades Tested: **5, 8, 11**

Tests Taken: **43** Date Last Taken: **03/19/2025**

Percent	**35%**	**49%**	**14%**	**2%**
Count	15	21	6	1

Copyright © 2025 Cambium Assessment, Inc. All rights reserved.

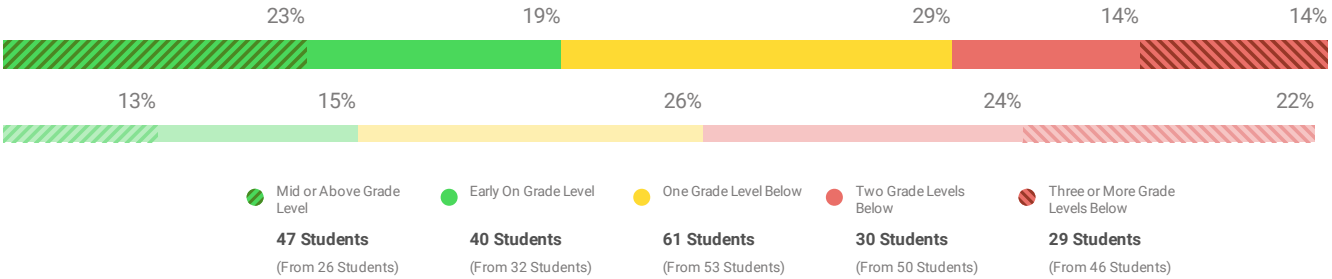
Diagnostic Results

School	All Schools
Subject	Reading
Academic Year	2024 - 2025
Diagnostic	Spring
Prior Diagnostic	Fall

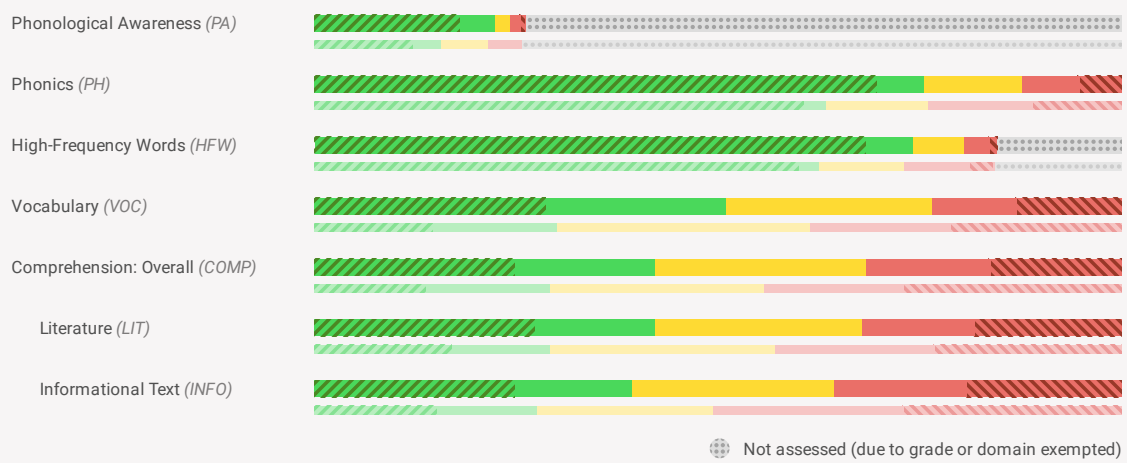
Criterion Referenced

Overall Placement

Students Assessed/Total: **207/235**



Placement by Domain



Switch Table View: Placement Summary

Choose to Show Results By: School

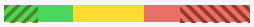
Showing 3 of 3

School		Overall Grade-Level Placement						Students Assessed/Total
ALSEA ELEMENTARY	Spring		22%	23%	36%	13%	6%	83/86
	Fall		11%	8%	30%	35%	16%	

© Curriculum Associates, LLC, All Rights Reserved. | i-Ready.com

Diagnostic Results

School	All Schools
Subject	Reading
Academic Year	2024 - 2025
Diagnostic	Spring
Prior Diagnostic	Fall

School		Overall Grade-Level Placement						Students Assessed/Total
ALSEA MIDDLE & HIGH SCHOOL	Spring		13%	15%	29%	15%	29%	62/77
	Fall		10%	13%	16%	18%	44%	
LEARN AT HOME OREGON	Spring		34%	19%	21%	16%	10%	62/72
	Fall		18%	27%	29%	16%	10%	

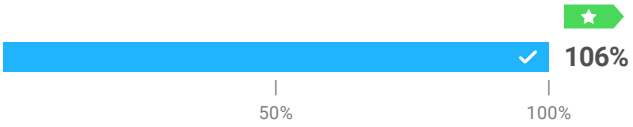
© Curriculum Associates, LLC, All Rights Reserved. | i-Ready.com

Diagnostic Growth

School	All Schools
Subject	Reading
Academic Year	2024 - 2025
Comparison Diagnostic	Spring

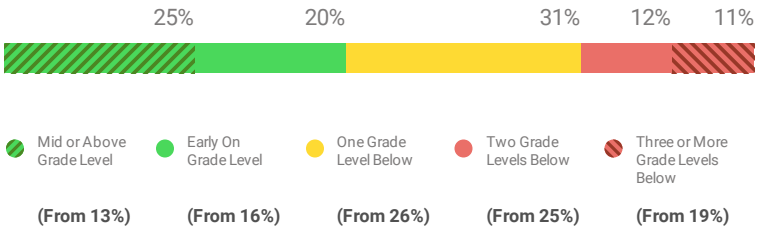
Students Assessed/Total: **185/189**

Progress to Annual Typical Growth (Median)



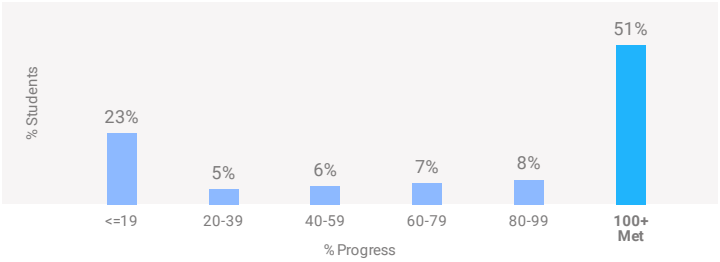
The median percent progress towards Typical Growth for this school is 106%. Typical Growth is the average annual growth for a student at their grade and baseline placement level.

Current Placement Distribution



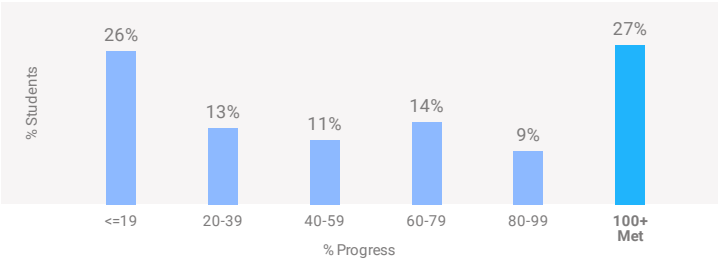
Distribution of Progress to Annual

Typical Growth



Distribution of Progress to Annual

Stretch Growth®



Choose to Show Results By

School

Showing 3 of 3

School	Annual Typical Growth		Annual Stretch Growth®		% Students with Improved Placement	Students Assessed/Total
	Progress (Median)	% Met	Progress (Median)	% Met		
ALSEA ELEMENTARY	135%	64%	72%	31%	69%	86/86
ALSEA MIDDLE & HIGH SCHOOL	161%	60%	55%	23%	50%	30/31
LEARN AT HOME OREGON	45%	30%	26%	23%	45%	69/72

© Curriculum Associates, LLC, All Rights Reserved. | **i-Ready.com**

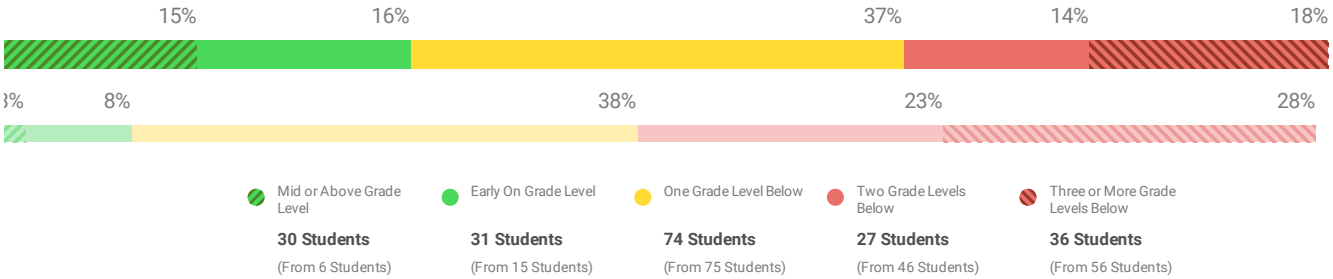
Diagnostic Results

School	All Schools
Subject	Math
Academic Year	2024 - 2025
Diagnostic	Spring
Prior Diagnostic	Fall

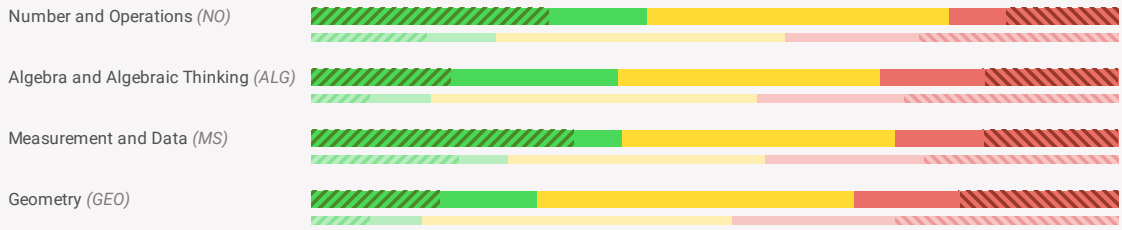
Criterion Referenced

Overall Placement

Students Assessed/Total: **198/216**



Placement by Domain



Switch Table View: Placement Summary

Choose to Show Results By: School

Showing 3 of 3

School		Overall Grade-Level Placement						Students Assessed/Total
ALSEA ELEMENTARY	Spring		16%	20%	41%	13%	10%	82/86
	Fall		0%	7%	40%	28%	24%	
ALSEA MIDDLE & HIGH SCHOOL	Spring		6%	11%	28%	17%	39%	54/58
	Fall		2%	6%	20%	19%	54%	

© Curriculum Associates, LLC, All Rights Reserved. | i-Ready.com

Diagnostic Results

School	All Schools
Subject	Math
Academic Year	2024 - 2025
Diagnostic	Spring
Prior Diagnostic	Fall

School		Overall Grade-Level Placement						Students Assessed/Total
LEARN AT HOME OREGON	Spring		23%	15%	40%	11%	11%	62/72
	Fall		8%	10%	50%	21%	11%	

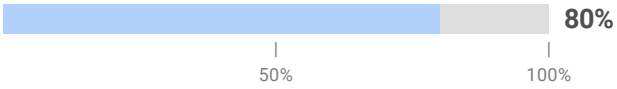
© Curriculum Associates, LLC, All Rights Reserved. | **i-Ready.com**

Diagnostic Growth

School	All Schools
Subject	Math
Academic Year	2024 - 2025
Comparison Diagnostic	Spring

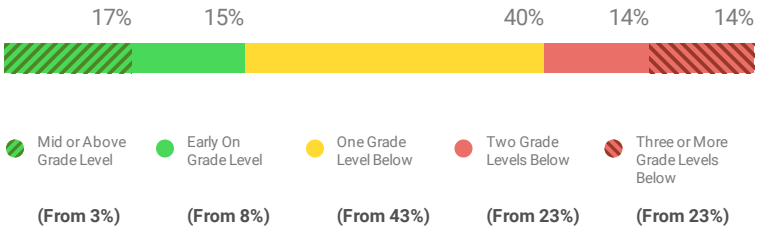
Students Assessed/Total: **183/189**

Progress to Annual Typical Growth (Median)



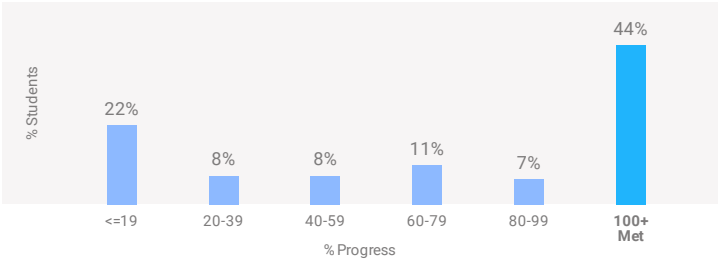
The median percent progress towards Typical Growth for this school is 80%. Typical Growth is the average annual growth for a student at their grade and baseline placement level.

Current Placement Distribution



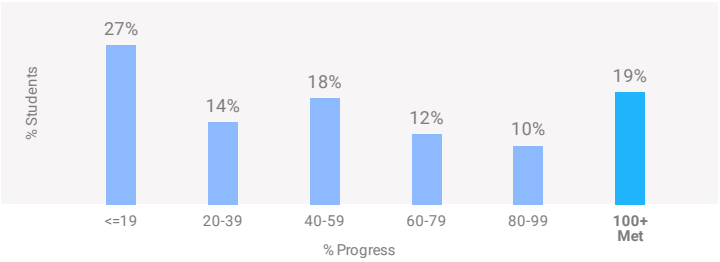
Distribution of Progress to Annual

Typical Growth



Distribution of Progress to Annual

Stretch Growth®



Choose to Show Results By

School

Showing 3 of 3

School	Annual Typical Growth		Annual Stretch Growth®		% Students with Improved Placement	Students Assessed/Total
	Progress (Median)	% Met	Progress (Median)	% Met		
ALSEA ELEMENTARY	100%	54%	60%	24%	73%	85/86
ALSEA MIDDLE & HIGH SCHOOL	92%	48%	44%	17%	48%	29/31
LEARN AT HOME OREGON	50%	29%	31%	13%	38%	69/72

© Curriculum Associates, LLC, All Rights Reserved. | **i-Ready.com**

Alsea School District

June 2025 School Board Report – K-12 B&M School

Krista Nieraeth, Principal

---

1. Students of the Month for May and June

The character trait for May was Endurance and for June was Spirited.

Congratulations to the following students:

May	June
K - Micah Glanville	K - Bryson Wineteer
1 - Ivan Olsen	1 - Brantley Tolleson
2 - Leo Ellis	2 - Davina Kelley
3 - Faith Smallwood	3 - Jack Cleveland
4 - Danika Kelley	4 - Levi White
5 - Aria Vance	5 - Seth Schubert
6 - Samuel Beatty	6 - Evan Lamb
7 – Aiden Bulthuis	7 – Cheyanne Smith
8 – Killian Garibay	8 – Kolby Crook
9 – Devyn Smallwood	9 – Emmett Sapp
10 – Mariana Gembala	10 – Jesse Sexton
11 – Lianna Corona	11 – Paisley Jacobsen
12 – Kendra Stone	12 – Callie Rariden

2. K – 2 Field Trip to Newport

Mrs. Shondell and Mrs. Olsen took their classes to the Aquarium in Newport, as well as having lunch on the beach. Thank you to Mrs. Shondell, Mrs. Olsen, Mrs. White, and Ms. Pedder, along with all the parent volunteers, for taking the students on this experience.

3. **After School Choir Concert**

We partnered with Ms. Ellis to host an after school choir at school for the spring. They met 2x a week throughout the spring. On June 4th, they hosted a choir concert in our gym. Students in grades K – 6 participated in the event. Thank you to Ms. Ellis and her father for their hard work in teaching the students music and providing the music. It was a great event.

4. **Unified CTE and Kickball Events**

In May, Ms. Cessnun took our students to Sweet Home High School to attend CTE and Kickball events. These events were unified events that were hosted by our regional ESD. At the CTE event, our students were able to participate in different CTE activities, such as welding, horticulture, and tractor driving. At the kickball event, students were able to participate in a tournament with other schools. Thank you to Mr. Martin and the Sweet Home staff for putting on amazing events for our students.

5. **OSAS and I – Ready Scores**

Our school completed the OSAS and I – Ready Diagnostics this June. Our staff will use this data to drive schoolwide systems and classroom instruction, as well as help inform decisions in terms of different grants we qualify for, including the Summer Learning grant for 2026 and the Early Literacy grant. I've included this data in my superintendent packet for this month.

6. **Alsea Class of 2025 Commencement Ceremony**

Our Class of 2025 Commencement Ceremony was held on Friday, June 6th. We graduated 11 students, with each of them having a plan after graduation. I am very proud of our students and staff for their hard work in getting to this point.

Alsea School District
Budget Information
May 27, 2025

BUDGET BASICS

Oregon State School Fund

- Funded on a 2-year (biennium) cycle
- We are in year 2 of the 23-25 biennium
- Funds are disbursed 49% year 1 - 51% year 2
- All funds are contingent on student enrollment
- Our enrollment (along with most Oregon SD's) is declining
- We received $10,217 in 24/25 and will receive approx. $11,000 in 25/26 for each student with some student groups receiving additional ADM (IEP up to 11%, ELL, Poverty, Foster Care, etc.)
- We receive payment on enrollment of the higher of 2 years (current and last year)
- All budgets are estimates until audited ADM numbers are submitted to the state. In May the following school year, districts may get more money or must repay money based on Actuals vs. Estimates.
    - This past week, Alsea had to pay to ODE $87,988 based on our actual ADM coming in lower than what our estimated ADM was funded at for the 23/24 school year.

Comparison between 23/24 and 24/25

End of Year ADMr for 23/24- 265

Projected ADMr for 24/25 - 233

32 less students = $326,944

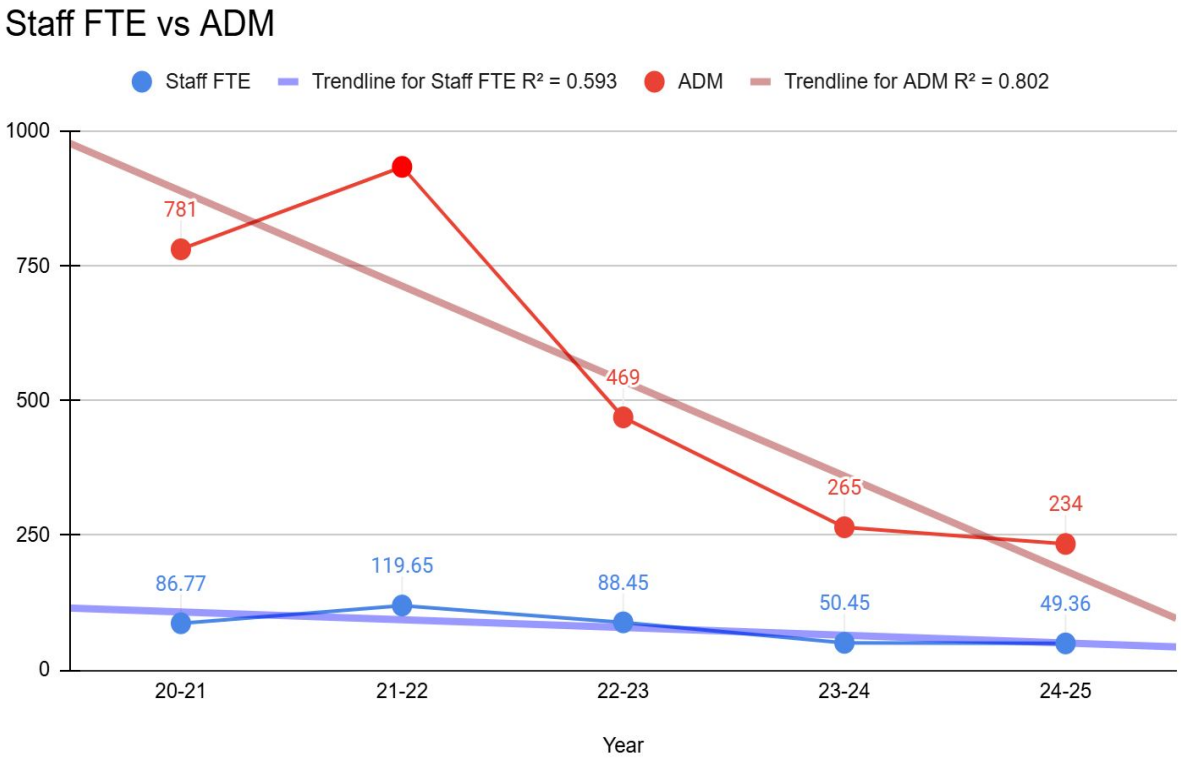
Projected Enrollment for 25-26

Projected Incoming Kindergartners = 8

2025 Senior class = 11

3 less students = $33,000

Enrollment/Staffing Levels



Year	ADM	Staff FTE	ADM/FTE
20-21	781	83.02	9.41
21-22	934	110.9	8.42
22-23	469	87.95	5.33
23-24	265	50.95	5.20
24-25	234	47.23	4.95

Grant Funds vs. General Fund

- Our largest State grants are SIA (Student Investment Account), HSS (High School Success), CSI/TSI, and Early Literacy.
- Most grants are **enrollment connected**, so we will receive less funds, unless we are at the floor amount.
- Each grant funds specific programming and can only be spent on specified expenditures.
- One major requirement for most federal grants is the supplement vs supplant rule, meaning we cannot take something already funded with general funds and move it to a grant. Examples are Title and IDEA.
- The district does not generally write for grants to fund FTE. Grants, outside of ones we know we are getting consistently from the state, should not be counted upon to maintain FTE. Even grants from the state should not be counted upon to maintain FTE.

Where are staff funded?

Year	Staff FTE	General Fund	Other
20-21	83.03	73.34	9.69
21-22	110.9	92.55	18.35
22-23	87.95	68.76	19.19
23-24	50.95	35.7	15.25
24-25	47.23	35.2	12.03

How do we make it work?

- For the 25/26 fiscal year, we are projecting that we will deficit spend from our carryover funds by $1.1 million.
- Our Grants Funds from State (SIA, HSS, CSI/TSI, EIIS, EL) will decrease by 20% from 24/25 to 25/26.
- Approx. 73% of our budget is personnel costs.
- The carryover should include at least 2 month worth of payroll and utility bills (approximately $900K).
- To help reduce our carry over dependance for the 25/26 fiscal year, we will be looking at reducing FTE through attrition, reduction of days in personnel contracts, and reduction of FTE hours.
- For 26/27 year, if enrollment stay stagnant or declines, the district will be looking at reducing any usage of carryover by half, plus any additional amount equal to the reduced enrollment. This reduction **may** include reduction of FTE.

What we don’t know and the future….

- Actual budget from the state
- Level of funding for special education students
- Amount of Federal Grants (Title, IDEA, SRSA)
- Any legislation that has gone and is currently going through the House and Senate that affects us financially (i.e. Cell Phone bill ban (HB 2251), unemployment during strikes (SB 916), unemployment for classified staff during breaks (SB 489 from the 2023 session)).
- If we continue to spend at the same rate we are now without a major increase in enrollment, our carryover will be depleted by the 28/29 school year, if not sooner.
- The district will not add spending to 25/26 even if we receive more funds than we anticipate.

Future....

