

## SOUTHERN OREGON ESD

# Employee Handbook

## 2018-2019



### MISSION STATEMENT

Southern Oregon Education Service District, as a responsible partner, provides services and leadership to optimize educational opportunities for the children, schools, and communities it serves.

- **We value:**

Open communication and demonstration of mutual respect.

*The necessity to continually modify programs, services, and projects to effectively accommodate changes in the educational needs of those we serve.*

- **We value:**

Responsiveness and accountability to the needs of the educational community.

*Positive interaction of staff, family, students, and community to increase the potential for learner success.*

- **We value:**

Integrity in all that we do.

*Credibility and the belief that on-going evaluation is necessary to monitor quality, goal attainment, and for informed decision-making.*

# EMPLOYEE HANDBOOK

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## **MISSION STATEMENT**

Southern Oregon Education Service District, as a responsible partner, provides services and leadership to optimize educational opportunities for the children, schools and communities it serves.

## **PURPOSE OF THE HANDBOOK**

These guidelines are "how to" steps to follow policies established by the ESD Board of Directors, in pursuit of our mission. This is the first edition combining the administrative handbook and the employee handbook.

Staff should become familiar with this document. Although it is revised annually, there may be areas that necessitate further amplification and clarification. Please discuss these with your supervisor.

## PREFACE

The material covered within this employee handbook is intended as a method of communicating to employees regarding general district information, rules and regulation and is not intended to either enlarge or diminish any Board policy, administrative regulation, or collective bargaining agreement. Material contained herein may, therefore, be superseded by such Board policy, administrative regulation, collective bargaining agreement or changes in state or federal law.

Any information contained in this employee handbook is subject to unilateral revision or elimination from time to time without notice.

No information in this document shall be viewed as an offer, expressed or implied, or as a guarantee of any employment of any duration.

Equal employment opportunity and treatment shall be practiced by the district regardless of an individual's perceived or actual race, color, national or ethnic origin, religion, sex, sexual orientation<sup>1</sup>, age, marital status, pregnancy, familial status, economic status, veterans' status, genetic information or mental or physical disability, if the employee, with or without reasonable accommodation, is able to perform the essential functions of the position.

The following staff have been designated to coordinate compliance with these legal requirements, including: Title VI, Title VII, Title IX, and other civil rights or discrimination issues; the Americans with Disabilities Act; Health Insurance Portability and Accountability Act (HIPPA); Section 504 of the Rehabilitation Act of 1973; and may be contacted at the district office for additional information and/or compliance issues:

Patty Michiels, Human Resource Manager  
Southern Oregon ESD  
101 North Grape Street  
Medford OR 97501  
(541) 776-8589

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<sup>1</sup> "Sexual orientation" is defined as an individual's actual or perceived heterosexuality, homosexuality, bisexuality, or gender identity, regardless of whether the individual's gender identity, appearance, expression, or behavior differs from that traditionally associated with the individual's sex at birth.



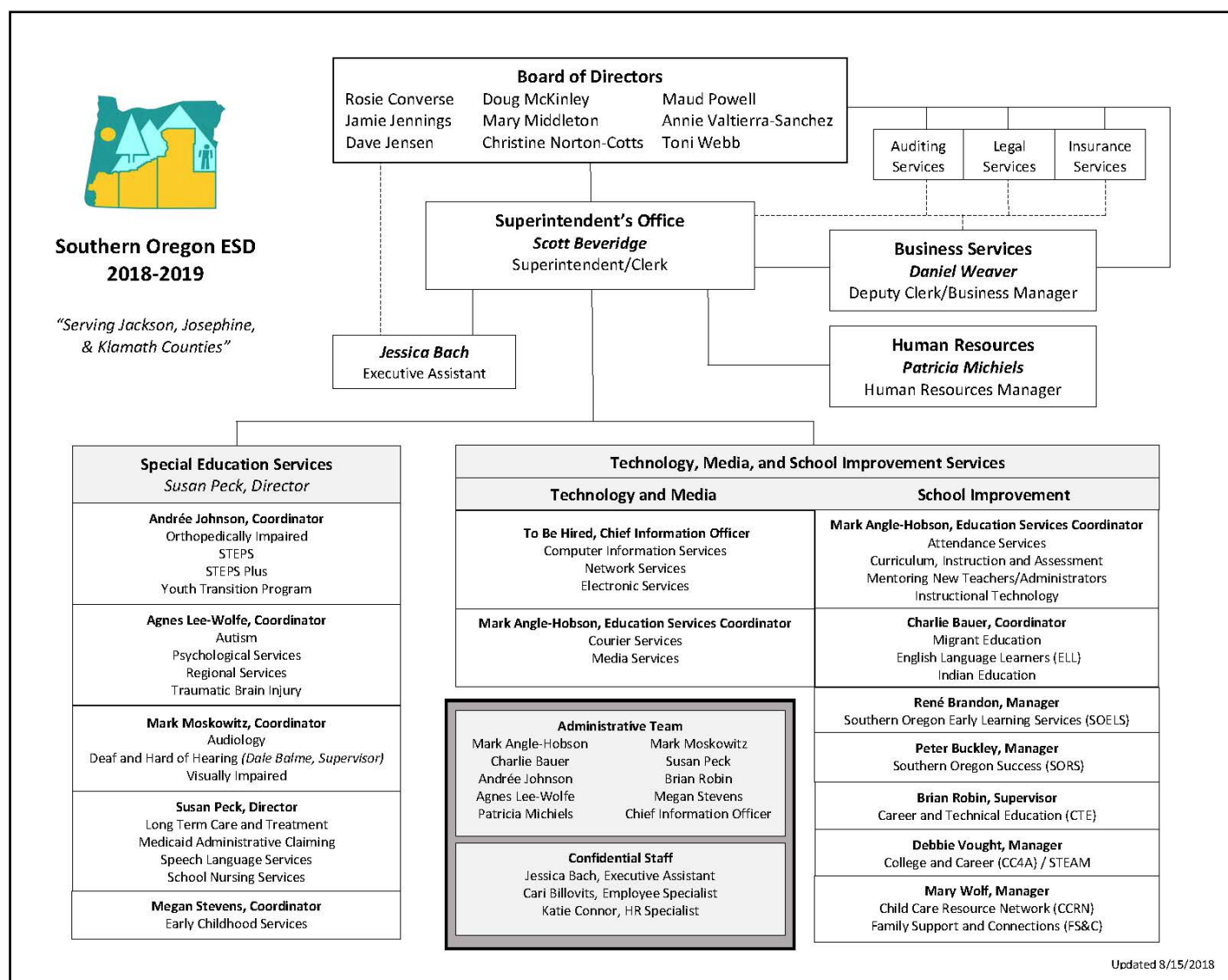
## SOUTHERN OREGON ESD OVERVIEW

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

Southern Oregon ESD is one of 19 ESDs in the state. It serves 13 school districts, over 100 buildings, 3,500 teachers and 49,000 students in Jackson, Josephine and Klamath counties. Southern Oregon ESD's 10,600 square mile geographic area represents the largest ESD service area in the state and ranks fifth highest in the state with respect to student population.

