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Director of the Department of Education

TO: Co-Chair Frederick, Co-Chair McLain, & Members of the Joint Subcommittee On Ways and Means On Education

DATE: Mar 15, 2023

FROM: Kai Turner, Assistant Superintendent Office of Finance & Information Technology

RE: Question posed about Day 4 of the Oregon Department of Education's Presentation

Co-Chair Frederick, Co-Chair McLain, and Members of the Joint Subcommittee On Ways and Means Subcommittee On Education,

Thank you so much for the opportunity to provide information about Day 4 of our Presentation to the Joint Subcommittee On Ways and Means on Education. We are more than happy to continue providing information to you on our work and look forward to our continued partnership on behalf of all Oregon students. Please do not hesitate to reach out to me if you need further clarification.

With gratitude,
Kai Turner

Questions & Answers

Question:

What is the State School Fund threshold to be identified as a Small School and how many are there?

Response:

We typically see between 80 to 90 school districts that qualify for the Small School Correction weighting in the SSF. Eligibility for the Small School Correction in the State School Fund can be found under ORS 327.077. Below is the section of law pertaining to this question:

327.077 Remote small elementary school and small high school determination; effect; waiver.

(1) For purposes of this section:

(a) The "adjusted average daily membership" or "ADMa" for an elementary school is the average daily membership for the school, but no less than 25.



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(b) The “adjusted average daily membership” or “ADM_a” for a high school is the average daily membership for the school, but no less than 60.

(2)(a) A school may qualify as a remote small elementary school if the average daily membership in kindergarten through grade eight for an elementary school teaching:

(A) Nine grades is below 252.

(B) Eight grades is below 224.

(C) Seven grades is below 196.

(D) Six grades is below 168.

(E) Five grades is below 140.

(F) Four grades is below 112.

(G) Three grades is below 84.

(H) Two grades is below 56.

(I) One grade is below 28.

(b) For purposes of this subsection, kindergarten may be included in the calculation for determining the number of grades at an elementary school only if the kindergarten is full-day kindergarten.

(3) A school may qualify as a small high school if:

(a) The school is in a school district that has an ADM_w of less than 9,500; and

(b) The average daily membership in grades 9 through 12 for a high school teaching:

(A) Four grades is below 350.

(B) Three grades is below 267.

(4) An elementary school does not qualify as a remote small elementary school under subsection (2) of this section if it is within eight miles by the nearest traveled road from another elementary school in the same school district unless there are physiographic conditions that make transportation to another school not feasible.

(5)(a) If an elementary school in a school district qualifies as a remote small elementary school, the district shall have an additional amount added to the district’s ADM_w.

(b) The additional amount = {252 – (ADM_a (number of grades in the school nine))} 0.0045 ADM_a distance adjustment.

(6)(a) If a high school in a district qualifies as a small high school, the district shall have an additional amount added to the district’s ADM_w.



(b) The additional amount = {350 – (ADMa (number of grades in the school four))} 0.0029 ADMa.

(7) The distance adjustment for an elementary school = 0.025 for each 10th of a mile more than eight miles that a school is away from the nearest elementary school in the same school district measured by the nearest traveled road or 1.0, whichever is less.

(8)(a) A school may qualify as a remote small elementary school under this section only if the location of the school has not changed since January 1, 1995, and if the school qualified as a remote small school on August 2, 2011.

(b) A school may qualify as a small high school under this section only if:

(A) The location of the school has not changed since January 1, 1995;

(B) The school qualified as a small high school on July 23, 2009; and

(C) On or after October 23, 1999, and prior to July 23, 2009, the school was not part of a high school that divided or otherwise reorganized into two or more high schools in the same city.

(c) A public charter school as defined in ORS 338.005 may qualify as a remote small elementary school under this section only if the location of the school has not changed since January 1, 1995, and if the school qualified as a remote small school on August 2, 2011.

(d) A public charter school as defined in ORS 338.005 may qualify as a small high school under this section only if the location of the school has not changed since January 1, 1995, and if the school qualified as a nonchartered public remote small school on July 18, 1995.

(e) The Superintendent of Public Instruction may waive the requirements of paragraph (a), (b), (c) or (d) of this subsection if the superintendent determines that exceptional circumstances exist.

(f) An alternative education program as defined in ORS 336.615 may not qualify as a small high school under this section.