- Handout 25/26 Budget Document - General Fund

- Questions, Concerns, Ideas?
  - Please feel free to contact myself or Don

Websites for information

ODE State School Fund:

https://www.oregon.gov/ode/schools-and-districts/grants/pages/school-district-and-esd-payment-statements.aspx

Alsea SD Budget Document

https://alsea.k12.or.us/district/budget/

i. Enrollment Report

Grade Level	2024-2025 SY									
	9/1	10/1	11/1	12/1	1/1	2/1	3/1	4/1	5/1	6/1
KG	13	14	12	13	13	14	13	14	14	14
1st	13	13	13	12	12	13	12	12	12	12
2nd	32	33	33	33	33	32	30	30	31	31
3rd	32	32	31	31	31	31	31	31	31	30
4th	24	24	22	23	22	23	24	25	27	26
5th	25	26	26	28	27	30	29	28	28	28
6th	17	17	17	16	16	17	17	18	17	16
7th	17	17	17	17	17	16	16	16	16	16
8th	15	15	15	15	16	16	16	15	15	15
9th	11	11	10	10	10	10	10	9	9	9
10th	16	13	16	16	16	16	16	17	17	17
11th	11	10	10	10	10	10	10	10	10	10
12th	11	11	11	11	11	11	11	11	11	11
Total ADM	237	236	233	235	234	239	235	236	238	235

	2023-2024 SY									
	9/1	10/1	11/1	12/1	1/1	2/1	3/1	4/1	5/1	6/1
KG	19	18	18	16	16	16	17	17	16	16
1st	35	42	39	39	39	40	40	39	39	39
2nd	35	36	36	37	37	37	37	37	37	35
3rd	28	32	30	29	29	28	28	27	25	26
4th	24	25	26	25	25	25	24	24	24	24
5th	23	24	26	25	25	24	21	21	18	18
6th	13	13	12	12	12	12	13	13	15	15
7th	18	20	19	19	18	17	17	17	17	17
8th	13	13	13	13	13	13	13	13	13	12
9th	20	22	22	23	23	22	20	17	16	16
10th	12	12	12	12	12	12	12	12	11	11
11th	13	14	13	14	14	14	13	13	13	13
12th	13	11	10	10	10	10	10	8	8	8
Total ADM	266	282	276	274	273	270	265	258	252	250

	2022-2023 SY									
	9/1	10/1	11/1	12/1	1/1	2/1	3/1	4/1	5/1	6/1
KG	58	62	60	61	60	56	55	53	50	49
1st	56	66	64	66	64	60	60	58	54	53
2nd	42	41	41	45	43	38	36	35	32	30
3rd	43	50	54	53	51	46	46	46	45	44
4th	37	41	47	47	47	43	42	40	39	39
5th	29	32	36	36	36	29	29	26	24	23
6th	35	45	49	49	46	43	37	34	34	33
7th	44	59	59	61	59	56	56	52	48	41
8th	41	51	53	52	50	44	42	42	41	39
9th	14	14	13	13	12	12	12	12	13	12
10th	17	16	16	16	16	15	15	14	14	13
11th	21	21	21	22	20	20	20	19	17	17
12th	25	24	22	22	21	20	20	15	14	14
Total ADM	462	522	535	543	525	482	470	446	425	407

ENROLLMENT															
Grade	**In building/ LaHO**	**K**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TOTAL**
As of 9/1/24	In building	5	8	13	11	15	19	17	17	15	11	16	11	11	**169**
As of 9/1/24	Learn at Home	8	5	19	21	9	6	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**68**
As of 9/1/24	**TOTAL**	**13**	**13**	**32**	**32**	**24**	**25**	**17**	**17**	**15**	**11**	**16**	**11**	**11**	**237**
As of 10/1/24	In building	5	8	14	11	15	20	17	17	15	11	16	9	11	**169**
As of 10/1/24	Learn at Home	9	5	18	20	9	6	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**67**
As of 10/1/24	**TOTAL**	**14**	**13**	**32**	**31**	**24**	**26**	**17**	**17**	**15**	**11**	**16**	**9**	**11**	**236**
As of 11/1/24	In building	5	8	14	11	14	20	17	17	15	10	16	10	11	**168**
As of 11/1/24	Learn at Home	7	5	19	20	8	6	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**65**
As of 11/1/24	**TOTAL**	**12**	**13**	**33**	**31**	**22**	**26**	**17**	**17**	**15**	**10**	**16**	**10**	**11**	**233**
As of 12/1/24	In building	6	7	14	11	14	21	16	17	15	10	16	10	11	**168**
As of 12/1/24	Learn at Home	7	5	19	20	9	7	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**67**
As of 12/1/24	**TOTAL**	**13**	**12**	**33**	**31**	**23**	**28**	**16**	**17**	**15**	**10**	**16**	**10**	**11**	**235**
As of 01/01/25	In building	6	7	14	11	14	21	16	17	16	10	16	10	11	**169**
As of 01/01/25	Learn at Home	7	5	19	20	8	6	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**65**
As of 01/01/25	**TOTAL**	**0**	**12**	**33**	**31**	**22**	**27**	**16**	**17**	**16**	**10**	**16**	**10**	**11**	**234**
As of 02/1/25	In building	7	7	13	12	14	22	17	16	16	10	16	10	11	**171**
As of 02/1/25	Learn at Home	7	6	19	19	9	8	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**68**
As of 02/1/25	**TOTAL**	**14**	**13**	**32**	**31**	**23**	**30**	**17**	**16**	**16**	**10**	**16**	**10**	**11**	**239**
As of 03/01/25	In building	6	7	12	12	14	21	17	16	16	10	16	10	11	**168**
As of 03/01/25	Learn at Home	7	5	18	19	10	8	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**67**
As of 03/01/25	**TOTAL**	**13**	**12**	**30**	**31**	**24**	**29**	**17**	**16**	**16**	**10**	**16**	**10**	**11**	**235**
As of 04/01/25	In building	7	7	12	12	14	20	18	16	15	9	17	10	11	**168**
As of 04/01/25	Learn at Home	7	5	18	19	11	8	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**68**
As of 04/01/25	**TOTAL**	**14**	**12**	**30**	**31**	**25**	**28**	**18**	**16**	**15**	**9**	**17**	**10**	**11**	**236**
As of 05/01/25	In building	7	7	12	12	14	19	17	16	15	9	17	10	11	**166**
As of 05/01/25	Learn at Home	7	5	19	19	13	9	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**72**
As of 05/01/25	**TOTAL**	**14**	**12**	**31**	**31**	**27**	**28**	**17**	**16**	**15**	**9**	**17**	**10**	**11**	**238**
As of 06/01/25	In building	7	7	12	11	14	19	16	16	15	9	17	10	11	**164**
As of 06/01/25	Learn at Home	7	5	19	19	12	9	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**71**
As of 06/01/25	**TOTAL**	**14**	**12**	**31**	**30**	**26**	**28**	**16**	**16**	**15**	**9**	**17**	**10**	**11**	**235**

ii. Regular Attenders

REGULAR ATTENDERS

>90% Positive Attendance

Grade Level	Enrollment #	01-Oct	Enrollment #	01-Nov	Enrollment #	01-Dec	Enrollment #	01-Jan	Enrollment #	01-Feb	Enrollment #	01-Mar	Enrollment #	01-Apr	Enrollment #	01-May	Enrollment #	01-Jun
KG	14	64.29%	12	83.33%	13	61.53%	13	61.53%	14	64.28%	13	53.84%	14	50.00%	14	50.00%	14	57.14%
1st	13	92.31%	13	61.53%	12	50.00%	12	41.66%	13	38.46%	12	41.67%	12	41.67%	12	41.67%	12	41.67%
2nd	33	78.78%	33	78.78%	33	69.69%	33	69.69%	32	75.00%	30	83.33%	30	70.00%	31	70.97%	31	70.97%
3rd	32	81.25%	31	80.64%	31	74.19%	31	74.19%	31	70.97%	31	74.19%	31	77.42%	31	77.42%	30	83.33%
4th	24	62.50%	22	63.63%	23	60.86%	22	50.00%	23	69.57%	24	58.33%	25	60.00%	27	59.26%	26	61.54%
5th	26	73.07%	26	80.76%	28	67.85%	27	62.96%	30	60.00%	29	51.72%	28	57.14%	28	64.29%	28	75.00%
6th	17	70.59%	17	58.82%	16	43.75%	16	37.50%	17	35.29%	17	41.18%	18	44.44%	17	47.06%	16	43.75%
7th	17	82.35%	17	76.47%	17	70.58%	17	64.71%	16	62.50%	16	62.50%	16	62.50%	16	68.75%	16	68.75%
8th	15	80.00%	15	80.00%	15	80.00%	16	62.50%	16	81.25%	16	68.75%	15	80.00%	15	80.00%	15	80.00%
9th	11	54.54%	10	50.00%	10	50.00%	10	50.00%	10	60.00%	10	50.00%	9	55.55%	9	55.56%	9	44.44%
10th	16	93.75%	16	81.25%	16	81.25%	16	75.00%	16	68.75%	16	68.75%	17	70.59%	17	76.47%	17	70.59%
11th	10	70.00%	10	70.00%	10	60.00%	10	60.00%	10	60.00%	10	60.00%	10	50.00%	10	50.00%	10	50.00%
12th	11	36.36%	11	45.45%	11	36.36%	11	36.36%	11	36.36%	11	45.45%	11	36.36%	11	36.36%	11	36.36%
Schoolwide	**239**	**72.29%**	**233**	**70.05%**	**235**	**62.00%**	**234**	**57.39%**	**239**	**60.19%**	**235**	**58.44%**	**236**	**58.13%**	**238**	**59.83%**	**235**	**60.27%**

c. K-5 LaHO Principal Report

ALSEA SCHOOL DISTRICT BOARD REPORT

Name: Heather Shunk **Position:** Principal

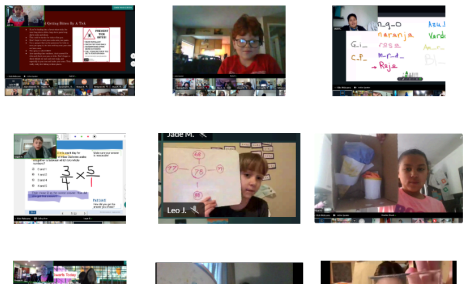
BOARD MEETING DATE: June 10, 2025

End of Year Assembly on June 12 - Combination spotlight on our last two character traits of the year: IMAGINATIVE and PATIENCE. Student of the Month, wrapping the school year up, summer wishes, 5th Grade Graduation, celebrating birthdays for May, June, July.

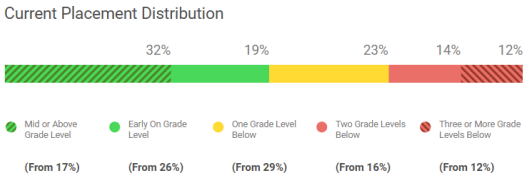
[June, 25 School-Wide Community Newsletter - Link]

📸 Learning in Action 📸

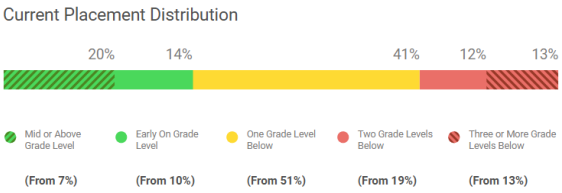
Our students have been busy exploring, creating, collaborating, and growing this year, and we couldn't be prouder! This section gives you a behind-the-scenes look at the incredible learning happening across our virtual classrooms. From hands-on projects to thoughtful discussions, check out these snapshots that show our students truly *learning in action!* 💻🧠✨



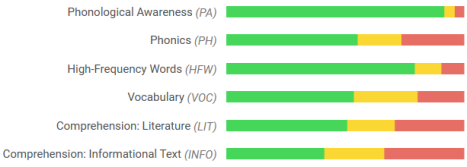
Whole School: IReady Diagnostic Data - Reading



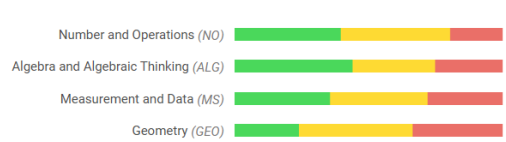
Whole School: IReady Diagnostic Data - Math



Placement By Domain



Placement By Domain



Current Projects and Priorities:

Summative Assessments for Teachers, IA, and Principal - Our summative assessment process for teachers provides a comprehensive reflection on instructional practices, student engagement, and professional responsibilities. Grounded in the Danielson Framework, the evaluation focuses on instructional planning, classroom environment, assessment of student learning, and professional collaboration. This process not only supports accountability, but also promotes professional growth by identifying strengths and areas for improvement. By aligning evaluations with student outcomes and school goals, we ensure a continuous cycle of improvement that benefits both educators and learners.	**Comprehensive Literacy State Development (CLSD) Grant Work** We are actively working on the CLSD Grant application to secure funding that would significantly strengthen our school's literacy instruction from early learning through sixth grade. This grant supports evidence-based practices, high-quality professional development, family engagement, and equitable access to literacy resources. If awarded, the CLSD Grant would enable us to enhance reading and writing instruction, close achievement gaps, and provide targeted support for multilingual learners and students in underserved communities. This opportunity aligns with our school's mission to ensure all students become confident, capable readers and communicators.	**Priority Standards and Proficiency-Based Learning** Our school is actively focused on implementing clearly defined priority standards in K–6 English Language Arts and Math starting SY 25-26.. These essential standards were identified in collaboration with our curriculum support teams from I-Ready (Math) and Savvas (ELA) to ensure alignment with high-impact, research-based instruction. To support clarity and transparency, we are also developing parent-friendly 1–4 proficiency rubrics that clearly describe what student progress looks like at each level. This work is a critical step in our district's commitment to proficiency-based learning, helping every student focus on mastering the most essential skills for long-term success. **Example**: [Kindergarten Math & ELA Priority Standards and Rubric Link]

d. Athletics and Activities

Board Report – 6/10/25

Summary:

Middle school (7-8) academic and sports awards will take place on 6/11/25 along with 8th grade promotion. The awards will start at 7pm and promotion will take place following the awards. There will be a rising 9th grade parent meeting at 6:15 the same evening. This will be facilitated by Ms. Nieraeth and Ms. Wilson.

MWL held our last meeting of the year on June 4th. We voted on the HS basketball schedule for next year. The schedule is a 1 league game schedule then all other scheduled games will be considered non-league. The rationale for this change is so the more competitive schools can schedule accordingly. We are still finalizing these schedules; I should have this complete prior to leaving for the summer.

We also voted to welcome Falls City and ECHS into the MS league. This gives the league 10 teams for FB and 9 teams for VB. Mannahouse of Eugene has been absorbed by ECHS so they are now beginning their program building. Another vote was taken concerning MS basketball schedule which will be a split schedule for next year. The MS girls will play their season first and then boys will play second. Split schedules give schools flexibility for facility scheduling where only one gym is available.

MS girls will begin their season on Nov. 10th, and the tournament will be on Jan 24. MS boys will begin their season on Jan 21, and the tournament will be March 21.

The PBIS committee met for the final time this school year to finalize our school wide expectations matrix. This provides specific, consistent behavioral expectations from one classroom to the next and in all the common areas of the school.

Update on Parent/Coaches meeting for Fall sports. Looking at August 5.

e. Business Manager Report

Financial Summary – May 31, 2025

General Fund Resources

- State School Support – The ODE issued the final computation for the 23-24 and 24-25 SSF. As shared last month, the IEP figure was updated by the ODE, which caused a significant loss of funding for 23-24, $87,988.85. The 24-25 SSF estimate is based on projected figures. As with the 23-24 SSF final payment, it will not be made until all audited figures by all school districts have been submitted and will be made in May 2023. Included in the statements is the final computation for 23-24 SSF and estimated figures for 24-25 SSF.
- Property taxes – the statements reflect tax turnover through April 30. The remaining amounts projected are per the SSF estimates. May through July collections will be recorded in the 24-25 fiscal year.
- 1312 – Tuition from Other Districts – payment for students attending the Learn at Home Online that are residents of another district and reported by that district to the ODE for funding purposes.
- 1510 - Earnings on investments – The earnings rate with the Local Government Investment Pool (LGIP) is 4.60%, the same as the prior month. The district is earning approximately $35,000 per month, which is allocated to the various funds that have cash balances.
- No changes in the other revenues.

General Fund Expenditures

- All salaries and benefits have been encumbered, as well as projections for substitutes and additional salaries are included in the financial statements. The substitute and additional salaries are based on the average for September through May. The month of June will have three payrolls for all licensed and classified staff. The district will be paying off all employee agreements in June.
- As shared prior months, all non-payroll items have also been encumbered.
- Ending Cash Balance – The ending cash balance is project at $6.4 million. $6.7 million was used as the beginning cash balance for the 25-26 proposed budget. The difference is due to the SSF loss. However, as shared in the budget meetings, unemployment and PERS rate change compared to the amount budgeted will offset a major portion of this loss.

Special Revenue

- All claims have been made for funds spent year to date. All grants are being monitored to ensure dollars are spent by the end of the grant period to ensure completion by the end of the grant period.
- The district received a $10,000 grant from Benton County for the kitchen design. These funds have been expended.

Food Service Program

- Included are the student participation, financial statements and per meal breakdown through 5/31/25. The attached statement reflects the participation by month, with the annual participation at 66.1% for the breakfast program; 65.8%, lunch program.
- The projected transfer from the General Fund will be approximately $54,936.53. The average cost per meal is $5.88 while reimbursement is $4.26, or a transfer from the General Fund of $1.62 per meal.

Debt Service

- No change in the Debt Service, with the projected fund balance ending, is estimated at approximately $32,000.

Capital Projects

- 400 – Capital Projects - reflects interest received on monies at the LGIP. Expenditures are the replacement of the windows, architectural services for the kitchen, and the upgrade to the fire alarm system. Per the Board direction, $140,000 has been transferred into 400, and $560,000 transferred into 430 – Seismic Rehabilitation grant. The fund has approximately $215,000 available for additional projects.
- 410 - Bond 2021 and OSCIM Grant –The financial statements show a remaining balance of $3,698.92. This amount will be used for the initial fee for Phase III – Seismic upgrade. The bond has been completely spent and will be closed by year end.
- 430 – Seismic Rehabilitation – represents approved service contracts. The district has received reimbursement for all invoices through April 30 and has submitted the Mayl claim to the Oregon Business Development Department. Per the grant, claims will be made after each month's end. Per Board direction, $560,000has been transferred into this fund to cover estimated overages.

Internal Service Funds

Unemployment Reserve

- As shared last month, currently the district is charging all salaries approximately 4% on each payroll and transferring the funds into the Unemployment Reserve Fund to cover quarterly unemployment claims. The $9,776 represents claims for the first two quarters of 24-25. However, it is still unknown what the costs will be for Spring and Summer breaks. The reserve will have sufficient funds to cover claims during the 25-26 fiscal year. No payroll costs will be charged during the 25-26 fiscal year for this cost.

PERS Reserve

- No change compared to last month.

GENERAL FUND
STATEMENT OF RESOURCES
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

LINE		SOURCE	BUDGET	Y-T-D 5/31/2025	PROJECTED	TOTAL 5/31/2025	BALANCE OVER/(UNDER)
		STATE SCHOOL SUPPORT FORMULA					
1	1111	CURRENT YEAR'S TAXES	**$ 528,200.00**	$ 517,075.85	11,110.05	**$ 528,185.90**	**$ (14.10)**
2	1112	PRIOR YEAR'S TAXES	**1,000.00**	137.45	862.55	**1,000.00**	**-**
3	1114	OTHER TAXES	**-**	14.10	-	**14.10**	**14.10**
4	1190	INTEREST ON TAX COLLECTIONS	**800.00**	538.52	261.48	**800.00**	**-**
5	2101	COUNTY SCHOOL FUND	**-**	-		**-**	**-**
6	3103	COMMON SCHOOL FUND	**41,205.00**	20,026.41	20,026.41	**40,052.82**	**(1,152.18)**
7	3101	STATE SCHOOL SUPPORT FUND	**4,527,702.00**	4,312,627.15	-	**4,312,627.15**	**(215,074.85)**
8	4801	FEDERAL FOREST FEES	**-**	-	-	**-**	**-**
9		**TOTAL 2024-25 SSSF SOURCES (Line 1 - Line 8)**	**5,098,907.00**	**4,850,419.48**	**32,260.49**	**4,882,679.97**	**(216,227.03)**
		STATE SCHOOL SUPPORT FORMULA (Prior Yr Adjustments)					
10		STATE SCHOOL SUPPORT FUND 23-24		**(87,988.85)**		**(87,988.85)**	**(87,988.85)**
11		HIGH COST GRANT				**-**	**-**
12		**TOTAL SSSF PRIOR YR ADJ (Line 10 - Line 11)**	**-**	**(87,988.85)**	**-**	**(87,988.85)**	**(87,988.85)**
13		**TOTAL SSSF SOURCES (Line 9 + Line 12)**	**5,098,907.00**	**4,762,430.63**	**32,260.49**	**4,794,691.12**	**(304,215.88)**
		NON STATE SCHOOL SUPPORT FORMULA SOURCES					
		LOCAL SOURCES					
14	1312	TUITION FROM OTHER DISTRICTS	**-**	14,160.21	-	**14,160.21**	**14,160.21**
15	1510	EARNINGS ON INVESTMENTS	**50,000.00**	359,720.56	30,000.00	**389,720.56**	**339,720.56**
16	1710	ADMISSIONS - GATE FEES	**7,500.00**	3,271.75	-	**3,271.75**	**(4,228.25)**
17	1760	FUND RAISING	**-**	-	-	**-**	**-**
18	1910	RENTAL INCOME	**3,600.00**	4,224.00	-	**4,224.00**	**624.00**
19	1943	SERVICES PROVIDED CHARTER SCHOOLS	**72,198.00**	42,438.46	29,759.54	**72,198.00**	**-**
20	1960	RECOVER PRIOR YEAR'S EXPENDITURES	**-**	-	-	**-**	**-**
21	1920	DONATIONS	**-**	2,000.00	-	**2,000.00**	**2,000.00**
22	1980	FEES CHARGED OTHER GRANTS	**-**	-	-	**-**	**-**
23	1990	MISCELLANEOUS REVENUE	**24,800.00**	18,649.36		**18,649.36**	**(6,150.64)**
24		**TOTAL LOCAL SOURCES (Line 14 - Line 23)**	**158,098.00**	**444,464.34**	**59,759.54**	**504,223.88**	**346,125.88**
		OTHER SOURCES					
25	2102	REVENUE THROUGH ESD	**7,600.00**	7,027.04	-	**7,027.04**	**(572.96)**
26	2199	OTHER INTERMEDIATE SOURCES	**-**	-	-	**-**	**-**
27	3203	SPECIAL EDUCATION PROGRAMS	**-**	-	-	**-**	**-**
28	5300	INSURANCE REIMBURSEMENT	**-**	38,581.73	-	**38,581.73**	**38,581.73**
29	5400	BEGINNING CASH	**6,700,000.00**	6,716,065.45		**6,716,065.45**	**16,065.45**
30		**TOTAL OTHER SOURCES (Line 25 - Line 29)**	**6,707,600.00**	**6,761,674.22**	**-**	**6,761,674.22**	**54,074.22**
31		**TOTAL NON SSSF SOURCES (Line 24 + Line 30)**	**6,865,698.00**	**7,206,138.56**	**59,759.54**	**7,265,898.10**	**400,200.10**
32		**TOTAL RESOURCES (Line 13 + Line 31)**	**$ 11,964,605.00**	**$ 11,968,569.19**	**$ 92,020.03**	**$ 12,060,589.22**	**$ 95,984.22**

Alsea School District 7J

Change in State School Support Formula Estimates

		23-24			24-25	
	ODE	2/21/2025	4/29/2025	Budget		4/29/2025
	Weight	Total	ADMw	Total	ADMw	ODE
ADMr	1.00	265.48	265.48	295.00	295.00	222.13
ESL	0.50	6.84	3.42	8.00	4.00	1.69
Pregnant and Parenting	1.00	-	-		-	
IEP	1.00	29.20	29.20	42.00	32.45	24.43
IEPs above 11%	1.00	25.40	3.80	2.30	2.30	3.80
Students in Poverty	0.25	29.00	7.25	29.00	7.25	6.50
Foster Care	0.25	1.00	0.25	1.00	0.25	
Remote Elementary	1.00	38.82	38.82		-	38.82
Small High School	1.00	50.46	50.46	53.86	53.86	50.46
Total ADMw		446.20	398.68	431.16	395.11	347.83
Prior Yrs ADMw			613.44			398.68
Greater ADMw Amt between Yrs			**613.44**		**395.11**	**397.18**
Base Amount			$ 4,500.00		$ 4,500.00	$ 4,500.00
Teacher Experience Base Amount			$ 25.00		$ 25.00	$ 25.00
Experience			(5.14)		(2.30)	(5.14)
Teacher Experience Amount			(128.00)		(57.50)	(128.50)
Total Base Amount			$ 4,372.00		$ 4,442.50	$ 4,371.50
Ratio			2.24497447271		2.34088952892	2.33731801238
State School Funding Per ADMw			**$ 9,813.91**		**$ 10,399.40**	**$ 10,217.59**
General Purpose Grant			**$ 6,020,271**		**$ 4,108,907**	**$ 4,073,576**
Transportaiton			955,318.00		1,100,000.00	900,000.00
Percent			90%		90%	90%
Transportation Grant			**859,787**		**$ 990,000.00**	**$ 810,000.00**
Rounding						
Total Formula Revenue			**$ 6,880,058**		**$ 5,098,907**	**$ 4,883,576**
Less Local Collections						
Property Taxes			508,832		530,000	530,000
Common School			51,631 -		41,205	40,053
County School			6,305		-	-
Federal Forest Fees			-		-	-
Total Local Offsets			**566,768**		**571,205**	**570,053**
State School Support Formula			**$ 6,313,290**		**$ 4,527,702**	**$ 4,313,523**
Food Service Match						**$ (896)**
State School Support Payments			**$ 6,401,278**			**$ 4,312,627**
May 2025 Adjustment			**$ (87,988)**			

GENERAL FUND
STATEMENT OF EXPENDITURES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

		BUDGET	ACTUAL Y-T-D 5/31/2025	ENCUMBERED	TOTAL 5/31/2025	BALANCE FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
INSTRUCTION							
1111	Elementary, K-5	$ 1,336,914.00	$ 819,051.14	$ 242,615.80	$ 1,061,666.94	$ 275,247.06	
1113	Elementary Extra-curricular	3,864.00	3,130.55	476.08	3,606.63	257.37	
1121	Middle/Junior High Programs	271,397.00	193,912.78	63,233.92	257,146.70	14,250.30	
1122	Middle/Junior High School Extra-curricular	36,686.00	36,949.40	260.17	37,209.57	(523.57)	
1131	High School Programs	390,968.00	276,638.55	82,315.40	358,953.95	32,014.05	
1132	High School Extra-curricular	149,995.00	110,307.48	4,767.97	115,075.45	34,919.55	
1250	Less Restrictive Programs: Students w/ Disability	636,673.00	292,807.20	87,136.03	379,943.23	256,729.77	
1291	English Second Language Programs	8,359.00	1,293.05	142.83	1,435.88	6,923.12	
	TOTAL INSTRUCTION	2,834,856.00	1,734,090.15	480,948.20	2,215,038.35	619,817.65	78.14%
SUPPORT SERVICES							
2113	Social Work Services	-	3,947.53	1,321.43	5,268.96	(5,268.96)	
2114	Student Accounting Services	28,801.00	27,101.90	2,483.80	29,585.70	(784.70)	
2134	Nurse Services	12,000.00	8,325.24	-	8,325.24	3,674.76	
2142	Psychological Testing Services	50,200.00	-	13,425.00	13,425.00	36,775.00	
2152	Speech Pathology Services	65,900.00	-	22,327.00	22,327.00	43,573.00	
2160	Other Student Treatment Services	39,500.00	-	26,850.00	26,850.00	12,650.00	
2190	Service Direction, Student Support Services	82,526.00	51,801.70	10,015.79	61,817.49	20,708.51	
2210	Improvement of Instruction Services	-	154.96	12.33	167.29	(167.29)	
2222	Library/Media Center	1,250.00	-	-	-	1,250.00	
2230	Assessment and Testing	4,368.00	3,578.38	714.05	4,292.43	75.57	
2240	Instructional Staff Development	26,000.00	123.60	-	123.60	25,876.40	
2310	Board of Education Services	161,200.00	52,531.83	8,705.20	61,237.03	99,962.97	

GENERAL FUND
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

			BUDGET	ACTUAL Y-T-D 5/31/2025	ENCUMBERED	TOTAL 5/31/2025	BALANCE FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
2321		Office of the Superintendent Services	266,441.00	212,158.93	19,177.52	231,336.45	35,104.55	
2410		Office of the Principal Services	502,660.00	366,193.23	70,164.32	436,357.55	66,302.45	
2520		Fiscal Services	355,450.00	221,056.45	29,888.73	250,945.18	104,504.82	
2540		Operation and Maintenance of Plant Services	609,241.00	407,841.22	60,169.69	468,010.91	141,230.09	
2550		Student Transportation Services	1,009,576.00	730,559.06	122,481.16	853,040.22	156,535.78	
2660		Technology Services	117,316.00	58,388.17	4,936.16	63,324.33	53,991.67	
2700		Supplemental Retirement Program	-	-	-	-	-	
		TOTAL SUPPORT SERVICES	3,332,429.00	2,143,762.20	392,672.18	2,536,434.38	795,994.62	76.11%
OTHER REQUIREMENTS								
5200		Transfers of Funds						
5200	790	Food Service	123,405.00	-	54,936.53	54,936.53	68,468.47	
5200	792	Bus Fund	140,002.00	140,002.00		140,002.00	-	
5200	795	Special Revenue	-	1,524.80		1,524.80	(1,524.80)	
5200	794	Capital Projects	700,000.00	700,000.00		700,000.00	-	
6110		Operating Contingency	500,000.00	-		-	500,000.00	
7000		Unappropriated Ending Fund Balance	4,333,913.00	-		-	4,333,913.00	
		TOTAL OTHER REQUIREMENTS	5,797,320.00	841,526.80	54,936.53	896,463.33	4,900,856.67	15.46%
		TOTAL EXPENDITURES	$ 11,964,605.00	$ 4,719,379.15	$ 928,556.91	$ 5,647,936.06	$ 6,316,668.94	47.21%
PROJECTED ENDING FUND BALANCE			$ -			$ 6,412,653.16	$ 6,412,653.16	