Governed by a nine-member Board of Directors and staffed by approximately 325 employees, our agency brings the cooperative benefits of "The Regional Advantage" to every student, teacher, administrator and resident of our service area every day.

## ORGANIZATIONAL CHART



## **EMERGENCY SCHOOL CLOSURE**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

School-based staff will follow the closure for the district to which they are assigned. Employees who serve multiple districts will follow closure of the districts they were scheduled to serve on that day. Emergency closures for office-based staff in Grants Pass Regional Programs and Klamath Falls offices will follow the closure or delayed start schedules of the school districts in which their offices are located. If there is an emergency specific to an SOESD building, staff will be notified.

NOTE: For the Medford, Phoenix and Gilbert Creek ECS offices only, the SOESD superintendent will make the decision after consulting with the program administrators located in these offices, whether or not to close the Medford, Phoenix and/or Gilbert Creek ECS office/s. A closure in SOESD offices affects only employees assigned to these offices who are not assigned to follow a district calendar.\* The emergency phone tree will be used to contact employees and SOESD Computer Information Services will continue to post closures on the SOESD website.

\*For those employees assigned to follow a school district calendar, at the beginning of each school year, the program administrator will establish with the employee what to do in the event of an office closure that affects the employee's work calendar.

If there are all-day closures due to weather, water contamination, electrical outages or other conditions, those days are considered non-work days and may be made up at the end of the school year at the discretion of the Superintendent and/or component districts.

Employees may utilize appropriate paid leave for weather conditions if they deem it too hazardous to get to work or if they determine it is too hazardous to return to work from the field. If an employee has reported to work and is driving to serve a district and in their judgment finds the conditions too hazardous, they may return to their office site without taking their leave. This situation will be considered within the scope of work. Because of insurance liability, we cannot sanction employees working from home on closure days. Employees will not be required to utilize available personal leave for delayed start or early dismissal emergency closures.

For school closure information check the SOESD and school district websites or, tune into the following stations: Radio Stations: Radio Medford (KAKT, KBOY, KCMX, KTMT); Bi-Coastal Media, Inc. (KMED, KOOL, KRWQ, KISS, KZZE); Jefferson Public Radio (KSOR); KDOV; Opus Broadcasting (KROG, KCNA, KEZX, KRTA); KAJO/KLDR; KRRM. Television Stations: KDRV, KOBI, KTVL, KMOV (KOBI).

## **ACCIDENT REPORTING**

Contact: Business Office– (541) 776-8580 ext. 1108

Employee Accidents – Employees are to report all accidents to the immediate supervisor. If the accident involves personal injury and necessitates medical intervention, employees are to contact Human Resources as soon as possible, but no later than 72 hours from the time of injury to file a Worker's Compensation claim. If the employee is incapacitated, the immediate supervisor or designee is required to contact Human Resources on behalf of the employee to complete the necessary report. If a motor vehicle is involved in the accident, the business manager is to be contacted immediately.

Student Accidents – All student accidents are to be reported within 24 hours of the time of the incident. A copy of the written student incident report is to be forwarded to the SOESD business manager.

## **MASTER SCHOOL CALENDAR**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

The superintendent's office develops a master school calendar after input from the 13 school districts in the ESD's three-county service area.

## **INFORMATION REQUESTS**

Contact: Superintendent's Office– (541) 776-8590 ext. 1116

The administration office has a copy of the guidelines regarding access to information, both public and confidential.

## **RELEASE OF GENERAL STAFF INFORMATION**

Contact: Human Resources – (541) 776-8590 ext. 1184

A staff member's or volunteer's address, personal electronic mail address, date of birth, social security number and personal phone number contained in personnel records maintained by the district are exempt from public disclosure. Such information will be released by the district only upon written permission of the staff member or volunteer, unless otherwise accepted by law.

Authorized SOESD personnel may disclose information about a former employee's job performance to a prospective employer under the following conditions:

1. Disclosure of information is upon the request of the prospective employer;
2. Disclosure of information is upon the request of the former staff member;
3. The information is related to job performance; or
4. The disclosure is presumed to be in good faith.

The district will not disclose information that is knowingly false deliberately misleading, or rendered with malicious purpose.

## **POLICIES AND RULES**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

Board Policies are available on the district website. Copies of these documents are also housed in the staff rooms of the Medford, Grants Pass, Klamath Falls and Phoenix locations.

## **PARKING**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

Employees who work at the Medford or Phoenix site are to park in their assigned parking spot. Employees assigned to the Klamath Falls office are to park in the ESD designated parking spaces only. Employees at the Early Childhood Services site in Grants Pass are to park on the street or in the hospital parking lot, except on Mondays, when the Gilbert Creek lot is available.

## **ESD COURIER**

Contact – (541) 776-8590 ext. 1181

The ESD Technology and Media Services provides courier services during the school year to ESD and school buildings in Jackson, Josephine and Klamath counties directly or in partnership with district delivery services. A schedule of delivery times is printed and distributed each fall. ) The courier schedule is posted on the SOESD website. Updated courier information is posted to the website throughout the year. During summer months, courier delivery is not available. NOTE – To ensure delivery of courier mail, please use the following format for addressing courier mail:

Recipient's District Name  
Recipient's School/Building Name  
Recipient's First and Last Name  
Sender's First and Last Name  
Sender's Building Name

Some schools do not receive daily delivery; therefore, you should consult a courier schedule to determine the time needed to have an item delivered. Only official school correspondence is allowed; no personal material. A more detailed policy is available from Technology and Media Services.