(9) The opening of a public charter school shall not disqualify a school as a remote small elementary school under subsection (4) of this section or change the distance adjustment for a school under subsection (7) of this section.

(10)(a) Notwithstanding subsections (3), (6) and (8)(b) and (d) of this section, if two high schools merge and prior to the merger at least one of the high schools qualified as a small high school under this section, the Department of Education shall continue to add an additional



amount pursuant to subsection (6) of this section to the ADMw of the school district in which the new merged high school is located that is equal to the higher of:

(A) The additional amount the school district of each of the former small high schools would have received under this section for the small high school based on the ADMA of each of the high schools prior to the merger; or

(B) In the case of a high school that remains qualified as a small high school under subsection (3) of this section after a merger, the ADMA of the merged small high school.

(b) The department shall add the additional amount under this subsection only for the first four fiscal years after the merger of the two high schools is final. If the merger of the two high schools becomes final on or before September 1, for purposes of this paragraph the merger shall be considered final in the prior fiscal year. [1995 c.649 §2; 1999 c.200 §27; 1999 c.1066 §22; 2003 c.715 §32; 2009 c.705 §§5,7; 2009 c.800 §1; 2011 c.704 §8; 2011 c.710 §§1,2; 2019 c.657 §1]

Question:

If there's a district merger, is that a net money loss? What's the policy or procedure for that change?

Response:

ORS 327.077(10) speaks to mergers. With regard to district mergers, there would need to be analysis conducted to see if there is a fiscal impact, where technically districts could merge and the eligible schools could still qualify as small/remote.

Question:

Do you have an example of how Local Option Equalization Grants are used?

Response:

The example below is a statement copied from a school district website, where they are describing how the revenues from a Local Option Bond will be used. This example can be found at the following link: <https://www.losdschools.org/Page/7358>.



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State law gives individual communities the ability to supplement state funding for their local schools, which was needed as a result of changes to statewide school funding models made in the 1990's. The first Lake Oswego School District 5-year local option levy was approved in 2000 and has been renewed four times, most recently in May, 2019. This recent renewal was approved by voters with an increase of \$0.25 per thousand of assessed value over the previous rate, for a total of \$1.64 per thousand of assessed value.

When the first local option school levy was approved in 2000, it allowed the District to add back some of the previously eliminated educational opportunities and to upgrade both instruction and program offerings. This included adding teaching positions, lowering class sizes, and providing college prep curricula and electives. The current local option levy continues to support these improvements and provides the means for the District to provide a level of program offerings, teaching positions, and class sizes that would not be possible if the District were to rely on state school support as its sole source of operating revenue.

The current Local Option Levy continues funding for more than 80 teaching, licensed, and classified positions. It also provides additional resources for new licensed staff to support advanced career/technical and STEM programs, and to provide academic and individualized social/emotional counseling supports:

Mental Health Supports

- *Added 3 elementary mental health and social-emotional learning counselors*
- *Added 4 secondary mental health/social-emotional learning counselors*

STEM/Innovation

- *Added 6 elementary STEAM/Innovation teacher; one for each elementary school makerspace*
- *Added 2 secondary STEM/Innovation teachers; to build out computer science offerings*

Reading/PE

- *Added 3 elementary reading support/learning specialists*
- *Added 1.5 PE support for elementary schools*

Safety

- *Added 1 additional school resource officer*



Local option levy funding, and all district finances and expenditures, are subject to accountability measures, including annual audits and School Board oversight, which ensure funds are used as intended.

Question:

How many districts are currently utilizing no cost school meals of SSA?

Response:

Below is a SSA Participation Summary. We list the total number of sponsors as essentially the total number of districts that operate our SSA nutrition initiatives. Under the Site Breakdown you will see the total number of schools that are operating our SSA nutrition initiatives. Essentially sites equals number of schools.

SSA Participation Summary

Total Num of Sponsors (Districts)	231		
Total Num of Sites (Schools)	1,278		
SSA Participation			
SSA Sponsors	210		
SSA Sites	1,244		
Site Breakdown			
CEP Incentive	658	Breakfast and Lunch	
Oregon EIG	465	Breakfast	
	509	Lunch	
EIG Provision 2	45	Breakfast	
	23	Lunch	
Standard Counting and Claiming	5	Breakfast	
	11	Lunch	
federal CEP	53	Breakfast and Lunch	
Not Participating	51	Breakfast	
	23	Lunch	