SPECIAL REVENUE FUNDS

STATEMENT OF GRANTS AND OTHER SPECIAL REVENUE FUNDS

					REVENUE				EXPENDITURES			
#	Fund Title	End Date	Grant Amount	Beginning Cash	Y-T-D	PROJECTED	Transfer from General Fund	TOTAL	Y-T-D	Encumbered	TOTAL	Balance
200	Donations			$ 3,132.95	$ 500.00			$ 3,632.95	$ 902.80	$ 500.00	$ 1,402.80	$ 2,230.15
203	Title I-A	9/30/2024	10,797.33	-	6,784.74	4,012.59		10,797.33	10,797.33		10,797.33	
203	Title I-A	9/30/2025	50,857.00		33,180.28	17,676.72		50,857.00	36,627.18	8,767.88	45,395.06	
203	**Total Title I**		**61,654.33**		**39,965.02**	**21,689.31**		**61,654.33**	**47,424.51**	**8,767.88**	**56,192.39**	**5,461.94**
205	Small Rural School Achievement (SRSA)	9/30/2025	54,607.00	-	**44,354.58**	**10,252.42**		**54,607.00**	**53,932.58**	-	**53,932.58**	**674.42**
207	Youth Transition Program	9/15/2024	4,972.97	-	**4,972.97**	-		**4,972.97**	**4,972.97**	-	**4,972.97**	-
207	Preemployment Transition Program	6/30/2025	45,000.00		**19,359.34**	**25,640.66**		**45,000.00**	**3,469.63**	-	**3,469.63**	**41,530.37**
206	Title III-A Immigrant Grant	9/30/2025	224.00	-	**224.00**	-		**224.00**	**224.00**	-	**224.00**	-
208	E-Rate Funds			**26,354.88**	-			**26,354.88**	**26,204.57**	-	**26,204.57**	**150.31**
210	IDEA Part B 611	9/30/2024	18,267.60	-	**18,267.60**	-		**18,267.60**	**18,267.60**	-	**18,267.60**	-
210	IDEA Part B 611	9/30/2026	60,260.33		**13,479.39**	**46,780.94**		**60,260.33**	**38,278.57**	**19,627.28**	**57,905.85**	
210	**Total IDEA Part B 611**		**78,527.93**		**31,746.99**	**46,780.94**		**78,527.93**	**56,546.17**	**19,627.28**	**76,173.45**	**2,354.48**
213	Special Education Stipend	6/30/2025	5,091.68		**3,566.88**		**1,524.80**	**5,091.68**	**5,091.68**	-	**5,091.68**	-
216	IDEA Part B 619 FFY24	9/30/2026	401.15		-	**401.15**		**401.15**	-	-	-	**401.15**
220	Title II-A - Teacher Quality 23-24	9/30/2024	5,305.66	-	**5,305.66**	-		**5,305.66**	**5,305.66**	-	**5,305.66**	-
220	Title II-A - Teacher Quality 23-24	9/30/2025	7,236.00	-	**1,153.11**	**6,082.89**		**7,236.00**	**1,153.11**		**1,153.11**	**6,082.89**
220	Title IV-A - Student Support and Academic Enrichment 23-24	9/30/2024	10,000.00	-	**10,000.00**	-		**10,000.00**	**10,000.00**		**10,000.00**	-
220	Title IV-A - Student Support and Academic Enrichment 23-24	9/30/2025	10,981.00		-	**10,981.00**		**10,981.00**		-	-	**10,981.00**
220	**Title V- B REAP**		**33,522.66**		**16,458.77**	**17,063.89**		**33,522.66**	**16,458.77**	-	**16,458.77**	**17,063.89**
227	Early Literacy Grant	6/30/2025	59,749.82	-	**59,749.82**	-		**59,749.82**	**45,131.61**	**14,618.21**	**59,749.82**	-
228	After School Programs	6/30/2025	3,000.00	-	**3,000.00**	-		**3,000.00**	**3,000.00**	-	**3,000.00**	-
	ESSER											
232	ESSER III	9/30/2024	91,992.21	-	**91,992.21**	-		**91,992.21**	**91,992.21**	-	**91,992.21**	-
	Integrated Guidance											
226	Early Indicator Intervention	6/30/2025	$ 806.31	$ -	$ 107.33	$ 698.98		$ 806.31	$ 132.53	$ -	$ 132.53	673.78
248	Federal School Improvement Funds to CSI & TSI Schools 22-23	9/30/2025	51,290.93	-	**33,944.40**	**17,346.53**		**51,290.93**	**38,084.16**	**11,227.76**	**49,311.92**	**1,979.01**
251	Student Investment Account - Y1	9/30/2024	152,036.58	-	**152,036.58**	-		**152,036.58**	**152,036.58**	-	**152,036.58**	-
251	Student Investment Account - Y2	6/30/2025	518,906.68	-	**518,906.68**	-		**518,906.68**	**371,269.56**	**115,653.01**	**486,922.57**	**31,984.11**
252	High School Success M98 - Y1	8/31/2025	581.94		**581.94**	**0.00**		**581.94**	**581.94**			

SPECIAL REVENUE FUNDS

STATEMENT OF GRANTS AND OTHER SPECIAL REVENUE FUNDS

					REVENUE				EXPENDITURES			
#	Fund Title	End Date	Grant Amount	Beginning Cash	Y-T-D	PROJECTED	Transfer from General Fund	TOTAL	Y-T-D	Encumbered	TOTAL	Balance
252	High School Success M98 - Y2	6/30/2025	98,065.21	-	65,791.99	32,273.22		98,065.21	79,582.22	17,894.00	97,476.22	588.99
	Total Integrated Guidance		**821,687.65**		**771,368.92**	**50,318.73**	**-**	**821,687.65**	**641,686.99**	**144,774.77**	**786,461.76**	**35,225.89**
257	Baseball/Softball Program		-	3,706.92	-			3,706.92	-	-	-	3,706.92
256	Carl Perkins		6,731.81	-	4,415.53	2,316.28		6,731.81	6,731.81	-	6,731.81	-
259	Student Activity Funds		-	46,945.70	22,323.68			69,269.38	13,254.43	803.12	14,057.55	55,211.83
263	Outdoor School	6/30/2025	13,100.87	-	-	13,100.87		13,100.87	12,815.23	285.64	13,100.87	-
265	Menstrual Dignity Act	6/30/2025	859.97	-	859.97	-		859.97	859.97	-	859.97	-
272	TAP Sesimic Grant	12/31/2025	14,000.00	-	-	14,000.00		14,000.00	14,000.00	-	14,000.00	-
290	Bus Replacement Fund		-	87,316.04	347,220.51		140,002.00	574,538.55	416,146.00	-	416,146.00	158,392.55
298	Nutrition Services Grants											
126	Breakfast After the Bell Equipment	6/30/2025	176.29		-	176.29		176.29	176.29		176.29	(0.00)
127	Fresh Fruit and Vegetable Program 24-25	9/30/2025	15,096.00	-	632.10	14,463.90		15,096.00	3,194.40	11,901.60	15,096.00	-
128	Kitchen Design		10,000.00		10,000.00	-		10,000.00	10,000.00	-	10,000.00	-
299	Nutrition Services		-	-	120,113.57	24,375.72	54,936.53	199,425.82	158,548.24	40,877.58	199,425.82	-
	TOTAL			167,456.49	1,592,824.86	240,580.16	196,463.33	2,197,324.84	1,632,764.86	242,156.08	1,874,920.94	322,403.90

Participation

Month	Days Service	Eligible Students	Participation		Avg per Day		Participation Percentage	
			Breakfast	Lunch	Breakfast	Lunch	Breakfast	Lunch
Aug	4	168	445	401	111.25	100.25	66.2%	59.7%
Sept	17	170	1995	1866	117.35	109.76	69.0%	64.6%
Oct	19	170	2136	2135	112.42	112.37	66.1%	66.1%
Nov	15	170	1706	1617	113.73	107.80	66.9%	63.4%
Dec	12	169	1322	1320	110.17	110.00	65.2%	65.1%
Jan	14	172	1668	1623	119.14	115.93	69.3%	67.4%
Feb	14	171	1531	1,563	109.36	111.64	64.0%	65.3%
Mar	13	169	1454	1,482	111.85	114.00	66.2%	67.5%
April	18	168	1940	2,008	107.78	111.56	64.2%	66.4%
May	16	167	1695	1,822	105.94	113.88	63.4%	68.2%
June	8							
Total/Average	142	169.4	15,892	15,837	111.92	111.53	66.1%	65.8%

24-25 Financial Projection - Food Service Program
As of May 31, 2025

Account	Description	Budget	YTD	Projected	Total
Revenue					
299.0000.1610.000.000.000	Daily Sales -Adult Sales	$ 4,500.00	$ 1,622.75	$ 91.42	$ 1,714.17
299.0000.3102.000.000.000	State School Fund - School Lunch Match	-	895.70	1,099.63	$ 1,995.33
299.0000.3299.000.000.121	State: Breakfast	4,500.00	357.70	1,722.14	2,079.84
299.0000.3299.000.000.122	State: Lunch	7,300.00	545.36	2,814.47	3,359.83
299.0000.4500.000.000.000	NSLP USDA Entitlement	-	-		$ -
299.0000.4500.000.000.123	SNP: Breakfast	58,000.00	38,236.98	6,975.85	45,212.83
299.0000.4500.000.000.124	SNP: Lunch	68,201.00	60,263.71	11,672.21	71,935.92
299.0000.4500.000.000.124	Supply Chain		9,632.37		9,632.37
299.0000.4910.000.000.000	Federal Commodities	1,000.00	8,559.00		8,559.00
	Total Revenue	$ 143,501.00	$ 120,113.57	$ 24,375.72	$ 144,489.29
Expenditures		**Budget**	**YTD**	**Encumbered**	**Total**
299.3100.0112.000.000.000	Classified Salaries	$ 50,105.00	$ 35,819.12	$ 12,381.35	$ 48,200.47
299.3100.0122.000.000.000	Substitutes - Classified	-	2,062.32	-	2,062.32
299.3100.0132.000.000.000	Additional Salary - Classified	1,200.00	88.60	-	88.60
299.3100.0211.000.000.000	Employer Contrib PERS	12,841.00	9,503.90	3,099.04	12,602.94
299.3100.0212.000.000.000	Employee Contribution Pick-Up	3,078.00	2,278.19	742.89	3,021.08
299.3100.0220.000.000.000	Social Sec/Medicare	3,925.00	2,904.75	947.19	3,851.94
299.3100.0231.000.000.000	Worker's Compensation	1,183.00	944.32	302.83	1,247.15
299.3100.0232.000.000.000	Unemployment Compensation	8,627.00	1,368.60	416.17	1,784.77
299.3100.0233.000.000.000	PFMLI	205.00	151.87	49.53	201.40
299.3100.0242.000.000.000	Group Health Insurance	32,400.00	16,199.73	5,406.46	21,606.19
299.3100.0342.000.000.000	Travel, Out of District	-	747.10	-	747.10
299.3100.0380.000.000.000	Non-instructional Professional and Technical Servi	2,000.00	1,299.00	-	1,299.00
299.3100.0410.000.000.000	Consumable Supplies and Materials	1,000.00	645.05	-	645.05
299.3100.0413.000.000.000	Freight for Commodities	-	518.44	-	518.44
299.3100.0450.000.000.000	FOOD	96,342.00	42,692.13	9,762.12	52,454.25
299.3100.0451.000.000.000	Federal Commodities	10,000.00	8,559.00	-	8,559.00
299.3100.0460.000.000.000	Non-consumable Items	1,000.00	551.12	-	551.12
299.3100.0470.000.000.000	Computer Software (Meal Time)	-	1,135.00	-	1,135.00
299.3100.0541.000.000.000	Initial and Additional Equipment Purchase	5,000.00	-	-	-
299.3100.0640.000.000.000	Dues and Fees (Corvallis/MealTime)	38,000.00	31,080.00	7,770.00	38,850.00
	Total Expenses	266,906.00	158,548.24	40,877.58	199,425.82
	Net Profit/Loss	(123,405.00)	(38,434.67)	(16,501.86)	(54,936.53)
Other Income					
299.0000.5200.000.000.000	Interfund Transfers	123,405.00	-	54,936.53	54,936.53
299.0000.5400.000.000.000	Resources - Beginning Fund Balance	-	-	-	-
	Total Other Uses	123,405.00	-	54,936.53	54,936.53
	Ending Fund Balance	**$ -**	**$ (38,434.67)**	**$ 38,434.67**	**$ -**

299 - Food Service Program

Analysis per Meal

	Meals Served	Total	Costs per Meal	%
State Reimb per meal				
Adult Sales	403	$ 1,714.17	$ 4.25	
Breakfast	16,787	47,292.67	$ 2.82	
Lunch	16,729	75,295.75	4.50	
Other Sources		$ 11,627.70		
Federal Commodities		8,559.00		
Total Revenue	33,919	$ 144,489.29	$ 4.26	
Payroll Costs		$ 94,666.86	$ 2.79	47.5%
Food Costs		52,454.25	1.55	26.4%
Federal Commodities		8,559.00	0.25	4.3%
Fees		38,850.00	1.15	19.6%
Other		4,895.71	0.14	2.4%
Total Costs		$ 199,425.82	$ 5.88	100%
Net Loss		**$ (54,936.53)**	**$ (1.62)**	

DEBT SERVICE
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

			BUDGET	ACTUAL Y-T-D 5/31/2025	ENCUMBERED	TOTAL 5/31/2025	BALANCE FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
RESOURCES								
1111		CURRENT YEAR'S TAXES	**$ 94,940.00**	$ 95,901.81	**-**	**95,901.81**	**961.81**	
1112		PRIOR YEAR'S TAXES	**500.00**	(66.55)		**(66.55)**	**(566.55)**	
1190		OTHER TAXES	**100.00**	116.03		**116.03**	**16.03**	
1510		INTEREST EARNINGS	**-**	3,454.26		**3,454.26**	**3,454.26**	
5400		BEGINNING FUND BALANCE	**22,392.00**	29,106.43		**29,106.43**	**6,714.43**	
		TOTAL INSTRUCTION	**117,932.00**	**128,511.98**	**-**	**128,511.98**	**10,579.98**	
EXPENDITURES								
5110		Long-Term Debt Service						
5110	610	Redemption of Principal	**35,000.00**	**35,000.00**	**-**	**35,000.00**	**-**	
5110	621	Regular Interest	**61,050.00**	**61,050.00**	**-**	**61,050.00**	**-**	
7000		Unappropriated Ending Fund Balance	**21,882.00**	**-**	**-**	**-**	**21,882.00**	
		TOTAL EXPENDITURES	**117,932.00**	**96,050.00**	**-**	**96,050.00**	**21,882.00**	**81.45%**
PROJECTED ENDING FUND BALANCE			**$ -**	**$ 32,461.98**	**$ -**	**$ 32,461.98**	**$ 32,461.98**	

CAPITAL PROJECTS (400)
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

		BUDGET	ACTUAL Y-T-D 5/31/2025	ENCUMBERED	TOTAL 5/31/2025	BALANCE FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
RESOURCES							
1510	Interest Earnings	**$ -**	$ 12,767.76		**12,767.76**	**(12,767.76)**	
5200	Transfer from General Fund	**700,000.00**	140,000.00		**140,000.00**	**560,000.00**	
5400	Beginning Fund Balance	**274,748.00**	282,454.52		**282,454.52**	**(7,706.52)**	
	TOTAL INSTRUCTION	**974,748.00**	**435,222.28**	**-**	**435,222.28**	**539,525.72**	
EXPENDITURES							
4150	Building Improvement	**974,748.00**	**53,724.99**	**166,528.61**	**220,253.60**	**754,494.40**	
7000	Unappropriated Ending Fund Balance	**-**	**-**	**-**	**-**	**-**	
	TOTAL EXPENDITURES	**974,748.00**	**53,724.99**	**166,528.61**	**220,253.60**	**754,494.40**	**22.60%**
PROJECTED ENDING FUND BALANCE		**$ -**	**$ 381,497.29**	**$ (166,528.61)**	**$ 214,968.68**	**$ 214,968.68**	

BOND 2021 AND OSCIM GRANT (410)
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

		BUDGET	ACTUAL Y-T-D 5/31/2025	ENCUMBERED	TOTAL 5/31/2025	BALANCE FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
RESOURCES							
1510	Interest Earnings	**$ 12,000.00**	$ 9,837.32		**9,837.32**	**(2,162.68)**	
3299	State Grant	**500,000.00**	365,780.04	**-**	**365,780.04**	**(134,219.96)**	
5400	Beginning Fund Balance	**888,000.00**	1,194,155.91		**1,194,155.91**	**306,155.91**	
	TOTAL INSTRUCTION	**1,400,000.00**	**1,569,773.27**	**-**	**1,569,773.27**	**169,773.27**	
EXPENDITURES							
4150	Building Improvement	**1,400,000.00**	**1,518,837.66**	**47,237.39**	**1,566,075.05**	**(166,075.05)**	
7000	Unappropriated Ending Fund Balance	**-**	**-**	**-**	**-**	**-**	
	TOTAL EXPENDITURES	**1,400,000.00**	**1,518,837.66**	**47,237.39**	**1,566,075.05**	**(166,075.05)**	**111.86%**
PROJECTED ENDING FUND BALANCE		**$ -**	**$ 50,935.61**	**$ (47,237.39)**	**$ 3,698.22**	**$ 3,698.22**	

SEISMIC REHABILITATION GRANT (430)
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

		BUDGET	ACTUAL Y-T-D 5/31/2025	ENCUMBERED	TOTAL 5/31/2025	BALANCE FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
RESOURCES							
1510	Interest Earnings	$ -	$ -		-	-	
3299	State Grant	2,480,080.00	330,000.00	2,150,080.00	2,480,080.00	-	
5200	Transfer from General Fund	-	560,000.00		560,000.00	560,000.00	
	TOTAL INSTRUCTION	2,480,080.00	890,000.00	2,150,080.00	3,040,080.00	560,000.00	
EXPENDITURES							
4150	Building Improvement	2,480,080.00	351,190.74	2,454,967.89	2,806,158.63	(326,078.63)	
7000	Unappropriated Ending Fund Balance	-	-	-	-	-	
	TOTAL EXPENDITURES	2,480,080.00	351,190.74	2,454,967.89	2,806,158.63	(326,078.63)	113.15%
PROJECTED ENDING FUND BALANCE		$ -	$ 538,809.26	$ (304,887.89)	$ 233,921.37	$ 233,921.37	

INTERNAL SERVICES
STATEMENT OF EXPENDITUES COMPARED TO BUDGET
FOR THE FISCAL YEAR 2024-25
As of May 31, 2025

UNEMPLOYMENT RESERVE

UNEMPLOYMENT RESERVE		BUDGET	ACTUAL 5/31/2025	ENCUMBERED	TOTAL	FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
RESOURCES							
1510	Interest Earnings	**$ -**	$ 4,435.02		**4,435.02**	**4,435.02**	
1970	Services Provided Other Funds	**183,679.00**	169,189.14		**169,189.14**	**(14,489.86)**	
5400	Beginning Fund Balance	**-**	-		**-**	**-**	
	TOTAL INSTRUCTION	**183,679.00**	**173,624.16**	**-**	**173,624.16**	**(10,054.84)**	
EXPENDITURES							
2640	Unemployment	**183,679.00**	**9,776.59**	**-**	**9,776.59**	**173,902.41**	
7000	Unappropriated Ending Fund Balance	**-**	**-**	**-**	**-**	**-**	
	TOTAL EXPENDITURES	**183,679.00**	**9,776.59**	**-**	**9,776.59**	**173,902.41**	**5.32%**
PROJECTED ENDING FUND BALANCE		**$ -**	**$ 163,847.57**	**$ -**	**$ 163,847.57**	**$ 163,847.57**	

PERS RESERVE

		BUDGET	ACTUAL 5/31/2025	ENCUMBERED	TOTAL	FAVORABLE/ (UNFAVORABLE)	--%-- COMMITTED
RESOURCES							
1510	Interest Earnings	**$ -**	$ 480.86		**480.86**	**480.86**	
1970	Services Provided Other Funds	**-**	32,375.45		**32,375.45**	**32,375.45**	
5400	Beginning Fund Balance	**-**	-		**-**	**-**	
	TOTAL INSTRUCTION	**-**	**32,856.31**	**-**	**32,856.31**	**32,856.31**	
EXPENDITURES							
2640	PERS	**-**	**-**	**-**	**-**	**-**	
7000	Unappropriated Ending Fund Balance	**-**	**-**	**-**	**-**	**-**	
	TOTAL EXPENDITURES	**-**	**-**	**-**	**-**	**-**	
PROJECTED ENDING FUND BALANCE		**$ -**	**$ 32,856.31**	**$ -**	**$ 32,856.31**	**$ 32,856.31**	

f. Construction and Seismic Report

Alsea School District
Construction Manager's Report

Report Date: June 4, 2025

GENERAL OVERVIEW

A special Board meeting was held May 19 to review Todd Construction's GMP for the Seismic Renovations project. The Board approved additional funds to address budget overrun in the final design after the cost-cutting exercise was completed. The budget summary included in this report shows the adjusted budget with these additional funds. Construction began May 12 with abatement and floor demolition in the locker rooms. Additional work began in the staff room the week of June 1. The remaining work areas will begin after school is out on June 16. Construction completion is scheduled for August 29.

The second Seismic Grant application for the High School Classroom Wing was not approved in this year's round. The engineer will resubmit that application as well as one for the Elementary School Wing at the end of this year for potential acceptance in May 2026.

The Fire Alarm Replacement work is scheduled to begin on June 16 after school is out. We're coordinating their work with the Gym Seismic project team.

PROJECT TEAM

No additions

BUDGET

The updated budget summaries for the various projects are provided below with comments for each.

Gym Seismic

The updated budget summary for the Gym Seismic project is provided below. The final construction cost has been added and all costs have been committed. The current owner's contingency budget of $78.9k is for unforeseen costs as well as selected improvements requested by the District and approved by the Board.

To date, 15% of the project budget has been spent.

INTEGRITY MANAGEMENT SOLUTIONS LLC
18525 Van Horn Road, Alsea, Oregon 97324
(541) 452-1919 (541) 760-5885

Alsea School Gym Seismic Project Budget Summary - Updated June 1, 2025

Income

	Original Budget	Current Budget	Actual Income To-Date	Notes
Seismic Grant	$ 2,480,000.00	$ 2,480,000.00	$ 2,480,000.00	Grant awarded June 2024
Early Design Not Funded by Seismic Grant (cannot be reimbursed)	$ -	$ (8,808.47)	$ (8,808.47)	Initial effort by structural engineer before grant fund contract executed. Required to keep project on schedule.
Additional Funds	$ -	$ 560,000.00	$ 560,000.00	Addition funds authorized by Board April 15 and May 19.
Totals	**$ 2,480,000.00**	**$ 3,031,191.53**	**$ 3,031,191.53**	

Expenses

	Original Budget	Current Budget	Committed Costs	Paid To-Date	Notes
Construction Cost	$ 1,800,000.00	$ 2,360,915.00	$ 2,360,915.00	$ 26,500.00	Costs for construction contractors
Design Fees	$ 300,000.00	$ 323,625.00	$ 323,625.00	$ 233,431.96	Fees for architect & engineer
Consultant Fees	$ 60,000.00	$ 71,890.93	$ 71,890.93	$ 46,482.93	Fees for geotech, matl testing and special inspections
Project Management	$ 111,600.00	$ 111,600.00	$ 111,600.00	$ 74,942.00	IMS not-to-exceed fee
Permits & Fees	$ 20,000.00	$ 82,838.93	$ 82,838.93	$ 50,542.93	Jurisdiction fees, BR insurance, BOLI
Other Project Costs	$ 1,000.00	$ 1,469.04	$ 1,469.04	$ 1,469.04	Advertsing & other miscellaneous
Owner's Contingency	$ 187,400.00	$ 78,852.63	NA	NA	For unforeseen costs based on available funds
Totals	**$ 2,480,000.00**	**$ 3,031,191.53**	**$ 2,952,338.90**	**$ 433,368.86**	

Fire Alarm Replacement

The budget summary for the Fire Alarm Replacement project is provided below. No new committed costs have been added. To date, 19% of the project budget has been spent. Note that the budget contains no contingency for unforeseen issues encountered during construction.

Alsea School Fire Alarm Project Budget Summary - Updated June 1, 2025

Income

	Original Budget	Current Budget	Actual Income To-Date	Notes
General Funds	$ 200,000.00	$ 200,000.00	$ 200,000.00	Funds approved by Board 11/24.
Remaining Bond Project Funds		$ 58,206.66	$ 58,206.66	Fund allocation proposed to Board 4/25.
Totals	**$ 200,000.00**	**$ 258,206.66**	**$ 258,206.66**	

Expenses

	Original Budget	Current Budget	Committed Costs	Paid To-Date	Notes
Construction Cost	$ 200,000.00	$ 237,956.66	$ 237,956.66	$ 41,560.00	Costs for construction contractors
Design Fees			$ -	$ -	Design included in SFA contract.
Consultant Fees			$ -	$ -	None expected
Project Management		$ 20,000.00	$ 20,000.00	$ 7,443.00	IMS not-to-exceed fee
Permits & Fees		$ 250.00	$ 250.00	$ 250.00	Jurisdiction fees in construction contracts
Other Project Costs			$ -	$ -	None expected.
Owner's Contingency			NA	NA	
Totals	**$ 200,000.00**	**$ 258,206.66**	**$ 258,206.66**	**$ 49,253.00**	

SCHEDULE

Gym Seismic

Alpine Abatement completed asbestos removal in May. Todd Construction began select demolition work in the locker rooms the week of May 19. The Staff Room was turned over to Todd June 1 to begin work there; the remaining construction areas will be turned over to the contractors on June 16 after school is out.