**ESD MAIL**

Contact: Instructional Materials Specialist – (541) 776-8590 ext. 1134

All ESD mail is processed in the media library (Medford office). The deadline for outgoing mail to be in the media library is 2:30 pm. Any large mailings (more than 50 pieces) need to be in the media library by noon of the day it is to be mailed. All items must be properly labeled and identified by department in the left-hand corner. Certified letters will continue to be metered by the media library; however, it will be the responsibility of the department sending the certified mail to take those letters to the post office to get the required certified mail stamp from the post office. Any envelopes 6" x 9" or larger must be sealed. Smaller envelopes can be sealed by the media library.

**BUILDING MAINTENANCE**

Contact: Business Manager – (541) 776-8590 ext. 1121

If you have concerns, needs, or complaints about ESD buildings, contact the ESD business manager.

**CLASSROOM MAINTENANCE**

Contact: Special Education Director – (541) 776-8590 ext. 3187

Classroom needs, concerns, or complaints should be referred to the special education director.

## PERSONNEL (Policy 3200/4200)

### CATEGORIES OF PERSONNEL (POLICY 3100/4100)

#### Licensed/Classified – Temporary/Substitute Definitions

**Temporary:** Hired as an addition to regular staff to fill a particular need for a defined period of more than 30 days or is hired to replace a regular employee for an extended and usually unpaid leave of absence. (These positions must be posted if over 30 calendar days.) A temporary employee working in a classified position is defined as an employee hired for a period of less than six (6) months. See employment period defined below for both licensed and classified.

**Substitute:** Hired to work in lieu of a regular employee taking paid leave time: sick leave, bereavement leave, personal leave, etc. (See employment period defined below for both licensed and classified.)

LICENSED PERSONNEL		
CATEGORY	TIME EMPLOYED	BENEFITS
Teachers/Specialists	Full time/part time contracted by SOESD board	Covered by collective bargaining agreement
	Temporary/substitutes	One hour of sick time is earned for every 30 hours worked.

CLASSIFIED PERSONNEL		
CATEGORY	TIME EMPLOYED	BENEFITS
Regular	One-half time or more, hired for more than six months	Covered by collective bargaining agreements
Part Time	Less than half-time	Not covered by collective bargaining agreement. Sick time is earned on a pro-rated basis. One hour of sick time earned for every 30 hours worked. No other leave is earned; no insurance coverage
Temporary/Substitutes	Less than six months	One hour of sick time is earned for every 30 hours worked.

## **SALARY PLACEMENT**

Contact: Human Resources – (541) 776-8590 ext. 1184

### **LICENSED AND CLASSIFIED**

1. When hiring part-time/temporary employees, the program administrator will complete the appropriate (classified or licensed) New Hire Checklist and forward the completed packet to the appropriate administrator. .
2. If a part-time/temporary employee works through the end of an academic year and is hired again at the beginning of the subsequent academic year, the administrator must submit a payroll change notice, indicating the individual receives the percentage increase negotiated per the appropriate collective bargaining agreement.

### **LICENSED**

1. Substitutes - Rate of pay determined by state regulation.
2. Contracted Employees - Rate of pay published in collective bargaining agreement.
3. Regular Time Sheet Employee - Rate of pay determined by using existing salary schedule that encompasses education and experience.
4. Temporary Time Sheet Employee - Daily rate of pay is 1/190 of salary schedule base. (Employee hired for a short period of time for a specific purpose, such as Supported Ed.)
5. Summer Work - ESD teachers working in the summer, under the same job description they worked during the school year, will receive their regular rate of pay.
6. If there is no existing position description for a proposed part-time/temporary licensed position, a draft job description will be written and submitted to the superintendent for review.
7. Appeal of original placement must be requested within one year of hire date.

### **CLASSIFIED**

1. Newly-hired classified employees may be placed above step five on the salary schedule if the employee has more than five years of pertinent experience and at least one of the two following conditions is present:
  - a. Position is difficult to fill due to the required qualifications. (Difficult to fill may be defined as very few applications received.)
  - b. There is a need to be more competitive with the salaries of other agencies (private, public, non-profit, etc.)
2. Appeal of original placement must be requested within one year of hire date.
3. Substitutes - Paid on appropriate job level code, step one.
4. Part-Time/Temporary - Paid on appropriate job level code, step to be determined by experience with placement not to exceed step five.
5. If a position description is needed for part-time/temporary work for which there is no existing job description, a job description will be written and submitted to the superintendent. The code will be determined through the bargaining process.
6. When employees are assigned to a higher code, per review by the code committee and the Superintendent's approval, they will be placed on the salary schedule at a step which provides a salary at least one step higher than provided by the employee's prior code and step.

7. When employees are involuntarily transferred to a lower code on the salary schedule they will be paid at the rate provided in the lower code but at the same step as previously held. (This does not apply to reduction in force.)
8. When an employee applies for and is successful in acquiring a position in a different job category, the rate of pay (salary schedule step) will be determined based on the experience of the employee relative to the new position. The employee will begin work in the new position as soon as reasonably possible, taking into consideration the required time for posting the position, interview timeline, notice required by new employee's former employer and training of replacement.

### **LICENSURE**

Contact: Human Resources Office – (541) 776-8590 ext. 1184

TSPC licensed employees are responsible for furnishing directly to the Teacher Standards and Practices Commission any license renewal application and payment, as well as any other required documentation (i.e. transcripts if applicable). The District will complete and forward directly to TSPC a Professional Educational Experience Report (PEER) form, after verifying that the employee and supervising administrator have reviewed continuing Professional Development Units (PDUs) and the appropriate number of PDUs have been documented for TSPC license renewal. A copy of the completed PEER form is provided to the TSPC licensed employee and a copy placed in the employee's personnel file.

For all other employees not holding TSPC licenses, it is the responsibility of the licensed employee to register with the SOESD superintendent's office, the original license or ODE authorization.

Failure to hold a valid license or ODE reauthorization automatically terminates employment, since the requirement of licensure is mandated by state law and/or SOESD Board Policy.

If a second license or certificate is requested by the ESD, the cost of that license or certificate will be reimbursed to the employee (per SOBC contract, Article XX, I, (5)).



## **LETTERS OF INTENT**

Contact: Human Resources – (541) 776-8590 ext. 1184

<b>Licensed Timelines</b>	
District provides written notice to the licensed employee of renewal or non-renewal.	By March 15
Licensed employee accepts or rejects the offer of renewal.	By April 15
District provides written notice of assignment for following year (specific if known or a statement indicating it is not yet known)	Prior to the last working day of the school year.