Major milestones for the project are:

- Locker rooms will be completed in early August
- North gym wall exterior work will be completed in early August
- Stage and staff rooms will be completed in early August
- Admin areas will be completed in late August
- Roof replacement will be completed in late August
- All work will be completed by August 29

Early turn-over of the gym and locker rooms in mid-August may be possible depending on how work progresses, but we won't know for sure until that time.

Fire Alarm Replacement

Salem Fire Alarm is scheduled to begin construction June 16 when school is out. Completion is expected by August 29.

PROJECT-SPECIFIC ACTIVITY

Gym Seismic

Asbestos abatement began on schedule and was completed in mid-May.

Select demolition in locker rooms, including removal of concrete and substrate in the flooring was completed by the end of May. Forms for footing pourback are being installed.

Select demolition in the Staff Room began the week of June 1.

Fire Alarm Replacement

No new activity pending construction starting June 16.

COMMUNICATIONS

IMS monthly reports are being provided to the School Board.

g. Safety Committee Report

5. **New Business**

a. Proposed Budget Approval

Alsea School District 7J
Board Recommendation Form

To: The Board of Directors of Alsea School District
Prepared By: Don Staehely, Business Manager
Date: June 10, 2025

Background:

On May 20st, 2025, the Alsea School District Budget Committee approved the FY 25-26 budget totaling $16,924,161. As required by law, a hearing notice was published in the Albany Democrat – Herald and Corvallis Gazette Times on June 3th, 2025. Prior to the June 10th, 2025 Alsea School District Board Meeting, a budget hearing was held to receive public input on the approved budget for the FY 25-26. Based on the hearing, the board needs to adopt or amend the FY 25-26 Budget Resolution 25 - 08, which includes Adopting the Budget, Making Appropriations, Imposing the Tax, and Categorizing the Tax.

Action Requested:

To approve Resolution 25 – 08, which includes Adopting the Budget, Making Appropriations, Imposing the Tax, and Categorizing the Tax.

Motion Requested:

"I make a motion to adopt Resolution 25 - 08, which includes Adopting the Budget, Making the Appropriations, Imposing the Tax, and Categorizing the Tax as presented."

RESOLUTION 25-08

WHEREAS, the Budget Committee of the Alsea School District No. 7J approved the budget for the fiscal year 2025 - 2026 in the amount of $16,924,161 on May 20, 2025; and

THEREFORE, the resolutions adopting the budget, making appropriations, imposing taxes, and categorizing the tax shall be as follows:

RESOLUTION ADOPTING THE BUDGET

BE IT RESOLVED that the Board of Directors of the Alsea School District No. 7J hereby adopts the budget for fiscal year 2025 - 2026 in the total amount of $ 16,924,161.* This budget is now on file at the District Administration Office, 301 South Third St, Alsea, Oregon

RESOLUTION MAKING APPROPRIATIONS

BE IT RESOLVED that the amounts shown below are hereby appropriated for the fiscal year beginning July 1, 2025, for the following purposes:

100 General Fund	
1000 Instruction….....	$2,755,130
2000 Support Services…….	3,319,447
5200 Interfund Transfers	412,601
6000 Contingency…….....	500,000
**Total……..... **	**$6,987,178**

200 Special Revenue Fund	
1000 Instruction….....	$714,554
2000 Support Services…….	450,872
3000 Enterprise and Community Services .	271,297
4000 Facility Acquistion and Construction	0
5100 Debt Service	91,230
6000 Contingency…….....	0
**Total……..... **	**$1,527,953**

300 Debt Service Fund	
5100 Debt Service	$100,000
**Total……..... **	**$100,000**

400 Capital Projects Fund	
4000 Facility Acquistion and Construction	$3,040,000
**Total……..... **	**$3,040,000**

600 Internal Service Fund	
2000 Support Services…….	$272,192
**Total……..... **	**$272,192**

Total APPROPRIATIONS, All Funds	**$11,927,323**
Total Unappropriated and Reserve Amounts, All Funds	4,996,838
TOTAL ADOPTED BUDGET	**$16,924,161** *

RESOLUTION IMPOSING THE TAX

BE IT RESOLVED that the following ad valorem property taxes are hereby imposed upon the assessed value of all taxable property within the district for tax year 2025-2026 :

(1) In the amount of $ 5.0811 per $1000 of assessed value for permanent rate tax;

(2) In the amount of $104,000 for debt service on general obligation bonds;

RESOLUTION CATEGORIZING THE TAX

BE IT RESOLVED that the taxes imposed are hereby categorized for purposes of Article XI section 11b as:

Subject to the Education Limitation

Permanent Rate Tax.....$ 5.0811/$1000

Excluded from Limitation

General Obligation Bond Debt Service.....$ 104,000

The above resolution statements were approved and declared adopted on June 10, 2025

AYES: _____ NAYS: _____ ABSENT: _____ ABSTAIN: _____

Risteen Follett, Chair Board of Directors

Krista Nieraeth, Superintendent

ATTEST: _____

Lora Nickle, Executive Secretary

b. WHA Insurance Options for 25-26

WHA INSURANCE

Insurance Proposal

Prepared For
Alsea School District #7J
PO Box B
Alsea, OR 97324

Contents

SECTION 1
Executive Summary
About Us
Mission, Vision, Values
Agency Personnel
Your Public Entities Team
Your Workers' Compensation Team
Your Employee Benefits Team
Insurance Services Overview
Property & Casualty Services
Workers' Compensation Services
Employee Benefits Services
Risk Management Services
Contract Liability Services
Safety, Health, & Wellness Services
Risk Management Philosophy
Controlling Premiums
Service Plan
Claims Support
Natl. Incident Management
Online Services

SECTION 2
Policy Information & Schedules

A Legacy of Innovation & Expertise

Personalized Protection & Custom-Tailored Solutions

At WHA Insurance, we don't just provide insurance; we deliver protection, peace of mind, and partnership. With over seven decades of experience, our agency stands as a trusted leader in insurance brokerage and risk management consulting, serving individuals, families, businesses, and public entities across the Pacific Northwest and beyond.

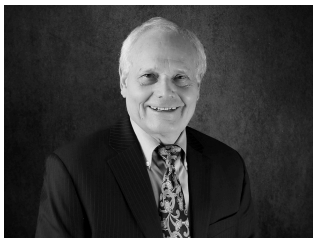
Our personalized approach means that no matter your goals, we design solutions that fit your unique needs. Whether you're protecting your home, growing your business, or safeguarding your community, we can help you create a custom-tailored, cost-effective plan to protect your interests. And since we represent 300+ carriers, our only concern is what's best for you and your business.

About Our Public Entity & Risk Management Services

Since 1990, our agency has specialized in Public Entity insurance and risk management solutions. In 2010, we significantly enhanced our Risk Management services, leading to the development of a unique process that integrates five risk management systems and specialized equipment.

Our Commitment

As the CEO of WHA Insurance, I assure you that we possess extensive experience in all areas of coverage and services and pledge our commitment to not only meet but exceed your expectations.



Jeff Griffin, CEO

(541) 954-5705
jgriffin@whainsurance.com

About Us

Trusted Since 1950. Focused on You

WHA Insurance has been a cornerstone of reliable coverage and personalized service for businesses across the nation since 1950. As an independent insurance agency, we pride ourselves on providing direct access to real people—not robots—who understand your industry and care about protecting what you've built.

Representing 300+ Carriers

We are licensed in all 50 states and represent 300+ carriers, allowing us to craft custom insurance and risk management strategies that align with your company's specific needs. Whether you operate a manufacturing facility or manage a portfolio of commercial properties, our solutions are designed to evolve with your business.

True Risk Management Consulting

At WHA Insurance, our risk management consulting services help organizations reduce uncertainty, safeguard resources, and operate with confidence. We work closely with leadership to identify vulnerabilities in operations, safety, and compliance, then implement tailored strategies to address them. From on-site risk assessments and training to loss analysis and policy reviews, our team delivers practical solutions that lower the total cost of risk.

- ☑ Commercial Insurance
- ☑ Employee Benefits
- ☑ Life Insurance
- ☑ Professional Liability
- ☑ Surplus Lines
- ☑ Cyber Insurance
- ☑ Excess Insurance
- ☑ Personal Lines
- ☑ Risk Management Consulting
- ☑ Workers' Compensation

Mission, Vision, & Values

The following words, phrases, and ideas guide our day-to-day interactions with clients, carrier partners, and team members. We strive for excellence in our mission, vision, and values in all our dealings.

Mission Statement

Our mission is to act in the best interest of our clients as their trusted insurance and risk management advisors.

Vision

The vision we hold for our agency today and tomorrow:

Our Clients

To provide an exceptional client experience as passionate professionals, with care and understanding.

Our Providers

To develop the highest level of trust through effective communication and collaboration.

Our Industry

To be recognized as an innovative industry leader in insurance and risk management services.

Our Team

To foster a culture of support, promoting professional and personal growth and aspirations.

Values

The values that shape our decisions and actions every day:

- Professionalism
- Conduct
- Passion
- Diversity
- Presence
- Integrity
- Generosity
- Active Learning

Leadership Team

Chief Officers
Jeff Griffin, CEO
Winslow Cervantes, President
Kim Matagora, CFO
Cody King, CRO
Tevin Preston, CSGO

Directors
Joshua Frank, Director of Administration
Sarah Kunz, Director of HR
Lorin Williams, Director of Association Management
Nate Cortez, Director of Risk Management

General Commercial

Account Executives
Greg Pesicka
Kristin Nelson
Callan Vaccaro
Sam Morehouse

Service Team
Diane Bertrand
Edward Medina
Allian Boughton

Benefits

Account Executives
Rich Allm
Kim Nicholsen
Marvin Revoal

Service Team
Sam Bianco
Christine Wallace
Holly Bell

Transportation

Account Executives
Cody King
Catrina Stanks
Mark Smith
Alison Smith
Beth Gonzalez
Mike Note
Rhonda Delaney
Stephen Klabo
Tina Sams
Ali Smith
Cameron Crawley
Christe Montero

Service Team
Raelynn Mason
Marissa Lee
Haley Sams
Amy Scott
Paul Mann
Haylee Stevens
Krystle Jackson

Public Entities

Account Executives
Jeff Griffin
Lorin Williams
Nathan Cortez
Winslow Cervantes
Kristin Nelson

Service Team
Steve Silva
Kelly McCorkle
Jealica Bomberger
Karisa Cary
Stephani Kunce
Les Hallman
Dave Pickhardt
Dave Nelson
Brie McComb

Workers' Compensation

Account Executives
Jennifer King
Brad Libolt

Service Team
Sarah Kunz
Sarah Long
Erica Armstrong
LeeAnn Miles

Personal Lines

Account Executives
Sam Morehouse

Service Team
Brian Anacker

Your Public Entities Team

At WHA Insurance, our Public Entities team is dedicated to serving the unique needs of schools, municipalities, and other government organizations.

Jeff Griffin
Account Executive/CEO
(541) 954-5705
jgriffin@whainsurance.com

Winslow Cervantes
Account Executive/President
(541) 284-5113
wcervantes@whainsurance.com

Lorin Williams
Account Executive
(541) 284-5140
lwilliams@whainsurance.com

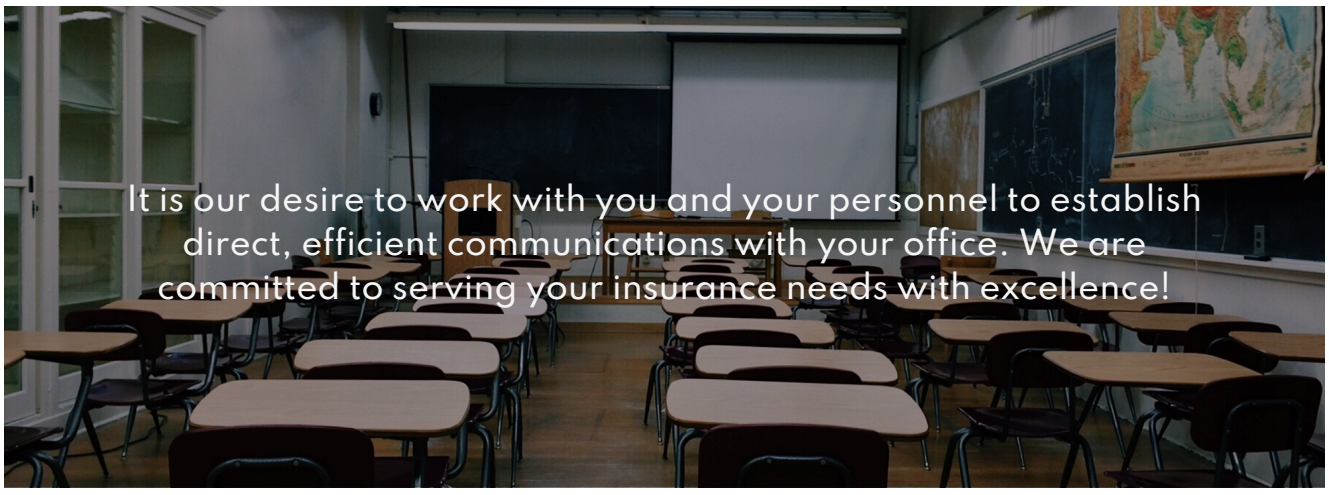
Kristin Nelson
Account Executive
(541) 284-5862
knelson@whainsurance.com

Nathan Cortez
Director of Risk Management
(541) 284-5856
ncortez@whainsurance.com

Steve Silva
Field Service Agent
(541) 284-5116
ssilva@whainsurance.com

Dave Pickhardt
Risk Manager
(541) 484-5434
dpickhardt@whainsurance.com

David Nelson
Risk Consultant
(541) 284-5133
dnelson@whainsurance.com



Your Public Entities Team

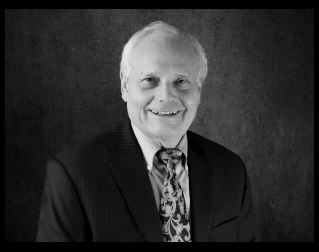
Kelly McCorkle
Account Manager
(541) 284-5861
kmccorkle@whainsurance.com

Jealica Bomberger
Account Manager
(541) 284-5147
jbomberger@whainsurance.com

Stephani Kunce
Account Manager
(541) 284-5137
skunce@whainsurance.com

Karisa Cary
Account Manager
(541) 632-8029
kcary@whainsurance.com

Chloe Crawford
Customer Service Representative
(800) 852-6140
ccrawford@whainsurance.com



Award Winning Service
It is our great honor to announce that our CEO, Jeff Griffin, was given the prestigious award of being one of the Insurance Journal's Agents of the Year. The Insurance Journal's Agents of the Year program is an annual recognition that honors outstanding independent insurance agents across the United States.

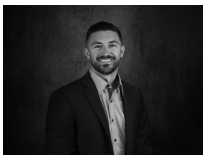
2024 AGENTS OF THE YEAR INSURANCE JOURNAL

https://www.insurancejournal.com/research/research/agents-of-the-year-2024/

Your Workers' Compensation Team

From risk management to claims support, our Workers' Compensation team works to protect the people and institutions that power our communities.

Jennifer King
Senior Account Executive
(541) 284-5835
jking@whainsurance.com



Brad Libolt
Account Executive
(541) 284-5124
blibolt@whainsurance.com

Sarah Kunz
Department Manager
(541) 284-5130
skunz@whainsurance.com

LeeAnn Miles
Account Manager
(541) 632-8027
lmiles@whainsurance.com

Sarah Long
Account Manager
(541) 284-5134
slong@whainsurance.com

Erica Armstrong
Claims Consultant
(541) 284-5146
earmstrong@whainsurance.com

Amanda Murphy
Customer Service Representative
(800) 852-6140
amurphy@whainsurance.com

Your Employee Benefits Team

From plan design to ongoing support, our Employee Benefits team helps employers protect what matters most—their people.

Kim Nicholsen
Senior Account Executive
(541) 284-5842
knicholsen@whainsurance.com

Rich Allm
Senior Account Executive
(541) 284-5853
rallm@whainsurance.com

Samantha Bianco
Department Manager
(541) 284-5849
sbianco@whainsurance.com

Christine Wallace
Account Manager
(541) 284-5837
cwallace@whainsurance.com

Holly Bell
Account Manager
(541) 632-8032
hbell@whainsurance.com

Fawn Tracy
Account Manager
(541) 284-5834
ftracy@whainsurance.com

Insurance Services: Overview

WHA Insurance provides specialized services tailored to the unique needs of school districts. Our primary role is to act as intermediaries between your school district and the insurance companies, ensuring you have the most appropriate and cost-effective insurance coverage. Here are the key service responsibilities of WHA for school districts.

Risk Assessment & Management

WHA will assess the specific risks associated with your operations, including property damage, liability, and the health and safety of all employees. We advise on managing these risks, often suggesting training or operational changes in addition to insurance solutions.

Policy Customization & Selection

Given Oregon's unique insurance requirements for school districts, we customize insurance policies that cover all potential risks. This may include property and casualty insurance, workers' compensation, liability insurance, and specialized coverages such as accident and sickness for volunteers, equipment breakdown, and cyber liability.

Market Research & Comparison

WHA researches insurance markets to find the best policies at competitive rates that meet the specific needs of your school district. We compare offerings from various insurers to recommend the most suitable coverage options.

Claims Assistance & Advocacy

In the event of a claim, WHA assists in the claims process, acting as an advocate on the municipal organization's behalf to ensure fair and prompt settlement by the insurance companies. We help prepare documentation, negotiate with insurers, and provide guidance throughout the claims process.

Review & Adjustment

Insurance needs can evolve as your organization grows and evolves its operations. WHA conducts regular reviews of policies to ensure coverage remains adequate and makes adjustments as necessary. This includes adding or removing coverage, adjusting limits, and updating policies to reflect new assets or operations.

Education & Training

WHA often provides educational resources and training opportunities for school districts and public entity associations. This can include information on risk management, safety protocols, regulatory compliance, best practices for reducing insurance costs, and much more.

Regulatory Compliance & Advisory

WHA ensures that you comply with state and federal insurance regulations and advises on any changes in legislation that might affect insurance requirements or liabilities.

Customer Service

WHA provides responsive, knowledgeable customer service, which is a crucial part of our responsibilities to our clients. This includes answering questions, resolving issues, and being available to discuss concerns about coverage or the insurance market.

In Summary

WHA Insurance provides a comprehensive service that includes risk analysis, policy customization, market research, claims support, and ongoing policy management, all tailored to the unique environment in which school districts operate.

- ☑ Risk Assessment & Management
- ☑ Policy Customization & Selection
- ☑ Market Research & Comparison
- ☑ Claims Assistance & Advocacy
- ☑ Policy Review & Adjustment
- ☑ Education & Training
- ☑ Compliance & Advisory
- ☑ Customer Service

Property & Casualty Services

At WHA, we are dedicated to providing our clients with unparalleled expertise and personalized service. Our mission is to safeguard your assets, mitigate risks, and ensure peace of mind through tailored insurance solutions. Our Property/Casualty Services are designed to address the unique needs of each client, offering a range of services that cover every aspect of risk management and insurance.

1

Risk Assessment and Analysis

WHA evaluates the specific risks associated with the client's property or activities to tailor insurance solutions that meet their needs. Our risk assessment process involves a thorough examination of potential exposures and vulnerabilities, ensuring that every aspect of risk is identified and addressed. This comprehensive analysis enables us to provide targeted recommendations that enhance protection and minimize potential losses.

2

Policy Customization and Placement

We design and secure customized insurance policies that cover various risks, ensuring that the client receives comprehensive protection. By working closely with a broad network of insurers, WHA can offer a wide range of policy options that are specifically tailored to the client's unique risk profile. This ensures that clients receive the most appropriate and cost-effective coverage available.

3

Claims Management and Support

WHA assists clients throughout the entire claims process, from initial notification to final settlement, helping to ensure a smooth and efficient claims experience. Our dedicated claims management team provides guidance, advocacy, and support, aiming to achieve the best possible outcome for our clients.

4

Insurance Renewals and Reviews

Regular reviews and adjustments of insurance policies are essential to reflect changes in the client's circumstances or risk profile. WHA conducts periodic policy reviews to ensure that coverage remains adequate and relevant, making necessary adjustments to adapt to evolving risks and client needs.

5

Market Research and Insights

WHA provides key services such as up-to-date information on market trends, changes in insurance law, and other relevant data that affect property and casualty insurance. Our team continuously monitors the insurance landscape to deliver valuable insights that inform strategic decisions and optimize insurance programs.

6

Risk Management Consulting

Offering advice and strategies to minimize risk, WHA's risk management consulting services include safety training, disaster preparedness planning, and loss prevention strategies. We work with clients to develop and implement proactive measures that reduce the likelihood of losses and enhance overall risk resilience.

7

Legal and Compliance Guidance

It is crucial to ensure that clients' insurance policies comply with local, state, and federal regulations. WHA provides expert legal and compliance guidance to help clients navigate the complex regulatory environment and ensure that their insurance programs meet all necessary legal requirements.

8

Cost Management

WHA prioritizes helping clients manage insurance costs through deductible strategies, coverage limits, and policy bundling. We strive to optimize insurance costs without compromising coverage quality, leveraging our industry expertise to identify and implement cost-saving opportunities.

9

Insurance Program Auditing

Reviewing existing insurance policies and practices to identify areas of overlap or gaps in coverage and making recommendations for improvement is a core service at WHA. Our insurance program audits provide clients with a clear understanding of their current coverage landscape and actionable insights to enhance their insurance portfolio.

10

Specialty Coverage Consultation

A key area of WHA's expertise is assisting clients with obtaining specialized insurance coverage that may not be readily available through standard insurers, such as cyber liability, environmental liability, or professional liability insurance. Our team has extensive experience in securing niche and specialty coverages, ensuring that clients are protected against unique and emerging risks.

In Summary

Through these comprehensive services, WHA is committed to delivering exceptional value and peace of mind to our clients, helping them navigate the complexities of the insurance world with confidence and ease.

Workers' Compensation Services

At WHA, we understand the critical importance of protecting both employees and employers through comprehensive workers' compensation solutions. Our Workers' Compensation Services are designed to ensure compliance, mitigate risks, and manage costs effectively. We offer a full spectrum of services that cater to the unique needs of our clients, helping them maintain a safe and compliant workplace while managing the complexities of workers' compensation.

1

Policy Placement and Management

A cornerstone of our service is helping clients secure workers' compensation insurance policies that meet state requirements and are tailored to their specific needs. WHA works with a broad network of insurers to find the best policy options, ensuring comprehensive coverage that aligns with regulatory standards and the unique risks faced by each client.

2

Risk Assessment and Mitigation

Evaluating workplace risks and recommending safety measures to reduce the likelihood of accidents and injuries is a key service we provide. WHA conducts thorough risk assessments and collaborates with clients to implement effective safety protocols, aiming to create a safer work environment and minimize the occurrence of workplace incidents.

3

Claims Administration Support

A critical component of our service is assisting in the management and administration of claims, including guidance on the claims process and ensuring timely and fair handling. WHA provides expert support throughout the claims process, helping clients navigate the complexities of workers' compensation claims and ensuring that claims are handled efficiently and equitably.

4

Cost Control Strategies

WHA prioritizes providing strategies to control and reduce workers' compensation costs, such as implementing return-to-work programs and safety training sessions. We work with clients to develop cost-effective solutions that reduce the financial impact of workers' compensation claims while promoting a safe and productive workplace.

5

Compliance Assistance

Ensuring that employers comply with all applicable workers' compensation laws and regulations is essential. WHA offers comprehensive compliance assistance, helping clients stay abreast of regulatory changes and ensuring that their workers' compensation programs meet all legal requirements.

6

Audit Support

Assisting clients during workers' compensation insurance audits to ensure accuracy in classification and payroll reporting is a vital service. WHA provides expert guidance and support throughout the audit process, helping clients prepare for audits and ensuring that their reporting is accurate and compliant.

7

Employee Education Programs

Conducting workshops and training for employees on workplace safety and the workers' compensation system is an essential part of our service offering. WHA provides educational programs designed to enhance employee awareness of safety practices and the workers' compensation process, fostering a culture of safety and compliance.

8

Data Analysis and Reporting

Analyzing claims data to identify trends, areas of concern, and opportunities for improvement in workplace safety and claims management is a key service at WHA. Our data analysis capabilities provide clients with valuable insights that inform strategic decisions and drive continuous improvement in their workers' compensation programs.

9

Experience Modification Rate Review

Reviewing and advising on the Experience Modification Rate (EMR), which affects insurance premiums, helping clients understand how it is calculated and how to improve it is a critical service. WHA provides detailed reviews and strategic advice on managing and improving EMR, helping clients reduce their workers' compensation insurance costs.

10

Return-to-Work Programs

An important focus of WHA is developing programs that help injured workers return to work as soon as medically possible. This can reduce the cost of claims and boost employee morale. Our return-to-work programs are designed to facilitate the reintegration of injured employees into the workplace, promoting recovery and reducing the financial impact of workers' compensation claims.

In Summary

Through these comprehensive Workers' Compensation Services, WHA is committed to supporting our clients in maintaining a safe, compliant, and cost-effective workplace. We provide the expertise and resources needed to navigate the complexities of workers' compensation, ensuring that both employees and employers are protected.

Employee Benefits Services

At WHA, we understand that a well-structured employee benefits program is crucial for attracting and retaining top talent. Our Employee Benefits Services are designed to provide comprehensive solutions that meet the diverse needs of our clients and their employees. With our extensive experience and third-party administrator (TPA) capabilities, we offer a wide range of services to ensure that your employee benefits programs are effective, compliant, and cost-efficient.

1

Benefit Plan Design and Implementation

A core service of WHA is helping clients design and implement employee benefit plans that meet their specific needs. WHA works closely with clients to understand their goals and create tailored benefit programs that include health insurance, dental and vision plans, retirement plans, and more. Our implementation support ensures a smooth transition and effective communication with employees.

2

Third-Party Administrator (TPA) Services

WHA offers TPA capabilities to manage and administer employee benefit plans efficiently. Our TPA services include claims processing, eligibility management, and compliance monitoring, providing clients with a seamless and integrated benefits administration experience.

3

Compliance and Regulatory Support

Ensuring that employee benefit plans comply with all applicable laws and regulations is essential. WHA provides comprehensive compliance support, helping clients navigate the complexities of regulations such as the Affordable Care Act (ACA), ERISA, and HIPAA. We stay current with legislative changes to ensure that your benefit programs remain compliant.

4

Employee Communication and Education

Effective communication and education are key to maximizing the value of employee benefits. WHA conducts workshops, webinars, and personalized sessions to educate employees about their benefits options, enrollment processes, and how to make the most of their plans. Clear and informative communication helps employees appreciate and fully utilize their benefits.

5

Cost Management Strategies

Providing strategies to control and reduce the costs of employee benefit programs is a priority. WHA offers solutions such as plan design optimization, wellness programs, and employee health initiatives that can lower healthcare costs and improve employee well-being. Our cost management strategies ensure that clients get the best value for their benefits investment.

6

Data Analysis and Reporting

Analyzing benefits data to identify trends, areas of concern, and prospects for improvement is a key service. WHA leverages advanced data analytics to provide clients with actionable insights into their benefits programs, helping them make informed decisions and enhance plan performance.

7

Vendor Management

Managing relationships with benefits providers and vendors is an integral part of our service. WHA handles vendor selection, contract negotiations, and performance monitoring to ensure that clients receive high-quality services at competitive prices. Our vendor management expertise ensures a cohesive and efficient benefits program.

8

Wellness and Preventive Programs

As a vital aspect of our service offering, WHA designs and implements wellness initiatives that encourage healthy lifestyles, reduce absenteeism, and increase productivity. These programs include health screenings, fitness challenges, and mental health support.

9

Open Enrollment Support

Assisting clients with the annual open enrollment process is a crucial service. WHA provides comprehensive support, including communication materials, enrollment meetings, and online tools to facilitate a smooth and efficient enrollment experience for employees.

10

Employee Navigator™

Employee Navigator is a benefits administration and HR software that streamlines employee benefits, compliance, and HR processes. It offers tools for benefits enrollment, ACA reporting, onboarding, PTO tracking, and document management and integrates with insurance carriers and payroll systems to enhance efficiency and ensure compliance.

11

MyWave™ – Online Portal

The MyWave Online Portal is a digital platform providing clients 24/7 access to policy documents, claims management, safety training materials, and personalized content. It features user-friendly dashboards and real-time updates and supports online reporting and analytics for effective insurance program management.

In Summary

WHA is committed to helping clients create and manage effective benefits programs that attract and retain talent, enhance employee satisfaction, and ensure compliance with regulatory requirements. Our TPA capabilities further streamline benefits administration, providing a seamless and integrated approach to managing employee benefits.

Risk Management Program

WHA believes in a consultative approach, integrating our knowledge of your risk appetite, tort liability, best practices techniques, and property exposures with cutting-edge strategies to craft a cohesive plan. Risk management involves strategies to minimize the potential negative impacts of risks faced by organizations. There are five fundamental risk management options used to handle risks:

Avoidance

This involves eliminating the risk by not engaging in the activity that generates the risk.

Reduction

This strategy aims to reduce the likelihood and/or impact of a risk.

Transfer

Risk transfer involves shifting the risk to another party, usually through insurance or outsourcing.

Acceptance

Sometimes, the cost of mitigating a risk may be more than the risk itself.

Sharing

This involves sharing the burden of the risk with other parties.

These options provide a framework for organizations to analyze and decide on the most appropriate strategies to handle various risks they face in their operations. We evaluate loss experience against similar providers in Oregon and across the Western U.S., considering Tort law limits. Federal lawsuits pose additional risks, exemplified by wildfire claims, ice storms, discrimination claims, and bodily injury claims. Real property valuations and equipment costs are monitored closely due to inflation and supply chain issues.

We'll continue to assist school districts in selecting and implementing the most suitable risk management framework, as well as in program development and ongoing management.

Available Risk Management Solutions

Available Risk Management (RM) services include, but are not limited to:

- **Inspection Services**
  Property risk assessments, thermal imaging inspections, and UAS (drone) roof and infrastructure inspections.

- **Risk Assessments**
  Crime prevention through environmental design (CPTED), NFPA 1400 series inspections, and playground safety inspections.

- **Training & Consulting**
  Develop RM framework, education workshops and seminars, and access to online training platforms.

- **Comprehensive Safety Services**
  Custom safety signage, mental health and well-being consulting, and contracting and implementation services.

- **RM Software Solutions**
  Advanced mapping and 3D/2D scanning, and GIS and spatial analysis for RM.

*Nathan Cortez, Director of Risk Management, is conducting a playground safety inspection with an impact tester, one of our many state-of-the-art risk management tools.

Physical Inspections

Physical inspections utilizing this equipment include:

Tool	Use
Air Monitor	Air quality monitoring.
Anemometer	Measures wind speed/direction; air velocity/temp/flow.
Camera	Building inspections and equipment/contents inventory.
Dosimeter	Sound level monitoring.
Endoscope	Confined-space inspection (i.e., pipes, panels, etc.).
GFCI Tester	Verification of proper operation and circuit grounding.
Impact Tester	Fall surfacing testing of playground surfaces.
Infra. Monitor	Infrared temperature monitor measures temperature.
Laser Measure	Measures height, length, width, and depth.
Moisture Tester	Moisture testing for mold or water damage.
Thermal Imager	Emissivity measurement 180-deg/360-deg video.
UAS (Drone)	Building inspections and mapping and 2D/3D modeling.
Voltage Meter	Electrical voltage testing.
Voltage Tester	Used to verify the existence of voltage.

Contract Liability Services

Our Contract Liability Services are designed to help clients navigate the complexities of contract law, minimize potential liabilities, and ensure comprehensive protection through tailored insurance solutions.

1

Contractual Risk Analysis

Evaluating contracts to identify potential liabilities and advising on risk mitigation strategies is a critical service we offer. WHA conducts thorough analyses of contractual agreements to pinpoint areas of vulnerability and provide actionable recommendations to mitigate risks, ensuring clients are fully aware of their exposure and how to manage it effectively.

2

Customized Insurance Solutions

One of our core strengths is developing insurance policies that specifically address the risks identified in contracts, such as contractual liability insurance or professional indemnity insurance. WHA works closely with clients to design bespoke insurance solutions that offer targeted protection against contractual liabilities.

3

Negotiation Support

A vital part of our service is assisting clients in negotiating contract terms to minimize liability and ensure fair risk distribution between contracting parties. Our experts provide strategic advice and support during contract negotiations, helping clients achieve favorable terms that reduce their exposure to risk.

4

Claims Management

Guiding clients through the process of filing and managing claims related to contractual disputes or liabilities is a key service at WHA. Our dedicated claims team provides expert assistance throughout the claims process, ensuring that clients receive the support they need to resolve disputes efficiently and effectively.

5

Compliance Consulting

It is crucial to ensure that all contractual agreements and the corresponding insurance policies comply with industry standards and legal requirements. WHA offers comprehensive compliance consulting services to help clients navigate the regulatory landscape and ensure their contracts and insurance policies meet all necessary legal standards

6

Policy Placement and Procurement

A core service is facilitating the purchase of appropriate insurance policies from suitable insurers to cover potential contractual liabilities. WHA leverages its extensive network of insurers to secure the best possible coverage for clients, ensuring that their contractual risks are adequately insured.

7

Education and Training

Providing training sessions on contract law, risk management, and effective contract drafting to minimize exposure is an essential service. WHA offers educational programs to equip clients with the knowledge and skills needed to draft, review, and manage contracts effectively, reducing their exposure to potential liabilities.

8

Renewal and Policy Review

A critical part of our service is regularly reviewing insurance policies and contract terms to update coverage as business needs and legal environments evolve. WHA conducts periodic reviews to ensure that clients' insurance coverage remains relevant and adequate, making necessary adjustments to reflect changes in their risk profiles.

9

Dispute Resolution Support

WHA offers key services in resolving disputes that arise from contract interpretations or the execution of contract terms. Our team provides expert guidance and support to help clients navigate contractual disputes, aiming to achieve amicable resolutions that protect their interests.

10

Risk Transfer Strategies

We offer strategic advice on methods to transfer risk through insurance, indemnification clauses, or other contractual terms. WHA helps clients develop and implement effective risk transfer strategies, ensuring that risks are appropriately managed and transferred to protect their business interests.

In Summary

Through our comprehensive Contract Liability Services, WHA is committed to helping clients manage their contractual risks effectively, providing the expertise and support needed to safeguard their business and ensure peace of mind.

Safety, Health, & Wellness Services

At WHA, we are dedicated to supporting your personnel in achieving their health, wellness, fitness, and safety goals. Our Safety, Health, & Wellness Services provide a comprehensive suite of tools, guidance, and information designed to enhance the overall well-being of your workforce. Here are some of the key tools we utilize to achieve success and the benefits they offer:

InBody 270: Body Composition Analyzer

The InBody 270 delivers precise measurements, including body fat percentage, skeletal muscle mass, and basal metabolic rate (BMR). This accurate data supports personalized fitness and nutrition plans tailored to individual goals. Regular scans help employees track progress, stay motivated, and remain committed to their health and wellness journeys, making the InBody 270 a powerful tool for workplace wellness programs.

LION Intelligent Training System (I.T.S.): Live Fire Extinguisher Training

The LION (I.T.S) delivers realistic, hands-on fire extinguisher training, building employee confidence and competence. Enhancing fire response skills reduces the risk of workplace fire incidents and promotes a safer environment. This training also supports compliance with safety regulations and standards, reinforcing an organization's commitment to employee safety and preparedness in emergencies.

*Winslow Cervantes, WHA's President and Risk Manager, is conducting a training on how to properly use a fire extinguisher during an emergency using our LION (I.T.S) system.

Creative Safety Supply LabelTac: Industrial OSHA and Custom Sign/Label Printers

LabelTac printers from Creative Safety Supply make it easy to create durable, custom labels and signs that improve workplace communication and safety. Clear labeling helps employees quickly identify hazards, follow procedures, and navigate workspaces safely. By using OSHA-compliant designs, businesses can meet regulatory requirements, reduce the risk of accidents, and avoid costly fines. From equipment tags to floor markings, LabelTac enhances visibility and organization across your facility. With the ability to create labels on demand, you gain control over your safety messaging—ensuring it's always accurate, up-to-date, and effective.

American Red Cross CPR, AED, & BLS Training Kit

Equip your team with essential life-saving skills through hands-on CPR, AED, and Basic Life Support training. This program builds confidence by allowing employees to practice with real manikins and AED devices, ensuring they can respond quickly and effectively in emergencies. The training often results in certification, adding value to their professional credentials while promoting a safer workplace. Whether responding to cardiac arrest or other medical emergencies, trained staff can make all the difference. Investing in this kit demonstrates your commitment to safety, preparedness, and employee development—all in one comprehensive program.

*Dave Pickhardt (far right), one of WHA's Risk Managers, conducting a CPR training using WHA's CPR, AED, & BLS Training Kit.

Blood Pressure Monitor: Supporting Employee Health and Wellness

A blood pressure monitor provides vital insights into cardiovascular health, allowing employees to track their readings regularly and detect early signs of potential health issues. Consistent monitoring supports preventive care by helping to identify and manage conditions like hypertension before they become serious. By making blood pressure monitors accessible in the workplace, employers promote a culture of wellness and encourage proactive health management. This simple yet effective tool empowers employees to take charge of their well-being, contributing to a healthier, more engaged workforce and reducing long-term health risks through early awareness and intervention.

Pulse Oximeter: A Simple Tool for Health Monitoring

A pulse oximeter offers quick, reliable readings of pulse rate and blood oxygen saturation, making it an essential tool for monitoring employee health. Regular use can aid in the early detection of potential health concerns, allowing for prompt intervention and support. Its compact, portable design makes it convenient for use in various workplace settings—from offices to field operations. Easy to operate and noninvasive, the pulse oximeter empowers employees to take an active role in their well-being while helping employers maintain a healthier, more responsive work environment.

In Summary

By integrating these advanced tools and training resources, WHA is committed to fostering a safer, healthier, and more productive workplace. Our Safety, Health, & Wellness Services are designed to empower employees with the knowledge and skills they need to achieve their wellness goals and contribute to a positive organizational culture.

Risk Management Philosophy

WHA has honed a proprietary Enterprise Risk Management (ERM) system that integrates with your strategic plan and offers a proactive stance on emerging risks. This system is the product of WHA's 40-year commitment to public entities and is enriched by Jeff Griffin's recognized expertise.

The system draws from advanced risk management practices in aviation, emergency medicine, and the military, incorporating tools like Just Culture, High-Reliability Organization, and Safety Management Systems. These tools are tailored to enhance and simplify your risk management processes.

Despite the challenges organizations face in implementing ERM, such as vision clarity, process complexity, and fear of negative impacts on productivity and autonomy, WHA's approach is designed to overcome these hurdles. The method fosters a collaborative culture across all departments, enhancing leadership's understanding of risk and empowering them to make informed decisions about risk appetite and tolerance.

Training & Culture Transformation

WHA's commitment extends to training your team in ERM principles. This training is part of a broader strategy to transform leadership and employee culture, ensuring that reporting concerns is seen as a constructive, non-punitive action.

Outcome & Benefits

WHA's refined ERM system enhances decision-making, reduces losses, improves collaboration, and lowers insurance costs. Aligned with ISO 31000, it's tailored for complex organizations and offers lasting risk management solutions.

Controlling Premiums: A 7-Step Analysis

To assess your insurance programs' cost-effectiveness, we utilize a seven-step analysis for each line of insurance:

1. **Risk Management Programs**
   Implementing comprehensive risk management strategies, such as safety training, disaster preparedness, regular risk assessments, and more, can reduce the likelihood and impact of insurance claims.

2. **Increase Deductibles**
   Opting for higher deductibles can significantly lower premium costs. This shifts more initial financial risk to the business but reduces the periodic payment amounts.

3. **Claims History Review**
   Regularly reviewing and managing the claims history can help identify patterns or frequent issues that can be addressed to prevent future claims, thereby potentially lowering premiums.

4. **Loss Prevention Measures**
   Security assessments, employee training, and safety equipment can mitigate risks, leading to fewer claims and potentially lower premiums.

5. **Marketing**
   Comparing quotes from several insurers can help find the most competitive rates and coverages suited to the specific needs of school districts.

6. **Review Coverage Annually**
   Reviewing policies annually ensures that coverage is not only adequate but also cost-effective, avoiding over-insurance or under-insurance.

7. **Utilize Data and Analytics**
   Leveraging data analytics to understand risk profiles better can help negotiate better terms with insurers based on factual risk assessments.

Service Plan

At WHA, we proudly offer the following services as part of our comprehensive and systematic approach to meeting all of your insurance and risk management needs.

Insurance Administration Services

Your dedicated service team at WHA will consistently assess your risks and gather data throughout the policy period for review. Through initial and ongoing evaluations, we'll arrange, develop, and market your insurance coverage needs. We'll present a package of policy terms, conditions, and premiums aligning with your school district's goals. You'll receive a detailed schedule of policies, coverages, deductibles, and premiums. We'll ensure timely premium invoicing to prevent policy lapses and provide updates on industry developments affecting your coverage.

Systematic Approach to Renewals

Our systematic approach includes:

180 Days

- Conduct a market survey
- Update carrier records
- Develop a budget projection.

150 Days

- Create bid specifications and review them with you.

120 Days

- Forward bid specifications to carriers and request quotes.

30 Days

- Prepare a review of coverage and rates for decision-makers
- Finalize renewal instructions
- Produce documentation.

Claims Support: Data Analysis

Your WHA Insurance team will provide open claims review annually and as needed to identify trends and create a service plan to mitigate and address losses and near misses. We'll analyze coverage forms, exclusions, claims handling, rates, and financial strength against bid specifications, adjusting plan design as needed.

Throughout the year, you'll receive monthly summaries of loss history and retrospective premiums. We also train key personnel to ensure they understand the program's financial impact on safety and performance.

Each year, WHA sends you a spreadsheet of all assets, including locations, structure values, contents values, PIO values, and expected trended values. As part of our service plan, we meet with you 120 days before renewal to thoroughly review all assets and discuss how, if any, changes should be made to the schedule.

Reporting

The following reports are provided to school districts:

- ☑ Monthly loss run report for all property & casualty as requested.
- ☑ Monthly Policy Performance Dashboard for workers' compensation.
- ☑ Quarterly review and recommendation of Nondisabling Claims Reimbursement Statement.
- ☑ Each year, in the first quarter, WHA provides a Budget Letter that considers market trends, values, risks, and claims from both the Oregon Public Entities and at the national level to provide you with an accurate budget projection.

Highest Standard

Our commitment is to prioritize and provide excellence in risk management to school districts. Our approach includes:

- Comprehensive Coverage: Tailored solutions for all risks.
- Mitigation Strategies: Proactive risk reduction.
- Transparency: Clear communication.
- Responsive Claims: Swift and empathetic handling.
- Continuous Improvement: Evolving to meet needs.
- ISO31000: We use guidelines such as ISO31000, which guide effective risk management practices and emphasize continuous improvement.

The Cornerstone of Service

WHA prioritizes claims support as a cornerstone service, aiming for industry leadership. Upon claim notification, we collaborate with you to classify each claim as Urgent, Manage, Support, Third-Party, or Claims Analytics:

Urgent

Claims are significant to your operations, receive 24/7 support tailored to your needs, including legal and media assistance, resource coordination, and grief counseling.

Managed

Claims involve hands-on management, especially for complex or unclear liability cases. We assign specific expectations and manage timeframes.

Support

Claims require monitoring to ensure timely and satisfactory outcomes, activating appropriate coverages.

Third-Party

Claims involve overseeing insurers and lines of insurance, aiding in subrogation or settlements.

Claims Analytics

Offers data analysis for future prevention and insurance planning, including annual reports on losses and regional trends.

National Incident Management

We collaborate with public entities and FEMA to manage events seamlessly with local governments. Using the NIMS system, we respond to major incidents involving fatalities, multiple hospitalizations, or significant losses. Recently, we cut a client's hydro-turbine downtime from 90 days to 7. During an out-of-state wildfire, we swiftly reported a public employee's injury to State and Fed OSHA. Our commitment goes beyond emergencies, ensuring full support through recovery.

1

Legal & Federal Notifications

We assist you in handling all state and federal legal notifications, including those from OSHA, the State Fire Marshal, and other relevant agencies. Additionally, we manage contractual notifications related to insurance and workers' compensation.

2

Operational Support

Our services include keeping your operations functional. This involves collaborating with other public entities and insurance providers to find necessary support resources, which may include equipment, infrastructure (such as portable offices), and trained staff.

3

Public Information Office Assistance

We work closely with your Public Information Office to create and manage information and media notifications. Effective communication during critical events is essential for public safety.

4

Support for Families

In the unfortunate event of a loss of life or property, we assist you in supporting affected families. Our compassionate approach helps navigate the emotional challenges during such difficult times.

5

Post-Traumatic Impact Support

Our team is dedicated to helping your staff cope with the aftermath of traumatic events. Whether it's an emergency or a complicated return home after an

Online Services

At WHA, we use cutting-edge technology to support your risk management and insurance needs. Our Online Services grant full access to ZYWAVE and Succeed Management Solutions, providing expert tools for risk management, compliance, and safety.

ZYWAVE

- Compliance Support: Stay up to date with ACA, ERISA, and regulatory mandates to avoid penalties.
- Risk Management & Safety: Access training, risk assessments, and incident tracking to mitigate risks.
- Communication Tools: Share newsletters, policy updates, and safety alerts efficiently.
- Insurance Guidance: Get expert insights on coverage options and best practices.
- Workers' Comp & Mod Analysis: Track claims, analyze EMR, and control costs effectively.
- User-Friendly Interface: Easily navigate resources for quick access.

SUCCEED
Management Solutions, LLC

- Proactive Risk Management: Create and manage risk mitigation programs to prevent claims and losses.
- Workplace Safety: Access training, checklists, and compliance tracking to reduce accidents.
- Cost-Effective: Streamline risk management to cut administrative costs and lower claims.
- Easy Access: Use the platform anytime, anywhere, from any device.
- Customizable Solutions: Tailor tools to fit your organization's unique risk needs.
- Data-Driven Insights: Track trends and make informed decisions with powerful analytics.

PACE Property and Casualty Coverage for Education

Proposal Summary

Invoice Number: 40P60121-216 **Entity ID:** 60121 **Effective Date:** 7/1/2025 **Expiration Date:** 6/30/2026 **Proposal Date:** 06/06/2025

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Coverage		Contribution
Educators Liability	PACE Trust Retention	$14,758
	Less Employment Practices Liability Toolkit Credit	$851
	Adjusted Contribution	$13,907
Sexual Misconduct Liability		$5,885
Liability of the Reinsurer		$10,928
Auto Liability		$14,112
Includes: Excess Auto Liability Coverage Auto Supplemental Liability Coverage		
Non-Owned and Hired Auto Liability		$237
Auto Physical Damage		$20,581
Hired Auto Physical Damage		$86
Property		$29,907
Earthquake		Included
Flood		Included
Equipment Breakdown/ Boiler and Machinery		$715
Crime		$3,070
Cyber Liability		Included
	Total	$99,428

PACE
P.O. Box 12613
Salem, OR 97309
Phone: 800-285-5461 Fax: 503-371-4781

Liability

PACE Property and Casualty Coverage for Education

Educators Liability Coverage Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Limits of Liability:	Educators Liability Coverage	Limit	Deductible*
	Per Occurence Limit of Liability	$10,000,000	None
	Per Wrongful Act Limit of Liability	$10,000,000	None
	Annual Aggregate Limit of Liability**	$20,000,000	None
Educators Liability Contribution:			**Contribution**
	PACE Trust Retention	$2,000,000	$13,907
	Liability of the Reinsurer	$8,000,000	$10,928
	Totals:	$10,000,000	$24,835

Additional and Supplemental Coverages: Unless indicated in the Additional Coverages Section (III) of the PACE Educators Liability Coverage Document, the following Additional Coverages are not added to the above identified Total Limit of Liability.

Coverage	Per OccurenceLimit	Total Limit of Liability	Deductible	Contribution
Ethics Complaint Defense Costs	$25,000	$25,000	None	Included
Premises Medical Expense	$5,000	$5,000	None	Included
Limited Hazardous Substances Coverage	$250,000	$250,000***	None	Included
Applicators Pollution Coverage	$50,000	$50,000	None	Included
Injunctive Relief Defense Costs	$25,000	$25,000***	None	Included
Fungal Pathogens (Mold) Defense Costs	$100,000	$100,000	None	Included
OTSPC Defense Costs	$25,000	$25,000	None	Included
Lead Sublimit Defense Costs	$50,000	$50,000***	None	Included

Total Contribution: $24,835

Forms applicable to Named Participant: PACE Educators Liability Coverage Document - 07/01/2025

This proposal only represents a brief summary of Liability Coverage. Please refer to the PACE Educators Liability Coverage Document for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____
Authorized Representative/Agent Requested Effective

* $25,000 minimum deductible for terminations if PACE or approved legal counsel is not consulted prior to an employment termination.

** Aggregate Limit of Liability is the maximum limit provided by the combination of coverage from the Trust and any Excess Carrier(s) listed on the PACE Excess Liability Coverage Certificate.

*** Coverage subject to an Annual Aggregate Limit for all Trust members. See the PACE Educators Liability Coverage Document for specific terms and conditions.

PACE Property and Casualty Coverage for Education

Sexual Misconduct Liability Coverage Endorsement Proposal

Certificate Number: 40P60121-216 **Coverage Period**: 7/1/2025 through 6/30/2026

Named Participant	Second Named Participant	Agent of Record
Alsea School District 7J	Alsea Charter School	WHA Insurance
PO Box B		2930 Chad Dr
Alsea, OR 97324		Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

PLEASE CAREFULLY REVIEW THE PROPOSED ENDORSEMENT AS IT MODIFIES/ AMENDS THE LIABILITY COVERAGE DOCUMENT

This Endorsement modifies the **Liability Coverage Document** issued under the Certificate Number indicated above, to the **Named Participant** identified above, for the **Coverage Period** indicated.

SCHEDULE

Additional Coverage 12-Liability for Bodily Injury or Personal Injury because of Sexual Misconduct-Limits of Liability (Eroding Limits):

Each **Incident** Limit:	$10,000,000
Sexual Misconduct Aggregate Limit:	$10,000,000
Sexual Misconduct Each **Incident Deductible**:	$10,000
Contribution:	$5,885

Except as expressly stated in this Endorsement, the **Liability Coverage Document** to which this Endorsement is attached does not apply to or provide coverage for any **incident**, **occurrence**, **wrongful act**, **claim**, **suit**, **damages**, **defense costs**, or any liability or obligation of any kind, caused by, resulting from, or arising out of any actual or alleged **sexual misconduct**, including attempted or threatened **sexual misconduct**.

As consideration for the additional contribution made by or on behalf of the **Named Participant**, as indicated in the **Schedule** of this **Sexual Misconduct Liability Coverage Endorsement**, the following is added to III. Additional Coverages of the **Liability Coverage Document**:

Additional Coverage 12: Liability for Bodily Injury or Personal Injury Because of Sexual Misconduct

1. Subject to the terms, conditions, limitations, exceptions, and exclusions set forth in this **Liability Coverage Document**, the Trust will pay those sums that a covered **Participant** becomes legally obligated to pay as **damages** for **bodily injury** or **personal injury** because of **Sexual Misconduct** to which this **Additional Coverage 12** applies. The total amount that we will pay in indemnification of **damages**, judgements, or settlements under this **Additional Coverage 12** is limited as shown in the **Schedule** of the **Sexual Misconduct Liability Coverage Endorsement**.

    a. We have the right and duty to defend a covered **Participant** against any **suit** seeking **damages** for **bodily injury** or **personal injury** to which this **Additional Coverage 12** applies.

        (1) We will defend a covered **Participant** against any **suit** seeking **damages** for **bodily injury** or **personal injury** to which this **Additional Coverage 12** applies, even if any or all of the allegations against the covered **Participant** are groundless, false, or fraudulent.

(2) **Defense costs** are in addition to the Limits of Liability set forth in the **Schedule** of the **Sexual Misconduct Liability Coverage Endorsement**, and payment of **Defense costs** by the Trust will not reduce or exhaust these Limits of Liability.

(3) Our right and duty to defend a covered **Participant** ends when:

(a) a **suit** no longer seeks recovery of **damages** from a covered **Participant**; or

(b) we have exhausted the limit of coverage available under **Coverage Agreement D**, as shown in the **Schedule** of the **Sexual Misconduct Liability Coverage Endorsement**, in payment of judgments or settlements.

b. We may, at our discretion, investigate any **incident** resulting in **bodily injury** or **personal injury** to which this **Additional Coverage 12** may apply, and settle any **claim** or **suit** arising out of that **incident.**

c. We have no duty to defend or indemnify any **Participant** against any **claim** or **suit** seeking **damages** for **bodily injury** or **personal injury** to which this **Additional Coverage 12** does not apply.