<b>Classified Timelines</b>	
Academic Year employees return "Intent to Return" form to Human Resources	By May 15
Academic Year employees apply by letter to program administrator for available summer openings.	By May 15

## **EXPECTATIONS OF EMPLOYEES IN THE WORKPLACE**

Contact: Human Resources Office – (541) 776-8590 ext. 1184

### **Employee Conduct**

The following are SOESD expectations:

#### **Attendance and Punctuality**

The employee is consistently on time, adheres to the daily time schedule (arrives at work on time and leaves at the appropriate time), has regular attendance at work and work activities, and is punctual in meeting deadlines, attending meetings, and following schedules. The employee uses established procedures for requesting leave and leave requests are consistent with appropriate and allowable use of leaves. For extended absence due to medical condition, the employee uses established procedures for applying for FMLA and/or OFLA and provides documentation of a serious health condition. If the employee is absent and a substitute is required, the employee reports the absence by 6:00 a.m. to the absence management system. If no substitute is required, the employee notifies the appropriate supervisor of his/her absence. The employee submits absence reports in a timely manner to appropriate personnel.

#### **Confidentiality**

The employee maintains the integrity of confidential information relating to a student, family, colleague, or district patrons. The employee uses or relays personal information only in the course of performing assigned responsibilities and in the best interest of the individuals involved.

### **Following Policies and Directives**

The employee follows all state, SOESD, district and school policies, rules, regulations, memos, bulletins, announcements, applicable job position descriptions, and reasonable requests by proper authority. The employee performs job-related tasks as designated by supervisor. Special education employees are also required to implement all required special education procedures including parent rights, eligibility, IEP placement, discipline, and student records according to stated timelines. The employee prepares and maintains classroom materials, equipment, telephone contact log and specific substitute instructions.

### **Gifts**

Per Board Policy 8600, employees shall not accept gifts from students, parents, vendors or outside individuals and any solicitations of employees and/or students shall be authorized only by the superintendent. The SOESD Board considers cards, letters, and plaques as acceptable tokens of gratitude or appreciation.

### **Personal Appearance**

The employee is dressed and groomed in a neat, clean, and proper professional manner for the assignment and work setting. Attire will be modest, unrevealing, safe and commensurate with job duties. During summer hours, based on work location and conditions, more casual attire is allowed with superintendent approval.

### **Physical Requirements and Safety**

The employee performs physical requirements unaided or with the assistance of reasonable accommodation. The employee will maintain a safe working, teaching, and learning environment. The employee who interacts with students will implement safe teaching practices, use only proper equipment/materials (reflective of age, grade level, and content area) and follow classroom rules/supervision that promote safe conduct.

### **Professional Conduct and Communication**

The employee uses respectful, friendly, clear and win/win oriented professional communication skills and behavior with other employees, students and families. The employee demonstrates positive support for the school district, the SOESD, and the community and serves as a liaison to promote good public relations between SOESD, staff, families, component districts and the community. The employee accepts constructive feedback, shows ability to be flexible in the workplace, gets along and works well with the educational team. The employee avoids relationships or activities that have the potential to interfere with professional judgment and objectivity or blur the boundaries of professional relationships. If there is a conflict of interest with an employee, student, or family, the employee is to inform the program administrator of the conflict of interest. Proper internet use, which does not violate computer use agreement, will be followed. SOESD protocol, procedure, and policy will be followed when communicating complaints and concerns. Use of personal cell phones for personal calls during the work day should be limited to break periods or personal emergencies. The employee demonstrates ethical standards related to his/her professional practice and follows SOESD and/or district policy. For example, ASHA Code of

Ethics, CEC Special Education Professional Ethical Principles and Practice Standards, DEC Code of Ethics, NASP Standards, NAEYC Code of Ethics, TSPC Statement of Professionalism.

### **Professional Growth**

The employee participates in activities that are considered to be professionally enhancing and connected to respective job descriptions/duties. The employee is self-motivated and takes initiative. The employee completes an Employee Request to Attend Inservice form and submits the request to the program administrator for approval. An agenda for the workshop or conference should be attached for review by the administrator. (See Attachment A-8)

### **Solicitations**

Per Board Policy 8400, solicitations of employees and/or students shall be authorized only by the superintendent. The following is meant as a guideline when these situations come up.

#### **Fund Raisers and Direct or E-mail Solicitation of ESD Employees**

Questions periodically come up related to fund raisers, and direct or e-mail solicitation of employees for financial contributions of one kind or another. It is hoped that the following guidance will be useful as such issues arise in the future.

Under Oregon law all ESD employees are considered "public officials." ORS 244.040 outlines the following guidance relative to "public officials":

1. Public officials may not use or attempt to use their official position or office to obtain a personal financial gain or to avoid a personal financial detriment if the opportunity would not otherwise be available but for their holding the official position or office.
2. Public officials may not use or attempt to use their official position or office to obtain a financial gain or to avoid a financial detriment for a public official's relative if the opportunity would not otherwise be available but for their holding the official position or office.
3. Public officials may not use or attempt to use their official position or office to obtain financial gain or to avoid a financial detriment for a member of the public official's household if the opportunity would not otherwise be available but for their holding the official position or office.
4. Public officials may not use or attempt to use their official position or office to obtain financial gain or to avoid a financial detriment for a business with which the public official, relative of the public official or member of the public official's household are associated if the opportunity would not otherwise be available but for their holding their official position or office.

***The following set of questions and answers relative to Southern Oregon ESD has been developed in light of ORS 244.040 and related guidance published by the Oregon Ethics Commission (see Oregon Government Ethics Law: A Guide for Public Officials, 2008).***

1. **Can I bring items to the ESD and sell them to my fellow ESD employees, or employees of the schools we serve, for the profit of me, my friends, or members of**

**my family or household?**

No. Access to fellow employees at the work place is an opportunity that would not otherwise be available but for your holding of your “official position” as an ESD employee (see ORS 244.040 summary above).

- 2. Can I advertise goods or services to my fellow ESD employees or employees of the schools we serve that, if purchased, will profit me, my friends, or members of my family or household?**

Again, no – for the same reasons outlined in question #1.

- 3. My child is participating in a fund raiser for school, church or some other community organization. Can he/she come to the ESD and sell items or solicit donations?**

It is not appropriate to bring children to work to directly solicit donations from staff or for employees to go about the ESD directly soliciting such donations. However, it may be permissible to have donation materials available either visible at the staff member’s work space or in the staff room if a) the fund raising activity is clearly for a cause that benefits children in the community, and b) if the material has been reviewed and initialed by the superintendent.