2. **Additional Coverage 12** applies to **bodily injury** and **personal injury** because of **sexual misconduct** *only if:*

a. The **Named Participant** is in full compliance with all Oregon statutes, administrative rules, and regulations governing the investigation and reporting of abuse and sexual conduct, including, if applicable to the **Named Participant**, the background check, reporting policies, and training requirements set forth in ORS 339.370, ORS 339.372, ORS 339.388, and ORS 339.400;

b. The **bodily injury** or **personal injury** is caused by an **incident** that takes place within the **Coverage Territory**;

c. The **bodily injury** or **personal injury** is caused by an **incident** that first occurs or is initiated during the **Coverage Period**; and

d. Prior to the **Coverage Period**, no **Particpant** knew that the **bodily injury**, **personal injury**, or **incident** was occurring or had occurred, whether in whole or in part.

(1) If any **Participant** knew, prior to the **Coverage Period**, that the **bodily injury**, **personal injury**, or **incident** was occurring or had occurred, whether in whole or in part, then any continuation, change or resumption of such **bodily injury**, **personal injury**, or **incident** will be deemed to have been known prior to the **Coverage Period**.

(2) **A Participant** will be deemed to have known that **bodily injury**, **personal injury**, or **incident** was occurring or had occurred, whether in whole or in part, at the earliest date upon which any **Participant**:

(a) observes, causes, or is directly involved in the **incident** resulting in **bodily injury** or **personal injury**;

(b) becomes aware by any means that **bodily injury**, **personal injury**, or the **incident** is occurring or has occurred, whether in whole or in part;

(c) receives a written or verbal **claim** alleging that **bodily injury**, **personal injury**, or the **incident** is occurring or has occurred, whether in whole or in part; or

(d) reports all, or any part, of the **bodily injury**, **personal injury**, or **incident** resulting in the **bodily injury** or **personal injury**, to us, any insurance agent or broker, or any insurance company.

3. **Exclusions**

Additional Coverage 12 does not apply to or provide any coverage for:

a. **Direct Participation**

Any **Participant** or other person who actually or allegedly committed, attempted to commit, threatened to commit, directed, encouraged, knowingly facilitated, or otherwise directly participated in the **incident**.

b. **Criminal Acts or Conduct**

Any actual, alleged, or attempted criminal, fraudulent, or malicious act or omission committed by, at the direction of, or with the knowledge and consent of the **Participant**, regardless of whether or not the **Participant** is charged with, prosecuted, or convicted of the crime alleged.

For purposes of this exclusion, and in the application of this exclusion, any actual or alleged criminal, fraudulent, or malicious act or omission committed by, at the direction of, or with the knowledge and consent of one **Participant** will only be imputed to another **Participant** if that **Participant** directly and knowingly participated in the **incident**.

c. **Expected Or Intended Injury**

Any actual or alleged intentional act of a **Participant** carried out with the intent to cause **bodily injury** or **personal injury** if the act results in the intended **bodily injury** or **personal injury** that was reasonably certain to result from the intentional act.

This exclusion does not apply to **bodily injury** that occurs as a direct result of a **Participant's** use of **authorized self-defense** to protect the **Participant** or other persons from imminent physical harm.

d. **Failure Comply With Policies, Procedures, Rules, Or Statutory Mandates Or Requirements**

Any **claim**, **suit**, **damages**, **defense costs**, or any liability or obligation of any kind, caused by, resulting from, or arising out of any actual or alleged:

(1) failure of the **Named Participant** to:

(a) adopt, implement, and enforce policies related to the investigation and reporting of abuse or sexual conduct as required by statute, administrative rule, regulation, ordinance, or other law;

(b) conduct a background check as required by statute, administrative rule, regulation, ordinance, or other law;

(c) adopt, implement, and enforce reporting and investigation requirements required by statute, administrative rule, regulation, ordinance, or other law; or

(d) provide training and information to its **employees**, agents, contractors, and volunteers, on the subjects of abuse or sexual conduct as required by statute, administrative rule, regulation, ordinance, or other law;

(2) failure of any trustee, board member, director, officer, superintendent, official, or administrator of the **Named Participant** to follow any written policy, procedure, protocol, rule, or regulation addressing the investigation, prevention, or reporting of **sexual misconduct**;

(3) failure of any other person to whom the **Named Participant** has delegated responsibility for the investigation, prevention, or reporting of **sexual misconduct** to follow any written policy, procedure, protocol, rule, or regulation addressing the investigation, prevention, or reporting of **sexual misconduct**; or

(4) failure of any person identified in **(2)** or **(3)** above to report **sexual misconduct** when under a legal duty or obligation to do so.

e. **Incidents Occurring Or Initiated Prior To Coverage Period**

Any **claim**, **suit**, **damages**, **defense costs**, or any liability or obligation of any kind, caused by, resulting from, or arising out of any actual or alleged **incident** that commenced or occurred prior to the **Coverage Period** regardless of whether or not the **incident** continues, resumes, reoccurs, or involves changes in degree or type of **sexual misconduct**, during the **coverage period.**

f. **Protected Class Discrimination**

Any **claim**, **suit**, **damages**, **defense costs**, or any liability or obligation of any kind, for **bodily injury** or **personal injury** caused by, resulting from, or arising out of any actual or alleged act, pattern, or practice of discrimination based on a person's race, color, national origin, religion, disability, sex (including pregnancy), sexual orientation, gender or gender identity, age, or marital status.

g. **Contractual Liability**

Any actual or alleged breach of any **contract**. This exclusion applies regardless of whether or not the **contract** was made orally or in writing, or is legally binding or enforceable.

h. **Assumed Liability**

Any assumption of liability or any other obligation to pay **damages** or indemnify, hold harmless, or reimburse any other person or entity, under the terms of any **contract**.

i. **Workers Compensation**

Any liability or obligation of any **Participant** under any workers' compensation, disability benefits, or unemployment compensation law or similar law.

j. **Employer's Liability**

Any **claim** or **suit** made by or on behalf of:

(1) any **employee** of the **Named Participant** alleging **bodily injury**, **personal injury**, or any liability for **damages** arising out of or in the course of employment by the **Named Participant**; or

(2) any person as a consequence of **(1)** above.

This exclusion applies:

(1) whether the **Named Participant** may be liable as an employer or in any other capacity; and

(2) to any obligation to share **damages** with or repay anyone else who must pay **damages** because of **bodily injury**, **personal injury**, or any other injury.

k. **Employment-Related Practices**

Any **claim** or **suit** made by or on behalf of any person alleging **bodily injury**, **personal injury**, or any liability for **damages** arising out of any:

(1) refusal to hire or employ that person;

(2) termination of that person's employment; or

(3) employment-related practice, policy, act, or omission, including coercion, demotion or failure to promote, evaluation or failure to evaluate, reassignment, discipline or failure to discipline, defamation, libel, slander, retaliation, invasion of privacy, harassment, hazing, hostile work environment, humiliation, or discrimination.

This exclusion applies:

(1) whether the **Named Participant** may be liable as an employer or in any other capacity; and

(2) to any obligation to share **damages** with or repay anyone else who must pay **damages** because of **bodily injury**, **personal injury**, or any other injury.

l. **Punitive Or Exemplary Damages**

Any sum awarded for punitive, exemplary, or multiplied **damages**, taxes, or interest, arising out of or in relation to any **incident**.

m. **Fines Or Penalties**

Any civil, criminal, or administrative fine or penalty arising out of or levied in relation to any **incident**.

n. **Property Damage**

Any actual or alleged liability for **damages** because of **property damage**.

o. **Liability For Damages Covered Elsewhere In This Liability Coverage Document**

Any **claim**, **suit**, **damages**, defense costs, or any liability or obligation of any kind for which coverage is provided under any other Coverage Part or Coverage Agreement set forth in this **Liability Coverage Document**.

4. **Limits Of Liability**

a. The Limits of Liability shown in the **Schedule** of the **Sexual Misconduct Liability Coverage Endorsement** and the rules below is the most that the Trust will pay under **Additional Coverage 12** regardless of the number of:

(1) **Participants**;

(2) **claims** made or **suits** initiated; or

(3) persons or organizations making **claims** or initiating **suits**.

b. The Sexual Misconduct Aggregate Limit is the most the Trust will pay for all **claims**, **suits**, **damages**, and all liability and obligations of any kind, caused by, resulting from, or arising out of any actual or alleged **sexual misconduct** to which **Additional Coverage 12** applies.

c. Notwithstanding a and b above, and subject to the Each **Incident** Limit and Sexual Misconduct Aggregate Limit, if any **incident** is subject to the Oregon Tort Claims Act (OTCA), then the most the Trust will pay for all **claims**, **suits**, or **damages** arising from such **incident** under **Additional Coverage 12** are the Limitations on Awards set forth in the OTCA (ORS 30.269 through ORS 30.273). For purposes of the coverage afforded under this Endorsement, all **claims**, **suits**, or **damages** arising from a single incident shall be deemed to "[a]rise out of a single accident or occurrence," as such phrase is used in ORS 30.272.

d. Subject to the Sexual Misconduct Aggregate Limit, the Each **Incident** Limit is the most the Trust will pay for all sums incurred, paid in settlement, and awarded as **damages** in relation to any one **incident**.

e. The Sexual Misconduct Aggregate Limit and the Each **Incident** Limit are eroding limits, which means that the amount that the Trust will pay under **Additional Coverage 12** is reduced, and may be exhausted, by all payments and **damages** made by the Trust pursuant to **Additional Coverage 12**.

5. **Deductible**

a. The **Deductible** shown in the **Schedule** of the **Sexual Misconduct Liability Coverage Endorsement** is to be applied to each **Incident**, regardless of the number **incidents** that take place during the **Coverage Period**. If the **Trust** requests reimbursement of the **Deductible** after paying the full amount of a **Claim**, settlement, or judgement, the **Named Participant** shall reimburse the **Trust** for any **Deductible** within thirty (30) calendar days.

b. The **Deductible** will apply only to the actual **Damages** paid to a claimant. Actual **Damages** will include all settlement amounts paid to a claimant.

c. Payment of **Defense Costs** incurred will not be included within the **Deductible**.

ALL OTHER TERMS AND CONDITIONS OF THE LIABILITY COVERAGE DOCUMENT REMAIN UNCHANGED

This proposed Endorsement ammends Section **III. Additional Coverages** of the **Liability Coverage Document** only, and does not modify, ammend, waive or otherwise affect any of the other terms, conditions, limitations, exceptions, or exclusions of the **Liability Coverage Document**.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Excess Liability Coverage Proposal

Coverage Period: 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposed coverage is only provided in excess of the listed Retention and only up to the listed Coverage Limits.

Excess Carrier	Policy	Retention	Coverage Limits		
			Per Occurrence	Member Aggregate	Trust Aggregate *
Allied World Assurance Co.	TBD	$10,000,000	$5,000,000	$5,000,000	N/A
Group Ark Insurance Ltd./Arcadian Risk Capitol Ltd.	TBD	$15,000,000	$5,000,000	$5,000,000	$15,000,000

* This is an annual aggregate limit and is the maximum amount the indicated carrier(s) will pay for the total (sum) of all claims incurred by all Trust Members (individually and as a group) during the coverage period. Please see the Excess Coverage Agreement for specific terms and conditions.

Contribution: Included

PACE does not provide the coverage described in this document. PACE procured excess liability coverage from the above referenced Excess Carrier(s), with the above referenced Limit(s), but only in excess of the above referenced Retention(s). PACE permits members of OSBA, who purchase Educators Liability Coverage from PACE, access to the above referenced coverage.

This document provides a brief summary of the Excess Liability coverage provided by the above listed Excess Carrier(s) and in-no-way replaces or supersedes the coverage documents from any or all of the listed Excess Carrier(s). Please refer to the listed Excess Carriers' coverage documents (policies) and any associated documents for details regarding coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent

Requested Effective

PACE Property and Casualty Coverage for Education

School Violent Acts Coverage Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Under the proposed coverage, PACE will pay your Crisis Expenses in excess of the retained limit because of a Violent Act at your premises which takes place during the Coverage Period and to which this coverage applies.

Limit of Coverage (Per Occurrence and Annual Aggregate): $50,000
Maximum Annual Aggregate Limit All PACE Members Combined: $200,000
Deductible (Retained Limit): $0
Contribution: Included

Applicable Coverage Document:
PACE School Violent Acts Coverage Document - 07/01/2025

This proposal only represents a brief summary of Violent Acts Coverage. Please refer to the PACE School Violent Acts Coverage Document for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____
Authorized Representative/Agent Requested Effective

Auto

PACE Property and Casualty Coverage for Education

Auto Liability and Auto Physical Damage Coverage Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Auto Liability

Coverage	Per-Occurrence Limit	Deductible	Contribution
Auto Liability	$500,000	None	$14,112
Non-Owned/ Hired Auto Liability	$500,000	None	$237

Applicable Coverage Document:
PACE Auto Liability Coverage Document - 07/01/2025

Auto Physical Damage

Coverage	Per-Occurrence Limit	Deductible	Contribution
Auto Physical Damage	Per Schedule	Per Schedule	$20,581
Hired Auto Physical Damage	$50,000	$100/$500	$86

Applicable Coverage Document:
PACE Auto Physical Damage Coverage Document - 07/01/2025

This proposal only represents a brief summary of Auto Liability Coverage and Auto Physical Damage Coverage. Please refer to the PACE Auto Liability Coverage Document and the PACE Auto Physical Damage Coverage Document for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____
Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Excess Auto Liability Coverage Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Excess Auto Liability

Coverage	Excess Liability Limit (Per Accident)	Retention	Contribution
Excess Auto Liability Coverage	$14,500,000	$500,000	Included with Auto Liability Contribution
Excess Non-Owned/ Hired Auto Liability	$14,500,000	$500,000	Included with Non-Owned/Hired AL Contribution

Applicable Coverage Document:
PACE Excess Auto Liability Coverage Document - 07/01/2025

This proposal only represents a brief summary of Excess Auto Liability Coverage. Please refer to the PACE Excess Auto Liability Coverage Document for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____
Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Auto Supplemental Coverage Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Auto Supplemental

Coverage	Limit of Liability	Deductible	Contribution
Personal Injury Protection	See Coverage Document	None	Included with Auto Liability
Uninsured/ Underinsured Motorist Bodily Injury	$500,000 Per Accident	None	Included with Auto Liability

Applicable Coverage Document:
PACE Auto Supplemental Coverage Document - 07/01/2025

This proposal only represents a brief summary of Auto Supplemental Coverage. Please refer to the PACE Auto Supplemental Coverage Document for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____
Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Alsea School District 7J

Policy Year: 07/01/25 to 06/30/26

Agent: WHA Insurance

Automobile Schedule

Auto Liability Per Occurence Deductible: $0.00

Auto Code	Year	Make	Description	Vehicle Identification #	Collision	Comp	Deductible Collision | Comp		Value	AL Contribution	APD Contribution
17	2000	Blue Bird	WLA	1BABKBXA3YF090986	Yes	Yes	$500	$500	$6,800.00	$859.05	$92.10
	Weight Class:	Hvy Truck	**Valuation:**	Functional	**Term:**	07/01/2025 to 06/30/2026					
Van 1	2013	Dodge	Caravan - ASD	2C4RDGBG1DR628174	Yes	Yes	$500	$500	$9,800.00	$747.00	$132.74
	Weight Class:	Priv. Pass	**Valuation:**	Functional	**Term:**	07/01/2025 to 06/30/2026					
PU 1	2015	Dodge	Ram 2500 - ASD	3C6TR5H25FG695061	Yes	Yes	$500	$500	$32,852.00	$616.28	$444.96
	Weight Class:	Lgt Truck	**Valuation:**	Functional	**Term:**	07/01/2025 to 06/30/2026					
1	2016	Blue Bird	Vision BBCV3310 - WLA	1BAKGCPA0GF320179	Yes	Yes	$500	$500	$50,000.00	$859.05	$752.46
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
2	2016	Blue Bird	Vision BBCV3310 - WLA	1BAKGCPA7GF320180	Yes	Yes	$500	$500	$48,000.00	$859.05	$722.36
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
3	2016	Blue Bird	Vision BBCV3310 - WLA	1BAKGCPAXGF324319	Yes	Yes	$500	$500	$50,000.00	$859.05	$752.46
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
Van 2	2016	Dodge	Grand Caravan - ASD	2C4RDGCG6GR250212	Yes	Yes	$500	$500	$14,925.00	$747.00	$202.15
	Weight Class:	Priv. Pass	**Valuation:**	Functional	**Term:**	07/01/2025 to 06/30/2026					

Auto Code	Year	Make	Description	Vehicle Identification #	Collision	Comp	Deductible Collision | Comp		Value	AL Contribution	APD Contribution
4	2019	Blue Bird	Blue Bird Vision - ASD	1BAKGCSA3KF350700	Yes	Yes	$500	$500	$67,000.00	$859.05	$1,008.30
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
Van 3	2019	Dodge	Caravan - ASD	2C4RDGBG4KR590680	Yes	Yes	$500	$500	$10,000.00	$747.00	$150.49
	Weight Class:	Priv. Pass	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
5	2020	Blue Bird	BBCV2311 Vision - ASD	1BAKBCSA0LF361931	Yes	Yes	$500	$500	$81,000.00	$784.35	$1,218.99
	Weight Class:	Med Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
58	2021	Blue Bird	Bus - ASD	1BAKGCSA4MF373441	Yes	Yes	$500	$500	$116,000.00	$859.05	$1,745.71
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
T	2021	Miscellaneous	Dump Low Profile - ASD	4YMBD142XMR008782	Yes	Yes	$500	$500	$17,179.00	$163.41	$258.53
	Weight Class:	Med Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
7	2023	Blue Bird	77 Passenger - ASD	1BAKGCSA0PF391471	Yes	Yes	$500	$500	$119,629.00	$859.05	$1,800.32
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
18	2023	Blue Bird	All American - WLA	1BABNBSA6PF391443	Yes	Yes	$500	$500	$147,607.00	$859.05	$2,221.37
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
9	2023	Ford	14 Passenger Micro Bird T	1FDDR7PG0PKB82571	Yes	Yes	$500	$500	$117,710.00	$859.05	$1,771.45
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
8	2024	Blue Bird	Model BBCV3310 - ASD	1BAKGCSA1SF806760	Yes	Yes	$500	$500	$160,747.00	$859.05	$2,419.11
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					
20	2025	Blue Bird	77 Passenger - WLA	1BAKGCSAXSF807289	Yes	Yes	$500	$500	$162,469.00	$859.05	$2,445.02
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					

Auto Code	Year	Make	Description	Vehicle Identification #	Collision	Comp	Deductible Collision | Comp		Value	AL Contribution	APD Contribution
21	2025	Blue Bird	77 Passenger - WLA	1BAKGCSA6SF807290	Yes	Yes	$500	$500	$162,469.00	$859.05	$2,445.02
	Weight Class:	Hvy Truck	**Valuation:**	Replacement	**Term:**	07/01/2025 to 06/30/2026					

Total:	$1,374,187.00	$14,113.64	$20,583.54

Weight Class

Priv. Pass = (0 - 10,000 LBS)
Lgt Truck = (0 - 10,000 LBS)
Med Truck = (10,001 - 20,000 LBS)
Hvy Truck = (20,001 - 45,000 LBS)
XHvy Truck = (OVER 45,000 LBS)

Valuation Codes

Replacement = Replacement Cost Valuation
Functional = Functional Replacement Cost

Property

PACE Property and Casualty Coverage for Education

Property Coverage Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Scheduled Property Values

$10,775,457	Buildings, Other Structures and Scheduled Outdoor Property
$1,775,809	Personal Property
$47,109	Mobile Equipment

Total Limit of Indemnification (Per Occurrence)

$12,598,374	The Trust shall not pay, or be liable for more than the Total Limit of Indemnification in any single "occurrence" during the Property Coverage Period, including all related costs and expenses, allcosts of investigation, adjustment and payment of claims, but excluding the salaries of your regular employees and counsel on retainer.
$550,000,000	PACE Per Occurance Aggregate Loss Limit

Sublimits (Per Occurrence)

The subjects of coverage listed below are sub-limited within the "occurrence" Total Limit of Indemnification shown above. The Limits reflect the maximum amount the Trust will pay for losses involving these coverages. The titles below are provided merely for convenience of reference and shall not be deemed in any way to limit or affect the provisions to which they relate.

Covered Property

Section VIII - Covered Property in the PACE Property Coverage Document

$100,000	Personal Property Away From Scheduled Premises
$500,000	Personal Property of Others within your Care, Custody, or Control, other than Mobile Equipment
$250,000	Property of Students/Employees/Volunteers (subject to a $5,000 maximum per person)
$50,000	Mobile Equipment of others that is within your Care, Custody or Control
$10,000	Unscheduled Fine Arts (Fine Art may be specifically scheduled for higher limits)

Additional Coverages

Section X - Additional Coverages in the PACE Property Coverage Document

$5,000,000	Debris Removal *Sublimit is $5,000,000 or 25%, whichever is less.*
$100,000	Pollutant Clean-up and Removal from Land or Water *Sublimit is $100,000 or 20% of the scheduled location(s) value, whichever is less.*
$10,000	Fungus as a Result of a "Covered Cause of Loss"

$10,000	Preservation of Undamaged Covered Property
	Sublimit is $10,000 or 10% of the covered portion of the loss, whichever is less.
$250,000	Professional Services
	Sublimit is $250,000 or 10% of the covered portion of the loss, whichever is less.
$25,000	Fire Department Service Charge
$10,000	Recharging of Fire Extinguishing Equipment
$10,000	Arson Reward
$5,000,000	Increased Cost of Construction - Enforcement of Ordinance or Law
	Sublimit is $5,000,000 or 25% of the covered portion of the loss, whichever is less.
$500,000	Increased Cost of Construction - Cost Resulting from Unforseen Delay
	Sublimit is $500,000 or 25% of the covered portion of the loss, whichever is less.
$500,000	Expenses for Restoration or Modification of Landscaping, Roadways, Paved Surfaces and Underground Utilities
	Sublimit is $500,000 or 25% of the covered portion of the loss, whichever is less.

Additional Coverages - Business Income and Extra Expense

Section XI - Additional Coverages - Business Income and Extra Expense in the PACE Property Coverage Document

$5,000,000	Business Income
$5,000,000	Extra Expense
$25,000	Enforcement of Order by Government Agency or Authority
$25,000	Business Income from Dependent Property
$25,000	Interuption of Utility Services
$25,000	Inability to Discharge Outgoing Sewage

Coverage Extensions

Section XII - Coverage Extensions in the PACE Property Coverage Document

$5,000,000	Property in the Course of Construction
	If you have not complied with all of the notification requirements set forth in Section XII.A. within 90 days, the most the Trust will pay for property in the Course of Construction is $500,000. If after 90 days you have not complied with all the notification requirements set forth in Section XII.A. then no coverage will be provided for property in the Course of Construction.
$500,000	Newly Aquired or Constructed Property
	No coverage will be provided for newly aquired or constructed property unless you notify the Trust in writing no later than 90 days after the dates specified in section XII.A.
$250,000	Unscheduled Outdoor Property
$250,000	Malicious mischief or Vandalism to Tracks and Artifical Turf Fields
$500,000	Property in Transit
$500,000	Accounts Receivable
$50,000	Property Damaged by Overflow of Sewers or Drains
$100,000	Covered Leashold Interest
	Sublimit is lesser of amount listed here or an amount prorated based on time between the Loss and the earlier of: Lease Expiration, Re-occupancy of leased property, or lease of new property.
$500,000	Valuable Papers and Records
	Sublimit is lesser of: Cost to research, replace or restore the lost information; Actual Cash Value of the blank state of the paper, tape or other recording media if records are not actually researched, restored, or replaced; or amount of sublimit listed here.
$25,000	Property Damaged by Computer Virus
$250,000	Miscellaneous Property Damaged by Specified Cause of Loss or Theft
	Sublimit lesser of: Appraised Value, Fair Market Value, or Sublimit listed here.

Additional Sublimits

Sublimits showing below, if any, are in addition to the sublimits shown above.

Locations Covered

Locations that are specifically listed on the Named Participant's Property Schedule.

Perils Covered

Risks of Direct Physical Loss subject to the terms, conditions and exclusions of the PACE Property Coverage Document.

Deductibles

As indicated on the schedule of property values on file with the trust. All deductibles are per occurrence (unless specifically scheduled otherwise).

Contribution

$29,907

Applicable Coverage Document:
PACE Property Coverage Document - 07/01/2025

This proposal only represents a brief summary of Property Coverage. Please refer to the PACE Property Coverage Document for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Earth Movement Endorsement Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

PLEASE CAREFULLY REVIEW THE PROPOSED ENDORSEMENT AS IT MODIFIES/ AMENDS THE PROPERTY COVERAGE DOCUMENT

This proposed endorsement amends the **Property Coverage Document** by adding the following to Section **XII. COVERAGE EXTENSIONS:**

L. Extension of Coverage for Property Damaged by Earth Movement

Subject to the additional conditions and limitations set forth below, we will indemnify you for direct physical loss or damage to **Covered Property** caused by or resulting from **earth movement** that occurs on premises listed on the Schedule of Property Values on file with the Trust.

1. This **Coverage Extension** is subject to per-occurrence deductibles as follows:
   - **a.** The deductible shall be no less than the greater of:
     - **(1)** $5,000;
     - **(2)** Five percent (5%) of the **actual cash value** of the **Covered Property** damaged by **earth movement** in a single **occurrence** on premises listed on the Schedule of Property Values on file with the Trust; or
     - **(3)** The Deductible stated in the Declarations.
   - **b.** The deductible shall be no more than the greater of:
     - **(1)** $50,000; or
     - **(2)** The Deductible stated in the Declarations.
2. For the purposes of this **Coverage Extension** only, **earth movement** means:
   - **a.** Sudden and accidental earthquake, seaquake, shock, tremor, landslide, submarine landslide, avalanche, subsidence, sinkhole, collapse, mud flow, rock fall, or any similar seismic activity, resulting in cracking, lateral movement, rising, shifting, settling, sinking, or upheaval of **land**;
   - **b.** **Flood** that would not have occurred but for tsunami cause by, resulting from, or arising out of **earth movement**, regardless of any other cause or event that contributes concurrently or in any sequence to such **flood**;
   - **c.** **Collapse** directly caused by **earth movement.**
3. **Earth Movement** does not mean, and we will not indemnify you or anyone else for, damage caused by, resulting from, or consisting of:
   - **a.** Gradual cracking, crumbling, horizontal, lateral or vertical movement, rising, shifting, settling, sinking, or upheaval of **land** caused by, exacerbated by, or arising out of artificial means or artifically created soil conditions, including contraction, corrosion, erosion, excessive or insufficient moisture, expansion, freezing, improperly compacted soil, insufficient fill, liquifaction, slope instability, slumping, subsidence, or thawing;
   - **b.** Gradual cracking, crumbling, horizontal, lateral or vertical movement, rising, shifting, settling, sinking, or upheaval of **land** caused by, exacerbated by, or arising out of underground activity of animals, vegetation, or **water**; or
   - **c.** Any **water movement** or **flood**, except for **flood** that would not have occurred but for tsunami caused by, resulting from, or arising out of **earth movement** as described in section **XII.L.2.**

4. All **Earth Movement** that occurs within a 72-hour period will constitute a single **occurrence**.
5. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss cause by or resulting from **earth movement**, unless the damaged **Covered Property** is expressly identified on the Schedule of Property Values on file with the Trust as having coverage for **earth movement**.
6. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss caused by or resulting from **earth movement**, unless the damage or loss occurs during the **Property Coverage Period**, and is discovered and reported to the Trust by you during the **Property Coverage Period**.
7. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss caused by or resulting from **earth movement**, unless you notify us as soon as reasonably possible after the **earth movement** occurs and allow us to inspect the damaged **Covered Property** prior to making any repairs or replacing the damaged or destroyed **Covered Property**.
8. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss caused by or resulting from **earth movement**, if the **Covered Property** damaged by **earth movement** is demolished, discarded, reconstructed, repaired or replaced before the Trust has actually inspected the damage or loss and agreed, in writing, upon the scope of reconstruction, repair, or replacement of the damaged **Covered Property**.
9. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss to boardwalks, bridges, bulkheads, dams, dikes, docks, levees, piers, pilings, seawalls, wharves, or similar property structures located on, in or over water, or their appurtenances or accessories, regardless of whether or not expressly identified as **scheduled outdoor property**, caused by, exacerbated by, or arising out of tsunami.
10. Indemnification under this **Coverage Extension** is subject to the following limits:
    a. The most we will pay under this **Coverage Extension** for all damage or loss sustained by the **Named Participant** in any single **occurrence** is **$10,000,000**;
    b. The most we will pay under this **Coverage Extension** for all damage or loss sustained by the **Named Participant** during the **Coverage Period**, is an **Annual Aggregate Loss Limit** of **$10,000,000**;
    c. The **PACE Per-Occurrence Aggregate Loss Limit**;
    d. A **PACE Annual Aggregate Loss Limit** of **$450,000,000*** for all damage or loss caused by, resulting from, or arising out of **earth movement**, **flood**, or both.
11. Any amounts paid under this **Coverage Extension** are included in, subject to, and not in any event in addition to, the **Total Limit of Indemnification** stated in the Declarations.

This proposed Endorsement ammends Section **XII. Coverage Extensions** of the **Property Coverage Document** only, and does not modify, ammend, waive or otherwise affect any of the other terms, conditions, limitations, exceptions, or exclusions of the **Property Coverage Document**.

* The **PACE Annual Aggregate Loss Limit** is not finalized and is dependent on negotiations with reinsurers. The final limit is not likely to be less than $300,000,000. The finalized **PACE Annual Aggregate Loss Limit** will be listed on the final renewal endorsement.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Flood Endorsement Proposal

Certificate Number: 40P60121-216 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

PLEASE CAREFULLY REVIEW THE PROPOSED ENDORSEMENT AS IT MODIFIES/ AMENDS THE PROPERTY COVERAGE DOCUMENT

This endorsement amends the **Property Coverage Document** by adding the following to Section **XII. COVERAGE EXTENSIONS**:

M. Extension of Coverage for Property Damaged by Flood

Subject to the additional conditions and limitations set forth below, we will indemnify you for direct physical loss or damage to **Covered Property** caused by or resulting from **flood** that occurs on premises listed on the Schedule of Property Values on file with the Trust.

1. This **Coverage Extension** is subject to per-occurrence deductibles as follows:
   - **a.** If the damaged **Covered Property** is located, either partially or wholly, within a federally designated 100-year or greater Special Flood Hazard Area ("SFHA"), as defined by the Federal Emergency Management Agency ("FEMA"), at the time of the **occurrence**, then the deductible shall be:
     - **(1)** $500,000 per occurrence for damage to each covered **building**, **other structure**, **outdoor property** and **scheduled outdoor property** listed on the Schedule of Property Values on file with the Trust;
     - **(2)** $500,000 per occurrence for damage to covered **personal property**, **scheduled personal property**, **fine arts** and **scheduled fine arts** located within each covered **building**, **other structure**, **outdoor property** and **scheduled outdoor property** listed on the Schedule of Property Values on file with the Trust; and
     - **(3)** $500,000 per occurrence for damage to covered **mobile equipment** and **scheduled mobile equipment** listed on the Schedule of Property Values on file with the Trust.
   - **b.** If the damaged **Covered Property** is located, either partially or wholly outside of a federally designated 100-year or greater Special Flood Hazard Area ("SFHA"), as defined by the Federal Emergency Management Agency ("FEMA"), at the time of the **occurrence**, then the deductible shall be:
     - **(1)** no less than the greater of:
       - **(a)** $25,000;
       - **(b)** five percent (5%) of the **actual cash value** of the **Covered Property** damaged by **flood** in a single **occurrence** on the premises listed on the Schedule of Property Values on file with the Trust; or
       - **(c)** the Deductible stated in the Declarations; and
     - **(2)** no more than the greater of:
       - **(a)** $100,000; or
       - **(b)** the Deductible stated in the Declarations.
2. All **Flood** including **collapse** directly caused by **flood**, that occurs within a 72-hour period will constitute a single **occurrence**.
3. Whether or not damaged **Covered Property** is located, either partially or wholly, within a federally designated 100-year or greater SFHA, as defined by FEMA, at the time of **occurrence**, will be determined solely by reference to FEMA Flood Maps and the FEMA Flood Map Service Center, regardless of any previous information, estimate, or designation provided the **Named Participant** or appearing in the Declarations.

4. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss caused by or resulting from **flood**, including **collapse** directly caused by **flood**, unless the damaged **Covered Property** is expressly identified on the Schedule of Property Values on file with the Trust as having coverage for **flood**.
5. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss caused by or resulting from **flood**, including **collapse** directly caused by **flood**, unless the damage or loss occurs during the **Property Coverage Period**, and is discovered and reported to the Trust by you during the **Property Coverage Period**.
6. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss caused by or resulting from **flood**, including **collapse** directly caused by **flood**, unless you notify us as soon as reasonably possible after the **flood** occurs and allow us to inspect the damaged **Covered Property** prior to making any repairs or replacing the damaged or destroyed **Covered Property** .
7. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss caused by or resulting from **flood**, including **collapse** directly caused by **flood**, if the **Covered Property** damaged by **flood** is demolished, discarded, reconstructed, repaired or replaced before the Trust has actually inspected the damage or loss and agreed, in writing, upon on the scope of reconstruction, repair or replacement of the damaged **Covered Property** .
8. This **Coverage Extension** does not apply, and we will not indemnify you for any damage or loss to boardwalks, bridges, bulkheads, dams, dikes, docks, levees, piers, pilings, seawalls, wharves, or similar property or structures located on, in or over **water**, or their appurtenances or accessories, whether or not expressly identified as **Covered Property** , caused by, exacerbated by, or arising out of **flood** , including **collapse** directly caused by **flood** .
9. Indemnification under this **Coverage Extension** is subject to the following limits:
    a. The most we will pay under this **Coverage Extension** for all damage or loss sustained by the **Named Participant** in any single **occurrence** is $5,000,000;
    b. The most we will pay under this **Coverage Extension** for all damage or loss sustained by the **Named Participant** during the **Coverage Period**, is an **Annual Aggregate Loss Limit** of $5,000,000;
    c. The **PACE Annual Aggregate Loss Limit** ;
    d. A **PACE Annual Aggregate Loss Limit** of $100,000,000 for all damage or loss to **Coverage Property** located, either partially or wholly, within a federally designated 100-year or greater SFHA as defined by FEMA.
    e. A **PACE Annual Aggregate Loss Limit** of $450,000,000***** for all damage or loss caused by, resulting from, or arising out of **earth movement**, **flood**, or both.
10. The **Coverage Extension** are included in, subject to, and not in any event in addition to, the **Total Limit of Indemnification** stated in the Declarations.

This proposed Endorsement ammends Section **XII. Coverage Extensions** of the **Property Coverage Document** only, and does not modify, ammend, waive or otherwise affect any of the other terms, conditions, limitations, exceptions, or exclusions of the **Property Coverage Document**.

***** The **PACE Annual Aggregate Loss Limit** is not finalized and is dependent on negotiations with reinsurers. The final limit is not likely to be less than $300,000,000. The finalized **PACE Annual Aggregate Loss Limit** will be listed on the final renewal endorsement.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Proposed Equipment Breakdown/ Boiler and Machinery Coverage Summary

Insured by the Travelers Casualty and Surety Company of America

Travelers Policy Number: BME1-6W78957A-TIL-24 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant
Alsea School District 7J
PO Box B
Alsea, OR 97324

Second Named Participant
Alsea Charter School

Agent of Record
WHA Insurance
2930 Chad Dr
Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Covered Equipment	"Covered Equipment" as defined in the Coverage Form, located at Covered Property listed and specifically described on the Schedule of Property Values on file with the Trust (SDIS).	
Coverage Limit	$12,598,374	Comprehensive Equipment Breakdown - Overall limit of coverage regardless of sub limits.
Sub Limits	$5,000,000	Business Income/ Extra Expense
	$1,000,000	Consequential Loss
	$5,000,000	Demolition and Increased Cost of Construction - Ordinance or Law
	$2,500,000	Expediting Expenses
	$2,500,000	Spoilage
	$1,000,000	Hazardous Substances
	$1,000,000	Ammonia Contamination
	$5,000,000	Water Damage
	$5,000,000	Utility Interuption
	$1,000,000	Media and Data
	$1,000,000	Newly Aquired Locations - 180 Day day reporting
	Included	CFC Refrigerants
	Included	Computer Equipment
Other Conditions	24 Hours	Business Income and Extra Expense Waiting Period
	24 Hours	Utility Interruption Waiting Period
	180 Days	Newly Aquired Locations
Deductibles	$1,000	Per Occurrence - Except motors greater than 500 hp
	$5,000	Per Occurrence - Motors greater than 500 hp
Locations	Property listed as having Equipment Breakdown coverage on the Property and Casualty Coverage for Education Trust (PACE) Schedule of Property Values - Section 1 or the PACE Schedule of Property Values - Section 2.	
Contribution	**$715**	

PACE does not provide the coverage described in this document. PACE procured Equipment Breakdown Coverage from Travelers Casualty and Surety Company of America (Travelers) and permits members of OSBA, who purchase Property coverage from PACE, access to this coverage under the Travelers policy.

This document provides a brief summary of Equipment Breakdown Coverage from Travelers Casualty and Surety Company of America (Travelers) and in-no-way replaces or supersedes the Travelers policy or coverage terms. Please refer to the Travelers Equipment Breakdown Protection Coverage Form and associated documents for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Proposed National Union Fire Comprehensive Crime Coverage Summary

National Union Fire Policy Number: 06-683-04-72 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant	Second Named Participant	Agent of Record
Alsea School District 7J	Alsea Charter School	WHA Insurance
PO Box B		2930 Chad Dr
Alsea, OR 97324		Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

Policy and Coverages	Limits
Government Crime Policy	$1,000,000.00
Forgery or Alteration	
Theft, Disappearance and Destruction	
Section 1 - Inside Premises	
Section 2 - Outside Premises	
Computer Fraud	
Funds Transfer Fraud	
Faithful Performance of Duty	
Money Orders and Counterfeit Money	
Impersonation Fraud ($25,000 deductible)	$250,000.00
Loss Investigation Expense	$25,000

Coverage Modifications

Non Compensated Officers, Directors (includes volunteer workers and students as "Employees")
Deletion of Bonded Employee Exclusion
Deletion of Treasurer or Tax Collector Exclusion

Deductibles and Contributions

Deductible $10,000.00

Contribution $3,070.00

PACE does not provide Crime Coverage. PACE procured Crime Coverage from Chartis Insurance Company and permits members of OSBA, who purchase Property/Casualty coverage from PACE and fulfill certain requirements, to be Additional Insureds on the Chartis Crime Coverage policy. Additional Insureds are bound by, and will not receive benefits that exceed, the deductibles and limits in this document.

This document provides a brief summary of Crime Coverage from Chartis Insurance Company and in-no-way replaces or supersedes the Chartis policy or coverage terms. Please refer to the Chartis Policy and associated documents for detailed coverages, exclusions and conditions.

New coverage or limit increases cannot be bound until review and approval of the application. To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent Requested Effective

PACE Property and Casualty Coverage for Education

Alsea School District 7J

Policy Year: 07/01/25 to 06/30/26

Agent: WHA Insurance

Schedule of Property Values - Section 1
Building, Other Structures and Scheduled Outdoor Property

Premises: CTE Building

Covered Property: CTE Building **Unique ID:** 60121P152138 **Address:** 301 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code		**% Sprinkler**	0	**Appraiser**		**Year Built**	2024	**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**	4400	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$1,932,996.00
Protect Class	7	**Security Alarm**	No	**App Code**		**# of Stories**	0	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$200,000.00
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$5,811	**Total Value**	$2,132,996.00

Premises Total: **Contribution** $5,811 **Total Value** $2,132,996.00

Premises: Dwelling

Covered Property: Dwelling **Unique ID:** 60121P92662W **Address:** 178 S. 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	02-01	**% Sprinkler**	0	**Appraiser**	CBIZ	**Year Built**	1926	**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	Yes	**App Date**	12/13/2023	**Sq Footage**	891	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$144,900.00
Protect Class	7	**Security Alarm**	Yes	**App Code**	01-07	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$0.00
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$356	**Total Value**	$144,900.00

Covered Property: Storage **Unique ID:** 60121P119986S **Address:** 178 S. 3rd Street Alsea OR, 97324 **Coverage Class:** Other Structure

Loc Code	02-02	**% Sprinkler**	0	**Appraiser**		**Year Built**		**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**	503	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$9,082.12
Protect Class	7	**Security Alarm**	No	**App Code**		**# of Stories**	0	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$18,164.25
Const Class	NONCOMBUSTIBLE	**Comments**						**Remodel**	No	**Contribution**	$72	**Total Value**	$27,246.37

Covered Property: Storage **Unique ID:** 60121P127407W **Address:** 267 Market Street Alsea OR, 97324 **Coverage Class:** Other Structure

Loc Code	03-02	**% Sprinkler**	0	**Appraiser**		**Year Built**		**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**	503	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$3,148.47
Protect Class	7	**Security Alarm**	No	**App Code**		**# of Stories**	0	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$21,528.00
Const Class	NONCOMBUSTIBLE	**Comments**						**Remodel**	No	**Contribution**	$65	**Total Value**	$24,676.47

Premises Total: **Contribution** $494 **Total Value** $196,822.84

Premises: Elementary School

Covered Property: Bus Garage **Unique ID:** 60121P557 **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	01-02	**% Sprinkler**	0	**Appraiser**	CBIZ	**Year Built**	1971	**Equip Brk Cov**	Yes	**Flood Zone***	C	**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**	12/13/2023	**Sq Footage**	1150	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$138,690.00
Protect Class	7	**Security Alarm**	No	**App Code**	01-09	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$65,061.23
Const Class	NONCOMBUSTIBLE	**Comments**						**Remodel**	No	**Contribution**	$539	**Total Value**	$203,751.23

Covered Property: Electronic Reader Board **Unique ID:** 60121P48316W **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Scheduled Outdoor Property

Loc Code	01-09	**% Sprinkler**	0	**Appraiser**		**Year Built**	2016	**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**		**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$41,713.45
Protect Class	7	**Security Alarm**	No	**App Code**		**# of Stories**	0	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$0.00
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$114	**Total Value**	$41,713.45

Covered Property: Grandstand **Unique ID:** 60121P561 **Address:** 310 S 3rd Avenue Alsea OR, 97324 **Coverage Class:** Other Structure

Loc Code	01-05	**% Sprinkler**	0	**Appraiser**	CBIZ	**Year Built**	1949	**Equip Brk Cov**	Yes	**Flood Zone***	A	**Valuation**	Actual Cash
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**	12/13/2023	**Sq Footage**	3105	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$353,970.00
Protect Class	7	**Security Alarm**	No	**App Code**	01-02	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$538.20
Const Class	FRAME	**Comments**	Condition of structure					**Remodel**	No	**Contribution**	$966	**Total Value**	$354,508.20

Covered Property: Irrigation Pump House **Unique ID:** 60121P555 **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	01-08	**% Sprinkler**	0	**Appraiser**		**Year Built**	1970	**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**	48	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$11,930.19
Protect Class	7	**Security Alarm**	No	**App Code**	01-10	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$1,035.00
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$35	**Total Value**	$12,965.19

Covered Property: Main Building **Unique ID:** 60121P566 **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	01-01	**% Sprinkler**	100	**Appraiser**	CBIZ	**Year Built**	1949	**Equip Brk Cov**	Yes	**Flood Zone***	D	**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	Yes	**App Date**	12/13/2023	**Sq Footage**	25942	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$6,764,759.95
Protect Class	7	**Security Alarm**	Yes	**App Code**	01-01	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$1,305,224.11
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$17,858	**Total Value**	$8,069,984.06

Covered Property: Modular Annex **Unique ID:** 60121P563 **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	01-07	**% Sprinkler**	0	**Appraiser**	CBIZ	**Year Built**	1971	**Equip Brk Cov**	Yes	**Flood Zone***	C	**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	Yes	**App Date**	12/13/2023	**Sq Footage**	3472	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$648,944.99
Protect Class	7	**Security Alarm**	Yes	**App Code**	01-03	**# of Stories**	2	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$51,955.04
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$1,723	**Total Value**	$700,900.03

Covered Property: Modular Classroom - 6th Grade **Unique ID:** 60121P562 **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	01-06	**% Sprinkler**	0	**Appraiser**	CBIZ	**Year Built**	1971	**Equip Brk Cov**	Yes	**Flood Zone***	C	**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	Yes	**App Date**	12/7/2023	**Sq Footage**	990	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$142,830.00
Protect Class	7	**Security Alarm**	Yes	**App Code**	01-06	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$24,975.67
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$413	**Total Value**	$167,805.67

Covered Property: Modular Resource Room **Unique ID:** 60121P559 **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	01-04	**% Sprinkler**	0	**Appraiser**	CBIZ	**Year Built**	1949	**Equip Brk Cov**	Yes	**Flood Zone***	C	**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	Yes	**App Date**	12/13/2023	**Sq Footage**	1736	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$224,595.00
Protect Class	7	**Security Alarm**	Yes	**App Code**	01-04	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$74,813.91
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$736	**Total Value**	$299,408.91

Covered Property: Play Shed **Unique ID:** 60121P558 **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Other Structure

Loc Code	01-03	**% Sprinkler**	0	**Appraiser**	CBIZ	**Year Built**	1982	**Equip Brk Cov**	Yes	**Flood Zone***	C	**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**	12/13/2023	**Sq Footage**	3542	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$275,310.00
Protect Class	7	**Security Alarm**	No	**App Code**	01-05	**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$538.20
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$752	**Total Value**	$275,848.20

Covered Property: Storage **Unique ID:** 60121P127411W **Address:** 301 S 3rd Street Alsea OR, 97324 **Coverage Class:** Other Structure

Loc Code	01-10	**% Sprinkler**	0	**Appraiser**		**Year Built**		**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**	503	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$3,148.47
Protect Class	7	**Security Alarm**	No	**App Code**		**# of Stories**	0	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$5,382.00
Const Class	NONCOMBUSTIBLE	**Comments**						**Remodel**	No	**Contribution**	$23	**Total Value**	$8,530.47

Covered Property: Storage **Unique ID:** 60121P127413W **Address:** 301 S 3rd Street Alsea OR, 97324 **Coverage Class:** Other Structure

Loc Code	01-11	**% Sprinkler**	0	**Appraiser**		**Year Built**		**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**	503	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$3,148.47
Protect Class	7	**Security Alarm**	No	**App Code**		**# of Stories**	0	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$5,382.00
Const Class	NONCOMBUSTIBLE	**Comments**						**Remodel**	No	**Contribution**	$23	**Total Value**	$8,530.47

Premises Total:	**Contribution**	$23,181	**Total Value**	$10,143,945.88

Premises: High School

Covered Property: Modular Building **Unique ID:** 60121P119984S **Address:** 310 S 3rd Street Alsea OR, 97324 **Coverage Class:** Building

Loc Code	01-12	**% Sprinkler**	0	**Appraiser**		**Year Built**	2021	**Equip Brk Cov**	Yes	**Flood Zone***		**Valuation**	Replacement
Vacant (Y/N)	No	**Fire Alarm**	No	**App Date**		**Sq Footage**	315	**Flood Cov**	Yes	**Eff Date**	7/1/2025	**Structure Value**	$76,289.85
Protect Class	7	**Security Alarm**	No	**App Code**		**# of Stories**	1	**Earthquake Cov**	Yes	**Deductible**	$5,000	**Pers Prop Value**	$1,210.95
Const Class	FRAME	**Comments**						**Remodel**	No	**Contribution**	$211	**Total Value**	$77,500.80

Premises Total:	**Contribution**	$211	**Total Value**	$77,500.80

* Flood Zones shown on the Schedule of Property Values are an estimate, either provided by the member, the insurance agent, or an independent appraiser. It is not a guarantee that the location is or is not in federally designated Special Flood Hazard Area (SFHA). In the event of a covered claim under this Supplemental Coverage, a determination on the flood zone will be made based on a review of Federal Emergency Management Agency flood maps, not by the estimated flood zone indicated on this Schedule of Property Values. If there is any question that a location is in a Special Flood Hazard Area, then make sure you obtain NFIP coverage for the location.

Total Structure Value	$10,775,456.96
Total Personal Property Value	$1,775,808.56
Total Value	$12,551,265.52
Total Contribution	$29,696

Construction Class Options

Fire Resistive
Modified Fire Resistive
Masonry Noncombustible
Noncombustible
Joisted Masonry
Frame

Valuation Options

Actual Cash Value
Replacement
Stated Amount

Protection Class Description

Fire Protection Class is determined by the level of fire protection in your area. Your local fire department should be able to tell you which Protection Class your property is in.

Alsea School District 7J

Policy Year: 07/01/25 to 06/30/26

Agent: WHA Insurance

Schedule of Property Values - Section 2

*Scheduled **Mobile Equipment**, Scheduled **Personal Property**, Scheduled **Fine Arts***

Code	Description	Coverage Class	Deductible	Serial Number	Valuation	Effective Date	Expiration Date	Value	Contribution
	Kubota Tractor w/ attachments	Mobile Equipment	$1,000	L341ODT	Stated Value	7/1/2025	6/30/2026	$18,000	$80.30
	Kubota,Zero-turn Mower	Mobile Equipment	$1,000	ZD1611LF-72	Stated Value	7/1/2025	6/30/2026	$22,109	$98.62
	Scissor Lift Skyjack	Mobile Equipment	$1,000	SJ1113219	Stated Value	7/1/2025	6/30/2026	$7,000	$31.23
							Totals:	**$47,109**	**$210.15**

* Any equipment or item $10,000 or greater in value must be specifically scheduled.
* All equipment or items less than $10,000 in value may be aggregated together and reported as one total miscellaneous amount.

Cyber

PACE Property and Casualty Coverage for Education

Proposed AIG Cyber Liability and Cyber Extortion Coverage Summary

AIG Policy Number: 01-267-34-38 **Coverage Period:** 7/1/2025 through 6/30/2026

Named Participant	Second Named Participant	Agent of Record
Alsea School District 7J	Alsea Charter School	WHA Insurance
PO Box B		2930 Chad Dr
Alsea, OR 97324		Eugene, OR 97408

Proposal is provided only for those coverages where a contribution is shown.

AIG Coverage Sections	Deductibles	Contribution
Security And Privacy	$5,000	Included
Event Management	$5,000	Included
Media Content	$5,000	Included
Network Interuption	$5,000	Included
Cyber Extortion	$25,000	Included

AIG Cyber Liability Coverage Limits

With respect to this Coverage, to this Additional Insured(s), AIG will not be liable, in any one annual coverage period, for more than:	$1,000,000
Annual Aggregate Limit - Regardless of the number of Additional Insureds that experience a loss; the most AIG will pay to all Additional Insureds in the aggregate for the Cyber Liability Coverage, in any one annual coverage period, is:	$5,000,000 (1)

AIG Cyber Extortion Coverage Limits

With respect to this Coverage to this Additional Insured, AIG will not be liable, in any one annual coverage period, for more than:	$200,000 (2)
Annual Aggregate Limit - Regardless of the number of Additional Insureds that experience a loss; the most AIG will pay for this Cyber Extortion Coverage, in any one annual Coverage Period, is:	$2,000,000 (1) (2)

PACE does not provide Cyber Liability or Cyber Extortion Coverage ('Cyber Coverage'). PACE procured Cyber Coverage from AIG Insurance and permits members of OSBA, who purchase Property/Casualty coverage from PACE and fulfill certain requirements, to be Additional Insureds on the AIG Cyber Coverage policy. Additional Insureds are bound by, and will not receive benefits that exceed, the deductibles and limits in this document.

This document provides a brief summary of Cyber Coverage from AIG and in-no-way replaces or supersedes the AIG policy or coverage terms. Please refer to the AIG Cyber Coverage Policy and associated documents for detailed coverages, exclusions and conditions.

To request that coverage be bound, please sign, date and return this Proposal before the effective date.

Accepted by: _____ Date: _____

Authorized Representative/Agent Requested Effective

(1) This Annual Aggregate Limit amount will be paid and reduced by claims of all Additional Insureds in the order in which the claims are paid by AIG. In the event the incurred losses arising from a single claim involving multiple Additional Insureds exceeds any remaining annual aggregate limit, that remaining amount will be paid on a pro-rata basis among those Additional Insureds involved in the claim.