- 4. Can I use ESD e-mail or other ESD resources (copy machines, phones, courier, etc.) to advertise an event, product or service (garage sale, sale of items, sale of services, etc.) that could bring profit to me, my friends, or members of my family or household?**

No, for reasons outlined in question #1.

- 5. Can I use ESD e-mail or post a flyer on the ESD staff room bulletin board to advertise an event, product or service that could bring profit to benefit students in an ESD-operated program?**

Yes, in some circumstances with direct superintendent approval.

- 6. Can I use the ESD courier or other ESD resources (copy machines, telephones, etc.) to advertise an event, product or service that could bring profit to benefit students in an ESD-operated program?**

Yes, in some circumstances with direct superintendent approval.

- 7. Can ESD e-mail or other ESD resources (copy machines, telephones, courier, etc.) be used to solicit financial or other assistance to a fellow ESD employee in need of such assistance?**

Typically, ESD e-mail and other resources would not be used for a purpose such as this as a protection of ESD employee privacy. Some rare circumstances could occur where limited e-mail notification could be allowed with superintendent approval.

### **Training**

All SOESD employees will complete the following mandatory training annually by October 1 of each year: sexual harassment, sexual conduct, child abuse identification and prevention, bloodborne pathogens, hazardous communications, student privacy rights (FERPA), bullying prevention, sexual misconduct, getting a MSDS, pest management, CIPA – media literacy and digital safety, and computer, network, and Internet Use Agreement.

### **Use of Tobacco in the Workplace**

(See SOESD Board Policy 3430/ 4430 SOUTHERN OREGON ESD IS A TOBACCO-FREE ORGANIZATION)

In order to comply with state and federal laws and to protect the health of students, staff, and the general public, provide a healthy working environment and promote good health for students, tobacco and inhalant delivery systems use shall be prohibited on all District property and in District-owned vehicles.

## **WORK DAY EXPECTATIONS**

### **Absence Reports**

Refer to association contracts for types of leave and information required. The Human Resources Office may be contacted if administrators have any questions on appropriateness of requests. Employees are expected to notify their immediate supervisor if they will be absent from work, regardless of whether or not a substitute is needed. Absence reports must be submitted to the administrator prior to any planned absence or immediately following any unplanned absence. An absence report must be completed for duty time when outside the three-county area (five-county for regional staff). (See Attachment A-1)

The program administrator will:

1. Review, on a case-by-case basis, absences that exceed available paid leave.
2. If a long-term pattern of absences, discuss with the employee:
  - a. that absences are causing disruption in completing work (document the disruption);
  - b. any ADA issues or possible FMLA/OFLA eligibility;
  - c. that if pattern continues employee could be subject to discipline;
  - d. scheduling an absence review in two months.
3. If continued pattern of absences, discipline up to and including termination.

The program Administrative Assistant will:

1. Record daily absences as called to the program office.
2. Monitor absence reports weekly.
3. Complete an Absence Report for any employee who was absent the previous week and has not submitted a report.

4. Forward all absence reports to the program administrator, marking those not completed by the employee.

The program administrator will:

1. Sign and forward copies of the absence report: white-Human Resources; yellow-employee; pink-administrator.
2. Track those employees who do not submit absence reports.
3. Take disciplinary action if needed.

Responses to frequently asked questions regarding leaves:

1. Medical and dental office visits may be counted as personal or sick leave.
2. Sick leave may be used in connection with illness in the immediate family.
3. Military leave will be granted in accordance with state and federal law. If a request is received, the administrator will contact the superintendent.

#### **Association Leave**

Licensed Staff: See SOBC contract, Article 5, Section C

Classified Staff: See OSEA collective bargaining agreement, Article 7, Section 7.2.

If an employee desires to use association leave, the request is to be submitted on an absence report to the appropriate administrator; if the request is approved, the administrator will sign the absence report and forward it to the ESD superintendent.

#### **Bloodborne Pathogen Training**

All employees are to receive initial bloodborne pathogen training and annual training thereafter. Employees in at-risk positions for bloodborne pathogen exposure are to complete the appropriate paperwork for vaccinations or waiver of vaccinations and forward this paperwork to the program Administrative Assistant who forwards the information to the Human Resources office. Employees are to follow timelines for vaccinations and notify the superintendent's office of each vaccination received. ESD administration will ensure that employees follow timelines and notification procedures and that necessary disciplinary action is taken when needed.

#### **Classified Lunch**

Educational assistants working six (6) hours or more a day, receive a 30 minute paid lunch period, during which duties may be assigned as required by (OAR 839-20-0050). Other classified generally have a duty-free, non-paid lunch period as arranged by their supervisor. By law, if the work period is at least six hours but less than seven hours, the meal period is to be taken between the second and fifth hour worked. If the work period is more than seven hours, the meal period is to be taken between the third and sixth hour worked.

#### **Classified Breaks**

A 15-minute break will be provided at approximately midpoint of each four hours worked. Breaks may not be saved and taken with the lunch period or at the end of the day.

#### **Licensed Lunch**

At the minimum, licensed employees receive a 30 minute, continuous, duty-free lunch period

during the regularly scheduled lunch hours as required by (ORS 342.608).

### **Mother Friendly Workplace**

State and federal law requires employers to provide accommodations for their employees who are breastfeeding.

Oregon Wage and Hour Law, Employee Rest Periods for Expression of Breast Milk, includes the following requirements:

- Employers need to provide time and a private space for nursing mothers to express breast milk for their child. The space cannot be a toilet stall or restroom.
- Employers need to provide reasonable break time for an employee to express breast milk for her nursing child, each time the employee has the need to express the milk.
- Breastfeeding mothers need to give their employers reasonable advance notice that they need these accommodations when they return to work.

In accordance with Oregon and Federal laws, Southern Oregon ESD will comply with these laws as outlined below:

1. Breastfeeding employees shall be allowed a flexible schedule for nursing or pumping. The time allowed will not exceed the normal time allowed for lunch and breaks. For time above and beyond normal lunch and breaks, appropriate leave will be used or the employee can choose to flex the workday to either come in earlier, leave later or take a shorter lunch. Employees are to confer with their supervisor regarding flexing the workday and time schedule.
2. A private room (not a toilet stall or restroom) will be available for employees to breastfeed their child or express milk using a breast pump. The room will have accessible electrical outlets for an electric breast pump and a sink close by for hand washing and rinsing out breast pump parts.
3. Storing breastmilk:  
A refrigerator will be available for safe storage of breastmilk. Breastfeeding women will provide their own containers and milk stored in the refrigerator will be clearly labeled with name and date.  
**—or—**  
If a refrigerator is not available, mothers can bring in a small ice chest for storing breastmilk.
4. All employees will be informed of this practice.

### **Time Sheets**

If employees are employed on a time sheet basis, Administrators are to hold employees responsible for recording on a daily basis the hours worked, and for submitting the time sheet to the administrator on the agreed date for approval. The administrator then is responsible for submitting the time sheet to Human Resources by the cut-off date.

### **Work Hours**

Work hours are determined by the program administrator.

### **Working from Home**

With prior approval from his/her supervisor a licensed bargaining unit member may request to work from home up to three (3) times a year not to exceed eight (8) hours in a day. This is not an option which can be used during inclement weather. If there is a need to work from home beyond the time outlined above, the supervisor may submit a request to the Superintendent for approval.

The agency does not encourage working from home. Any request to work from home from non-licensed bargaining unit members must be preapproved by the superintendent who has sole authority to grant or deny these requests.

### **CHILDREN IN THE WORKPLACE**

Infrequent visits by an employee's child, which are of brief duration and are not disruptive to other employees, are permitted. The child must either stay by the parent's side or be in or near the parent's work space at all times – not in the hallways or in other people's offices. The parent/employee is solely responsible for the child's behavior at all times.

### **EMPLOYEE/STUDENT/FAMILY RELATIONSHIPS**

Employees are to maintain proper and professional relationships with students/families and refrain from exploiting professional relationships for personal gain, or in support of persons or issues. Some examples of impropriety are: solicitation of items and services between staff and students/families; inappropriate sexual relationship with a student's family member; using work contact to establish personal outside business.

- Employees shall maintain the dignity of the education profession by respecting and obeying the law and exemplifying personal integrity and honesty.
- Employees are not to demonstrate or express improper interest in a student's personal life.
- Employees shall not engage in any sexual contact with a student.
- Employees shall not engage in any form of harassment, including sexual harassment, racial harassment, religious harassment, ethnic harassment or any other form of harassment of a student.
- Employees are not to accept, give or exchange gifts or notes with students.
- Employees are to report to their supervisor, if they believe a student is becoming romantically attached or involved with them.
- All complaints of improper or unprofessional conduct against an employee, with respect to that employee's relationship with a student, shall be investigated by the administrator.

Note: Any activities by employees which occur beyond the scope and hours/days of employment are as a private individual, and the Southern Oregon ESD has no responsibility for the employee's actions.



## **EVALUATION**

Contact: Human Resources Dept. – (541) 776-8590 ext. 1184

### **Evaluation of Performance**

Classified	Classified employees shall be evaluated at least biennially.
Licensed	See the <b><i>Teacher and Administrator Evaluation and Support System Employee Guide</i></b> posted on the SOESD website.
Classified and Licensed	All evaluations are to be conducted by the appropriate administrator. After he/she reviews the evaluation, the administrator will forward the evaluation to the Human Resources Office to be placed in the employee's personnel file. All evaluations will include an evaluation summary. All employee evaluations are to be signed by the appropriate administrator and the employee.

### **Programs of Assistance for Improvement**

Classified	See Article 13 of OSEA Chapter 104 Bargaining Agreement.
Licensed	See the <b><i>Teacher and Administrator Evaluation and Support System Employee Guide</i></b> posted on the SOESD website.
Classified and Licensed	<p>When an administrator determines that a program of assistance is needed for improvement in order to develop a skill set necessary to perform a job, a meeting with the superintendent is scheduled to review initial data and concerns, prepare a program of assistance for improvement, and design the data collection process. The program of assistance is not intended for correcting behavior.</p> <p>Programs of assistance for improvement will be developed according to evaluation guidelines, collective bargaining agreements, and statutes. Review of the program and accompanying data may require consultation with the district's legal counsel.</p> <p>Programs of assistance for improvement must be signed by both the employee and administrator with the original filed in the employee's personnel file located in the ESD Human Resources office.</p>

## **TERMINATION OF EMPLOYMENT (POLICIES 3700/4700; 3900)**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

### **Check-Out Process**

#### Employee's Check List

- ☐ Required reports have been completed
- ☐ Equipment has been turned in
- ☐ Keys and name badge have been turned in

### **Resignation**

Licensed - Letter of resignation is written to the superintendent who responds in writing with copies of his response to the Administrator, who prepares a payroll change notice.

Resignations must be given with at least 60 days' notice. *Failure of the employee to provide proper notice may result in a request by the Board to have the employee's license suspended.*

Classified - Letter of resignation is written to the administrator, who responds in writing, prepares a payroll change notice, and then routes the letter of resignation and payroll change notice to the Business Office. *Proper notice is defined as 10 working days.*

### **Retirement Timeline**

#### One year prior to retirement:

- ☐ Carefully read the applicable collective bargaining agreement regarding eligibility for retirement benefits: Article 25 from the collective bargaining agreement with SOBC for licensed employees, and Article 19 from the collective bargaining agreement with OSEA Chapter 104 for classified employees.
- ☐ Obtain a "Benefit Estimate" from PERS/OPSRP. The "Estimate Request" form can be obtained on the PERS web site ([www.oregon.gov/PERS](http://www.oregon.gov/PERS)).
- ☐ It is recommended that you attend a PERS "one year to retirement" group counseling session. Refer to PERS web site for dates and times.
- ☐ Schedule an appointment with SOESD's employee specialist to discuss: your cost for insurance premiums; insurance benefits you will receive from SOESD; possible conversion of your life insurance; and how your sick leave balance at time of retirement may affect your retirement benefit.

#### Six months to one year prior to retirement:

- ☐ Read the PERS "Preretirement Guide," which can be obtained on the PERS web site. If you have questions about information in the guide, contact PERS Customer Service at 1.888.320.7377.
- ☐ Acquire "Retirement Packet" from PERS, which can be obtained on the PERS web site.