(2) These limits include all amounts paid for Cyber Extortion claims including, but not limited to, loss amounts as well as defense and investigation expenses.

PACE Property and Casualty Coverage for Education

2024/ 2025 to 2025/ 2026 Premium and Rate Comparison

Alsea School District 7J

Coverage	2024/ 2025 Policy Year			2025/ 2026 Policy Year			2024/ 2025 to 2025/ 2026 Changes		
	Premium	Exposure	Rate	Premium	Exposure	Rate	Premium Change	% Premium Change	% Rate Change
Property	$32,326	$12,180,698	$26.54	$30,622	$12,598,374	$24.31	-$1,704	-5.27%	-8.41%
Liability (including SAM)	$31,156	$269	$115.82	$30,720	$222	$138.38	-$436	-1.40%	19.48%
Automobile	$43,452	18	$2,414.02	$35,016	18	$1,945.33	-$8,436	-19.42%	-19.42%
Crime	$1,491			$3,070			$1,579	105.90%	
Totals	$108,426			$99,428			-$8,998	-8.30%	

Liability Exposure = ADA for School Districts, Public Resources for Community Colleges and General Services Grant for Education Service Districts

Property Exposure = Total Insured Value (TIV)

Automobile Exposure = Automobile Count

Workers' Compensation

saif

Carrier no: 20001

Information Page

Policy no: 470295
Employer identification no: 93-6000203
NCCI Risk ID no: 915051537

Item 1. **The Insured:**
Benton County School District 7-Cj

Entity Type:
Political Subdivision: School

Mailing address:
BENTON COUNTY SCHOOL DISTRICT 7-CJ
PO BOX B
ALSEA, OR 97324-0120

Agent:
WHA - PUBLIC ENTITIES
WHA INSURANCE AGENCY INC
2930 CHAD DR
EUGENE, OR 97408-7381

Other workplaces not shown above:
Benton County School District 7-Cj
301 S 3rd St
Alsea, OR 97324-9643

Alsea High School

Alsea Elementary School

Item 2. **The policy period** is from 07/01/2025, 12:01 A.M. to 07/01/2026, 12:01 A.M. at the insured's mailing address.

Item 3. **A.** **Workers Compensation Insurance: Part One** of the policy applies to the Workers Compensation Law of the states listed here: OREGON.

B. **Employers Liability Insurance: Part Two** of the policy applies to work in each state listed in item 3.A. The limits of our liability under Part Two are:

Bodily Injury by Accident $500,000 each accident
Bodily Injury by Disease $500,000 each employee
Bodily Injury by Disease $500,000 policy limit

C. **Other States Insurance: Part Three** of the policy applies to the states, if any, listed here:
NONE

D. **This policy includes these endorsements and schedules:**

WC000424	Audit Noncompliance Charge Endorsement
WC990616	Confidentiality Endorsement
WC360604	Oregon Amendatory Endorsement
WC000414A	90-Day Reporting Requirement-Notification of Change in Ownership Endorsement
WC990401C	Premium Payment Rating Plan Endorsement
WC890406	Policy Information Page Endorsement
WC360601E	Oregon Cancellation Endorsement
WC000421F	Catastrophe (Other Than Certified Acts of Terrorism) Premium Endorsement
WC000422C	Terrorism Risk Insurance Program Reauthorization Act Disclosure endorsement.
WC000406A	Premium Discount Endorsement
WC000419A	Part Five - Premium Amendatory Endorsement

Item 4. **The premium** for this policy will be determined by our Manuals of Rules, Classifications, Rates and Rating Plans. The experience rating modification factor and other rating plan factors, if any, may change on your rating effective date of 7/1/2026. All information required below is subject to verification and change by audit.

400 High Street SE
Salem, OR 97312
P: 800.285.8525
F: 503.373.8020

Rating period: 07/01/2025 to 07/01/2026
Location 1: Benton County School District 7-Cj

Classification description	Class	Subject payroll	Rate	Premium
School-Bus Drivers	7380	$365,239.00	3.75	$13,696.46
School-Professional Emp & Clerical	8868	$2,476,739.00	0.29	$7,182.54
Work Experience-No Manual Labor	8868	$0.00	0.29	$0.00
School-All Other Employees	9101	$141,304.00	2.1	$2,967.38
Work Experience-Manual Labor	9101	$0.00	2.1	$0.00
School-Cafeteria/Kitchen Empl	9349	$52,238.00	2.1	$1,097.00
Total manual premium		**$3,035,520.00**		**$24,943.38**
Total subject premium				**$24,943.38**

Description	Basis	Factor	Premium
Experience Rating	$24,943.38	1.1	$2,494.34
Total modified premium			**$27,437.72**

Description	Basis	Factor	Premium
Pre-pay credit	$27,437.72	0.985	-$411.57
Total standard premium			**$27,026.15**

Description	Basis	Factor	Premium
Oregon Total Premium			$27,026.15
Premium Discount	$27,026.15	0.1123	-$3,034.31
Terrorism Premium	$3,035,520.00	0.005	$151.78
Catastrophe Premium	$3,035,520.00	0.01	$303.55
DCBS Assessment	$24,447.17	1.098	$2,395.82
Total premium and assessment			**$26,842.99**

Policy Minimum Premium: $500

Your policy premium is based on your current estimated premium and may be prorated for policies in effect for less than a full year or adjusted based on actual payroll by classification.

Terrorism Premium is in addition to Policy Minimum Premium.

Catastrophe Premium is in addition to Policy Minimum Premium.

Payroll Reporting Frequency: Annual

Policyholder Option to Reimburse SAIF Corporation for Medical Expenses (Nondisabling Claims Reimbursement Program): This policyholder has chosen to enroll in the Nondisabling Claims Reimbursement program with Quarterly claim evaluation.

WORKERS COMPENSATION AND EMPLOYERS LIABILITY
INSURANCE POLICY - INFORMATION PAGE

Servicing Office:

Insurance for this coverage part provided by:

Zurich American Insurance Company

SCHAUMBURG
1299 ZURICH WAY
SCHAUMBURG, IL 60196

1. Policy Number: WC 9552801 - 03

Renewal of Number: WC 9552801 - 02

Named Insured and Mailing Address

Benton County School District 7-Cj
Alsea School District 7J
Po Box B
Alsea, OR 97324-0120

Producer and Mailing Address

UNITED STATES INSURANCE SERVICES
1190 WINTERSON RD STE 100
LINTHICUM, MD 21090-2245

Producer Code: 15594000

Other workplaces not shown above: See Schedule of Locations

FEIN: 93-6000203

NCCI Company No.: 10863 ☐ New ☒ Renewal ☐ Rewrite of Prior Policy No. WC 9552801 - 02

This information page, with policy provisions and endorsements, if any, completes this policy.

Insured is: Government entity

2. Policy Period: From: 07/01/2025 to: 07/01/2026 at 12:01 A.M. Standard Time at insured's mailing address.

Insured's Identification number(s): See Schedule Locations

3. A. Workers Compensation Insurance: Part One of the policy applies to the Workers' Compensation Law of the states listed here:
Idaho

B. Employers Liability Insurance: Part Two of the policy applies to work in each state listed in Item 3.A.
The limits of liability under Part Two are:

Bodily Injury by Accident:	$500,000	each accident
Bodily Injury by Disease:	$500,000	policy limit
Bodily Injury by Disease:	$500,000	each employee

C. Other States Insurance: Part Three of the policy applies to the states, if any, listed here:
All states except ND, OH, WY, WA, OR and those states listed in 3A

D. This Policy includes these Endorsements and Schedules:
See Schedule of Forms and Endorsements.

4. The premium for this policy will be determined by our Manuals of Rules, Classifications, Rates and Rating Plans. All information required on the following Classification Schedule is subject to verification and change by audit.
See Classification Schedule

TOTAL ESTIMATED STANDARD PREMIUM	$	561.00
PREMIUM DISCOUNT	$	
EXPENSE CONSTANT	$	100.00
PREMIUM FOR ENDORSEMENT	$	
TAXES AND SURCHARGES	$	
TOTAL ESTIMATED ANNUAL PREMIUM	$	575.00
MINIMUM PREMIUM	$	152.00
DEPOSIT PREMIUM	$	575.00

If indicated below, adjustment of premium shall be made:

☒ Annually ☐ Monthly
☐ Semi-Annually ☐ This is a Three Year
☐ Quarterly Fixed Rate Policy

Agent or Producer | Countersigned by Resident Licensed Agent | Date

Workers Compensation and Employers Liability Insurance Policy

Schedule of Insureds and Locations

Branch	Policy Number WC 9552801 - 03	Producer Code 15594000

SCHEDULE OF INSUREDS AND LOCATIONS

Benton County School District 7-Cj

DBA: Alsea School District 7J

FEIN : 93-6000203, Risk ID : 360216365 , 915051537 , 360216365 , 915051537 , 360216365, SIC CODE : 8221

1241 E Pleasant Ave	Challis	ID	83226-7726

Issue Date: 08/05/2022

Workers Compensation Classification Schedule

Insurance for this coverage part provided by
Zurich American Insurance Company

Policy number
WC 9552801 - 03

Loc.	ITEM 4. CLASSIFICATION OF OPERATIONS Entry in this item, except as specifically provided elsewhere in this policy, does not modify any of the other provisions of this policy.		Code No.	PREMIUM BASIS Total Estimated Annual Remuneration	RATES Per $100 of Remuneration	Estimated Annual Premium
	Benton County School District 7-Cj FEIN# 93-6000203 NAICS CODE 611310					
	1241 E Pleasant Ave Challis, ID 83226-7726					
	College-Professional Employees & Clerical		8868	$ 66,193	0.52	$ 344.00
	Total Manual Premium					$ 344.00
	Increase Limits	0.8%	9807			$ 3.00
	Increased Limit Charge		9848			$ 72.00
	Total Subject Premium					$ 419.00
	Experience Premium	1.1	9898			$ 42.00
	Total Modified Premium					$ 461.00
	Total Standard Premium					$ 561.00
	Terrorism	0.01	9740			$ 7.00
	Catastrophe (Other Than Certified Acts of Terrorism)	0.01	9741			$ 7.00
	Estimated Annual Premium					$ 575.00
	Expense Constant		0900			$ 100.00
	Total Amount Due					$ 575.00
	Policy Total Estimated Cost					$ 575.00

Contact Us

Phone: (800) 852-6140
Email: info@whainsurance.com
Web: www.whainsurance.com

Eugene Office
2930 Chad Drive
Eugene, OR 97408

Wilsonville Office
25030 SW Parkway Ave
#330
Wilsonville, OR 97070

Bend Office
2900 NW Clearwater Drive
Ste 100 & 200
Bend, OR 97703

Mission Statement

Our mission is to act in the best interest of our clients as their trusted insurance and risk management advisors.

© WHA Insurance. The material in this publication is the property of WHA Insurance unless otherwise noted and may not be reproduced without its written consent by any person other than a current insured of WHA Insurance for business purposes. Insured should attribute use as follows: "© WHA Insurance. Used with permission by WHA Insurance."

This material is intended to be a broad overview of the subject matter and is provided for informational purposes only. WHA Insurance does not provide legal advice to its insureds, nor does it advise insureds on employment-related issues. Therefore, the subject matter is not intended to serve as legal or employment advice for any issue(s) that may arise in the operations of its insureds. Legal advice should always be sought from the insured's legal counsel. WHA Insurance shall have neither liability nor responsibility to any person or entity with respect to any loss, action, or inaction alleged to be caused directly or indirectly as a result of the information contained herein.

Copyright © WHA INSURANCE AGENCY INC.
PEPR001ver2

c. Classified, Administrative, Supervisory and Confidential Salary Increase Approval

Alsea School District Administrative/Confidential/Supervisory Salary Schedule

2024-25 Increase 2.00%

Licensed Administrator Positions	Days	Hours/Day	Total Hours	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10
Building Principal	210	8	1,680	84,706	86,400	88,128	89,891	91,689	93,523	95,393			
Building Assistant Principal	195	8	1,560	76,440	77,969	79,528	81,119	82,741	84,396	86,084			
Supervisory/Confidential Positions													
Business Manager	260	8	2,080	74,365	75,852	77,369	78,917	80,495	82,105	83,747	85,422	87,130	88,873
Executive Assistant	260	8	2,080	55,894	57,012	58,152	59,315	60,501	61,711	62,946	64,205	65,489	66,798
Technology Coordinator	240	8	1,920	64,567	65,858	67,175	68,519	69,889	71,287	72,713	74,167	75,650	77,163
Maintenance/Transportation Supervisor	260	8	2,080	79,947	81,346	82,773	84,229	85,713	87,227	88,772	90,347	91,954	93,594

2025-26 PROPOSED Increase 2.00%

Licensed Administrator Positions	Days	Hours/Day	Total Hours	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10
Building Principal	210	8	1,680	86,400	88,128	89,891	91,689	93,523	95,393	97,301			
Building Assistant Principal	195	8	1,560	77,969	79,528	81,119	82,741	84,396	86,084	87,806			
Supervisory/Confidential Positions													
Business Manager	240	8	1,920	75,852	77,369	78,916	80,495	82,105	83,747	85,422	87,130	88,873	90,650
Executive Secretary	240	8	1,920	52,626	53,679	54,752	55,847	56,964	58,103	59,266	60,451	61,660	62,893
Human Resource/District Services Secretary	220	8	1,760	48,241	49,206	50,190	51,193	52,217	53,261	54,327	55,414	56,522	57,652
Technology Coordinator	240	8	1,920	65,858	67,175	68,519	69,889	71,287	72,713	74,167	75,650	77,163	78,706
Maintenance/Transportation Supervisor	260	8	2,080	81,546	82,973	84,428	85,914	87,427	88,972	90,547	92,154	93,793	95,466

Alsea School District 7J
2025-26 Proposed Salary Schedule

	COLA	2.0%								
	Step	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Position	1	2	3	4	5	6	7	8	9	10+
Bus Driver - Regular	$ 26.01	$ 26.53	$ 27.06	$ 27.60	$ 28.15	$ 28.71	$ 29.28	$ 29.87	$ 30.47	$ 31.08
Bus Monitor	15.61	15.92	16.24	16.56	16.89	17.23	17.57	17.92	18.28	18.65
Bus Driver Trainer	27.05	27.59	28.14	28.70	29.27	29.86	30.46	31.07	31.69	32.32
Mechanic	27.05	27.59	28.14	28.70	29.27	29.86	30.46	31.07	31.69	32.32
Dispatcher	18.73	19.10	19.48	19.87	20.27	20.68	21.09	21.51	21.94	22.38
Instructional Assistant I	15.61	15.92	16.24	16.56	16.89	17.23	17.57	17.92	18.28	18.65
Instructional Assistant II	17.17	17.51	17.86	18.22	18.58	18.95	19.33	19.72	20.11	20.51
Instructional Assistant III	18.73	19.10	19.48	19.87	20.27	20.68	21.09	21.51	21.94	22.38
Transitions/School to Work	17.69	18.04	18.40	18.77	19.15	19.53	19.92	20.32	20.73	21.14
Custodian I	15.61	15.92	16.24	16.56	16.89	17.23	17.57	17.92	18.28	18.65
Family Outreach I	18.23	18.59	18.96	19.34	19.73	20.12	20.52	20.93	21.35	21.78
Family Outreach II	23.93	24.41	24.90	25.40	25.91	26.43	26.96	27.50	28.05	28.61
Secretary I - Clerical	16.13	16.45	16.78	17.12	17.46	17.81	18.17	18.53	18.90	19.28
Secretary II - Head Secretary	20.81	21.23	21.65	22.08	22.52	22.97	23.43	23.90	24.38	24.87
Payroll	24.97	25.47	25.98	26.50	27.03	27.57	28.12	28.68	29.25	29.84
Accounts Payable	22.37	22.82	23.28	23.75	24.23	24.71	25.20	25.70	26.21	26.73
HR Assist / Benefits	20.81	21.23	21.65	22.08	22.52	22.97	23.43	23.90	24.38	24.87
Food Service Coordinator	17.69	18.04	18.40	18.77	19.15	19.53	19.92	20.32	20.73	21.14
Food Service Worker	15.09	15.39	15.70	16.01	16.33	16.66	16.99	17.33	17.68	18.03
Administrative Assistant to District Office	26.01	26.53	27.06	27.60	28.15	28.71	29.28	29.87	30.47	31.08
Administrative Assistant to SpEd Director	26.01	26.53	27.06	27.60	28.15	28.71	29.28	29.87	30.47	31.08

Other (No change)	
Type 10 Driver	$ 16.00
Bus Driver - Wait Time	16.00
Sub positions	Step 1

d. Personal Service Contract - Business Manager

Donald E Staehely LLC

10825 S New Era Rd, Canby, OR 97013 Phone: 503-380-3772

PERSONAL SERVICES CONTRACT # Requisition Order Number

THIS PERSONAL SERVICES CONTRACT ("Contract"), made and entered into as of the ___ day of ___, 2024 by and between Alsea School District ("District") and **Donald E Staehely LLC** ("Contractor"). The District requires services which the Contractor represents that it is capable of providing, and desires to enter into an agreement with Contractor under the following terms and conditions, including but not limited to the attached General Terms and Conditions, which are incorporated herein by this reference.

1. SERVICES

Contractor will perform the scope of business manager services, together with all other services necessary or incidental to perform the required services in a manner satisfactory to District.

2. TERM

The term of this Contract will commence on July 1, 2025, and continue until June 30, 2026, unless earlier terminated in accordance with this contract.

3. COMPENSATION

As full consideration for performance of the Services, District will pay $65 per hour. The maximum amount for services rendered is $84,000. The District will also reimburse mileage at the IRS rate.

4. TERMINATION

If it is beneficial to the District to terminate this agreement, the district only needs to provide a written notice defining the last date the Contractor will provide services pursuant to this agreement. If the Contractor terminates the agreement, the Contractor must provide in writing a 30-day notice to the District.

5. MODIFICATION

District may at any time, without invalidating this Contract, direct Contractor to prepare a draft modification that describes any scope-related changes to the Services that the District deems desirable. Upon receipt of those directions, provided they do not materially change the nature of the Contract or exceed Contractor's capacity to perform (to be determined in Contractor's reasonable discretion), Contractor will promptly prepare and submit to District a draft modification reflecting the District's desired changes and proposing reasonable adjustments, if any, to the work schedule and delivery dates for the Services, or the amount of Contractor's compensation. No modification of the terms of this Contract, including assignment of rights or obligations, will be effective unless made in writing and signed by all parties.

THE DISTRICT IS NOT BOUND OR OBLIGATED BY THIS CONTRACT AND NO WORK SHALL COMMENCE UNTIL ALL DISTRICT APPROVALS HAVE BEEN SECURED AS REQUIRED BY DISTRICT

_____	_____	_____	_____
Donald E Staehely	Date	District authorized representative	Date

6. **Old Business**

a. Review of IIBG and IIBG-AR

Code: IIBG
Adopted:

Responsible Use of Technology

The Board believes access to technology should be equitable for all students, differentiated to meet varied student needs, and utilized and promoted in a transformational manner that enhances academic achievement. The Distirct shall guide the responsible use of technology including, but not limited to, generative artificial intelligence and other technologies, and shall outline best practices for technology use. The Board encourages staff to responsibly integrate technology into instruction in a manner that promotes student engagement, future readiness, innovation, and expanded learning opportunities.

The Board authorizes the superintendent to develop and implement administrative regulations governing how and when technology use is allowed or disallowed. Such procedures will protect appropriate staff and student use of technology and encourage equitable opportunities for learning about and experiencing technology.

The superintendent implements this policy by developing and implementing procedures listed in IIBG-AR.

END OF POLICY

DRAFT

Code: IIBG-AR
Adopted: ~~8/26/24~~

Responsible Use of Technology

Definitions

Technology: Any digital tool or mechanical system designed to enhance tasks, communication, or learning experiences.

Universal Design for Learning (UDL): A framework for flexible learning environments where all students can access, engage with, and express their knowledge and skills in diverse and varied ways.

Artificial Intelligence (AI): A machine-based system that can, for a given set of human-defined objectives, make predictions, recommendations, or decisions influencing real or virtual environments.[1]

Generative AI: The class of AI models that emulate the structure and characteristics of input data to generate derived synthetic content.[2]

Technology-Generated Material: Texts, images, audio files, videos, and other material produced by artificial intelligence or other technologies.

Deepfake: Highly realistic and manipulated media created using advanced technology such as artificial intelligence and machine learning.

Cheapfake: Manipulated media created using simple editing tools, with or without technology.

Purpose

The District enforces the administrative rules listed below so students and staff may be empowered to use technology in an innovative, informed, and equitable manner to support Board Policy ACB - Every Student Belongs.

Student Responsibilities

1. Student Technology Expectations:

    a. Use technology honestly, respectfully, and responsibly.
    b. Follow instructor guidance and classroom technology use agreements.
    c. Actively avoid using technology in a harmful or dishonest manner.
    d. Follow the guidance listed in the District Student Rights and Responsibilities Handbook.

[1] Exec. Order 14110.2023
[2] Exec. Order 14110.2023

DRAFT

Shared Student, Staff, and Administrator Responsibilities

1. Manage Data Responsibly

    a. Keep full names, passwords, addresses, personal information, identification numbers, video and images of staff and students private.
    b. Review and adjust privacy settings.
    c. Report harmful and suspicious online activity such as unauthorized mimicry (deepfakes, etc), cyberbullying, and phishing (false emails, etc.).

2. Conscious When Creating Content

    a. Avoid creating or generating inaccurate, harmful, or inappropriate content in material.

3. Review Material for Accuracy, Bias, and Potential Harm

    a. Review material for bias, accuracy and potential harm before sharing it or using it in research.

4. Honor Agreements

    a. Comply with product-specific usage agreements for all technologies used on campus on district-provided devices off campus.

5. Avoid Mimicry:

    a. Avoid creating material mimicking the likeness, voice, or copyrightable material of students, staff and others, such as deepfakes and cheapfakes, unless it is created ethically and transparently.

        (1) Mimicry regarding minors is prohibited unless there is clear educational value and parent/guardian permission is obtained in writing in advance.
        (2) Prior consent and post-generation approval shall be gathered in writing and kept on file if creating any type of material that could be considered mimicry.
        (3) Harmful or inappropriate mimicry is always prohibited, regardless of consent, and will invoke discipline from a school administrator.

~~6. Practice Disclosure and Citation:~~

~~a. Disclose, credit, and cite technology-generated material utilized in research papers, publications, essays, and other applicable instances following Board Policy IKI Academic Integrity.~~

Shared Staff and Administrator Responsibilities

1. Staff Technology Expectations

    a. Use technology equitably, inclusively, appropriately, and innovatively following district policies.

DRAFT

2. Classroom Technology Use Agreements:

    a. Create clear, classroom-specific technology expectations, include them in the course syllabus and student guides, and communicate them to students.

3. Select, Deselect and Mitigate Technology-Related Material

    a. Select, and deselect, technology product content and technology-generated material following the criteria and processes listed in District Policy IIA-AR(1) - Instructional Materials.
    b. Mitigate biased, inaccurate, or potentially harmful content if it appears in technology, or technology-generated material, utilized or referenced in the classroom.

4. Planning for Student Technology Use

    a. Consult with the District Technology Director about the District's approved Digital Resource Menu before allowing or requiring students to use specific technology.
    b. Submit a written request to the District Technology Director for approval for student access to unlisted technology at school and on district-provided devices.
    c. Submit a written request to the Director of Technology if it appears as though a website or other technology is blocked unnecessarily.

5. Instructional Practices

    a. Integrate technology into instruction to enhance learning and increase opportunities for students to engage with and practice responsible technology use.
    b. Explicitly teach digital citizenship and media literacy skills at least twice per year, continuously reinforce digital citizenship concepts, and model best practices.
    c. Remind students to protect their personal and sensitive information regularly.
    d. Integrate differentiated instruction, collaboration, and productive discourse.
    e. Include Universal Design for Learning (UDL) scaffolds and supports to provide multilingual, multimodal, and accessible learning.
    f. Align lessons with district initiatives and International Society for Technology in Education (ISTE) standards.

6. Student Accommodations

    a. Honor student accommodations established by the student's Individualized Educational Plan (IEP) or 504 regarding using generative AI or other assistive technologies at all times.

School Administrator Responsibilities

1. Oversee Building Technology Use

    a. Direct, promote, and support learning opportunities and activities that integrate technology.
    b. Review and revise classroom technology agreements and guidance documents.
    c. Coordinate with the Director of Technology.

DRAFT

District Responsibilities

1. Oversight of the District Technology Program

    a. The Director of Technology will oversee, plan, and implement the initiatives listed in this document.
    b. The Director of Technology will review and approve technology use requests to ensure compliance with the Children's Internet Protection Act (CIPA), the Children's Online Privacy Protection Act (COPPA), and other applicable regulations.
    c. The Director of Technology will negotiate Data Privacy Agreements or require and direct the gathering of parent/guardian permission for students' use of technology.

2. Access to Technology

    a. Provide access to technology that enhances educational experiences and choice-ready, future-ready preparedness, including innovative tools such as generative AI.
    b. Encourage and facilitate opportunities for students and staff to actively use technology so they may practice digital media and technological fluency.
    c. Avoid unnecessarily blocking appropriate technology resources.

3. Community Engagement

    a. Seek stakeholder input, including students, staff, and community, on technology use through surveys, focus groups, etc.
    b. Gather feedback and foster collaboration between schools, families, and community partners.

4. Professional Development

    a. Provide at least one technology-related professional development session per year for staff to guide and promote responsible, ethical, collaborative, and innovative technology use.

5. Monitoring Student Use

    a. Implement appropriate measures to monitor student use of technology resources, including district-provided devices and networks, to ensure compliance with this policy and applicable laws.

DRAFT

~~Other applicable Director(s), or their designee(s),~~
~~Staff members who utilize technology regularly or are concerned about technology use,~~
~~A member of the assistive technology team or their designee,~~
~~Subject matter experts, community members, and students may also be invited to participate in the committee.~~

DRAFT

7. **First Reading *(Shaded words are new/strikethroughs are deleted)**
8. **Second Reading**
9. **Board Comments**
10. **Future Agenda Items**
11. **Key Dates**

    June 12th - Last Day for Students, Early Release 12:35
    June 13th - Teacher Work Day
    July 8th - Regular School Board Meeting
12. **Move to Executive Session**
13. **Executive Session**
    - **To consider the employment of a public officer, employee, staff member or individual agent. ORS 192.660(2)(a)**
14. **Adjournment of Executive Session**
15. **Return to Regular Session**
16. **Adjournment**