#### Two to three months prior to retirement:

- ☐ Submit completed "Retirement Packet" to PERS. If mailing, send via certified mail to:  
PERS  
P.O. Box 23700

- ☐ Submit a letter of retirement to the appropriate administrator (superintendent for licensed, program administrator for classified) no later than two months prior to your retirement date. (This should be done no later than the date you submit completed "Retirement Packet" to PERS.) If you wish to retire and continue working, you must state that request in your retirement letter along with the date you wish to retire and the date you wish to leave employment. Example: Retire September 1, 2016 and continue working through December 31, 2016.\*
- ☐ Schedule an appointment with the employee specialist to discuss: absence reports, payoff of accrued vacation, possible legislative changes that may affect your retirement, and calculations of your final paycheck (403b deductions, dues, Section 125 deductions, automatic deposit, employee paid insurance, etc.).

***Please note: You are not entitled to be paid for unused sick leave. Your sick leave balance at time of retirement will be submitted to PERS. PERS will calculate your final retirement benefit applying unused sick leave to the calculation to determine what is most advantageous for you. You are not entitled to be paid for unused personal, emergency or bereavement leave. If you are in a position that accrues vacation, you will be paid for unused vacation.***

#### **\*Continued Employment**

Decisions to retain an individual in his/her current position will be made by the superintendent.

An employee who has retired and left district employment may apply for a subsequent vacancy with the district under the same application and interview procedures as all other applicants for employment with the Southern Oregon ESD.

#### **Flagrant or Serious Violation**

A flagrant violation of rule, policy, law, or directive is an example of a substantive deficiency that could result in immediate termination without a plan of assistance according to procedures outlined in evaluation guidelines and the classified contract.

#### **Exit Interview**

An exit interview will be granted to each employee who resigns from Southern Oregon ESD. The following guidelines are to be utilized:

- The exit interview will be conducted by an administrator other than the employee's immediate supervisor.
- A standard list of questions will be asked by the administrator.
- Time will be allotted in the interview for the administrator to listen to comments from the employee.
- The administrator will take brief notes which will be forwarded to the HR Manager

## **BENEFITS/LEAVES (POLICIES 2300; 3500/4500)**

Contact: Human Resources – (541) 776-8590 ext. 1184

### **Employee Assistance Program (EAP)**

Southern Oregon ESD provides an Employee Assistance Program (EAP) for its employees. This program provides services to help employees privately resolve problems that may interfere with work, family, and other important areas of life. Employees can access more information about SOESD's EAP by calling 1-866-750-1327, or visiting [www.MyRBH.com](http://www.MyRBH.com), Access Code: OEGB.

### **Health Insurance**

Insurance benefits are stipulated in the collective bargaining agreements for classified and licensed employees and in the individual contracts of administrative and confidential employees. Benefits typically include: Full family medical, dental, and vision; term life insurance; long term disability; retirement; Section 125 cafeteria plan; accident insurance; tax sheltered annuity.

Information on the actual coverage of these plans is available by contacting Human Resources (541-858-6721) or at [www.soesd.k12.or.us](http://www.soesd.k12.or.us).

Employees have thirty-one days after marriage, birth, adoption, etc. to add dependents to the insurance coverage provided by the ESD. If changes are not made within the thirty-one days allowed by the insurance companies, the additions cannot be made until open enrollment.

Should an employee or a spouse of an employee lose coverage for any reason (termination for any reason, divorce, etc.), eligibility may continue under the ESD for a period of time. If changes should occur that might influence an employee's eligibility, that employee should contact Human Resources to see what eligibility remains, and for what period of time.

### **Public Employees Retirement Systems (PERS)**

#### **Retirement Programs**

Because of changes in PERS, employees hired on or after August 29, 2003 will be covered under Oregon Public Service Retirement Plan (OPSRP). For current employees hired before August 29, 2003, contributions are made to an individual account program (IAP).

Should an employee, who is hired prior to August 29, 2003, die prior to retirement, the beneficiary receives double the amount that is in the employee's PERS account.

#### **PERS Break in Service for Tier 1 and Tier 2 Members**

Employees hired before August 29, 2003 have established membership in PERS. To retain PERS status, employees must work a minimum of 600 hours per year and must not have a break-in-service of more than six months' duration unless exempted (i.e. family medical, professional development, active military duty).

### **Social Security**

All ESD employees are covered under Social Security.

### **Tax Sheltered Annuities – 403(b)**

SOESD makes available to all permanent staff and any substitute or temporary employee (who average 20 hours or more per week for a calendar year) the ability to participate in a 403(b) Tax Sheltered Annuity program. This is a salary reduction program where the employee determines the amount that they will contribute and that amount is taken out of their monthly salary. Employees interested in participating must contact the SOESD Human Resources office for more information and to obtain a list of participating companies.

### **Worker's Compensation**

All employees are covered under a Worker's Compensation plan. This plan covers employees who are injured in the course of their work. Should an injury occur, employees must notify the Human Resources office as soon as possible and complete the necessary incident report. If medical attention is required, the appropriate worker's compensation claim forms must be completed by the employee and forwarded to the Human Resources office within 72 hours of seeking medical attention.

If an injury is serious enough to require hospital care, the administrator is responsible for notifying the ESD Superintendent's/Business Office immediately. The Human Resources office then must notify the carrier immediately upon receipt of the information. Future claims may depend upon timely filing of accident reports.

## **Paid Leaves**

<b>Classified</b> <b>(Oregon School Employees Association – Article 7.2 and Article 8)</b>	
Discretionary Leave	<p>Three days maximum, *one-hour portions. Must be employed at least three months. One (1) unused day of Discretionary Leave may be carried over from one year to the next for a maximum of four (4) days total in a contract year. All limitations have been removed.</p> <p>*Discretionary leave may be used in one-half hour portions when the half-hour is in conjunction with the use of one or more hours.</p> <p style="text-align: center;">Acceptable:     1 and ½ hours, 2 and ½ hours, etc. Unacceptable:   ½ hour</p>
Bereavement	<p>Five (5) days maximum, non-cumulative. To be used for death of a family member (spouse, child, parent, son- or daughter-in-law, father- or mother-in-law, brother, sister, grandparent, grandchild, brother- or sister-in-law, step-parent, step-children; aunt, uncle, cousin). Sufficient time off with pay to attend local funeral of friend, co-worker or student. Any leave in excess of five days will be charged to accrued sick leave and/or vacation leave. Must state nature of bereavement.</p>
Sick	<p>One day per month, accumulative, to be used for personal illness or injury, or injury or illness of employee's immediate family and any person living in the home; district may request a physician's certification if absence is in excess of five consecutive days. Shall be taken in not less than one-half hour increments. Immediate family is defined as: spouse, same-gender domestic partner, custodial parent, step-parent, non-custodial parent, the biological, adoptive or foster parent or child of the employee, parent-in-law, parent of same-gender domestic partner, grandparent or grandchild of the employee, brother, sister, brother-in-law, sister-in-law, any person living in the home of the employee, or a person with whom the employee is or was in a relationship of in loco parentis. No limit on accumulation.</p>
Association	<p>Ten days for association business. Leave cleared in advance with immediate supervisor. Leave taken in not less than two-hour segments.</p>
Vacation	<p>Annual full-time classified employees earn between 6.67 and 16.67 hours per month depending upon their continuous length of service. Vacation is prorated for annual employees who work less than full-time but half-time or more. Employees who work less than 10 months plus one week do not earn vacation time. Must be employed three months before accessing leave time. Employees who earn between 6.67 and 13.34 hours per month may accumulate up to a maximum of 240 hours. Employees who earn 16.67 hours per month may accumulate up to 320 hours.</p>
Legal	<p>An employee called for jury duty, or who has received a subpoena at the request of the district or as a witness to represent the district for a job related reason, will receive full pay for the length of the jury or other applicable service, except that part-time classified personnel shall receive pay only for that portion of the day that the employee regularly works. The compensation paid to an employee for the period of leave shall be reduced by the amount of compensation or witness fees received by the employee, excluding mileage reimbursement. For the services, the employee may turn such compensation (except mileage reimbursement) directly over to the district without any consequent deduction in the employee's compensation. The employee shall immediately return to work after duty. This provision shall not apply to any legal actions or proceedings to which the employee is a party. As an individual or by class determination, nor shall it apply to any instances when the employee's presence is not at the request of the district.</p>

<p style="text-align: center;"><b>Licensed</b>  <b>(Southern Oregon Bargaining Council – Article 5. C. and Article 14)</b></p>	
Discretionary	Five-day maximum, usable in not less than ½ day portions if substitute required or in one-hour portions if substitute not required.. One day may be carried over from one year to the next for a maximum of six (6) days total in a contract year. The days are prorated by FTE and calendar for those not working full time or full academic year.
Bereavement	<p>The ESD shall comply with state leave laws regarding bereavement leave for grieving, estate matters, funerals, and memorials. Leave must be scheduled within sixty (60) days of the date the employee received notice of the death of a covered family member. The first two (2) days of bereavement leave will be district paid leave, and any remaining days the employee shall choose whether they are using discretionary or sick leave for the remaining eight (8) days.</p> <p>Bereavement applies to the death of a family member. Family is defined as: spouse, same-gender domestic partner, custodial parent, non-custodial parent, adoptive parent, foster parent, biological parent, step parent, parent-in-law, parent of same-gender domestic partner, grandparent or grandchild of the employee, or a person with whom the employee is or was in a relationship of in loco parentis. It also includes the biological, adopted, foster or stepchild of an employee or the child of an employee's same-gender domestic partner</p>
Sick	<p>One day per month, accumulative. Leave to be used for personal illness or injury, or injury or illness of employee's immediate family; district may request a physician's certification if absence is in excess of five consecutive days. Immediate family is defined as: spouse, child, parent, son- or daughter-in-law, father- or mother-in-law, brother, sister, brother- or sister-in-law, grandparent or any other person living in the home. No limit on accumulation.</p> <p><i>Note: Licensed employees who work 190-219 days earn 10 days of sick leave per fiscal year and licensed employees who work 220-239 days earn 11. One additional day of sick leave may be earned by an employee contracted for 190-219 days, if a calendar has been filed with Human Resources denoting that the employee will be on duty for at least 10 days in a month not already used to calculate sick leave.</i></p>
Council	18 days, if no substitute required leave usable in not less than two hour portions except that it shall be usable in one hour portions if taken at the end of the day; if substitute required leave usable in not less than ½ day portions. To be used to attend conferences and conventions of state and national affiliates and to work on council business.
Legal	An employee called for jury duty, or who has received a subpoena to testify in a court proceeding or at a legislative hearing involving the district, will receive full pay (for that portion or the day that the employee regularly works) for the length of the jury or other service, except those days served on non-contract or non-paid days. The compensation paid to an employee for the period of leave shall be reduced by the amount of compensation or witness fees received by the employee, excluding mileage reimbursement, for the services referred to above or the employee may turn such compensation directly over to the ESD without any consequent deduction in the employee's compensation. An employee called under the conditions listed under this paragraph and who is excused from duty, shall immediately return to work.

<b>Administrative - Licensed (Contracted by the SOESD Board of Directors)</b>	
Personal/ Emergency	Four (4) normal work days per contract year, and is usable in not less than one hour portions. Non-cumulative.
Bereavement	Five days maximum, no restrictions on amount taken, non-cumulative. To be used for death of family member and any person living in the home; to attend local funeral of friend, co-worker or student. Any leave in excess of five days will be charged to accrued sick leave and/or vacation leave. Must state nature of bereavement. Family member is defined as: spouse, child, parent, son- or daughter-in-law, father- or mother-in-law, brother, sister, grandparent, brother- or sister-in-law)
Sick	One day per month, cumulative. Leave to be used for personal illness or injury, or injury or illness of employee's immediate family; district may request a physician's certification if absence is in excess of five consecutive days. Immediate family is defined as: spouse, child, parent, son- or daughter-in-law, father- or mother-in-law, brother- or sister-in-law, step-parent, step-children. No limit on accumulation.
Vacation	Twenty (20) days per year. As of September 1 of each year, no more than 240 hours may be accumulated.
Legal	An employee called for jury duty, or who has received a subpoena to testify in a court proceeding or at a legislative hearing involving the district, will receive full pay (for that portion or the day that the employee regularly works) for the length of the jury or other service, except those days served on non-contract or non-paid days. The compensation paid to an employee for the period of leave shall be reduced by the amount of compensation or witness fees received by the employee, excluding mileage reimbursement, for the services referred to above or the employee may turn such compensation directly over to the ESD without any consequent deduction in the employee's compensation. An employee called under the conditions listed under this paragraph and who is excused from duty, shall immediately return to work.

<b>Administrative – Non-Licensed (Contracted by the SOESD Board of Directors)</b>	
Personal/ Emergency	Four (4) normal work days per contract year, and is usable in not less than one hour portions. Non-cumulative.
Bereavement	Five days maximum, no restrictions on amount taken, non-cumulative. To be used for death of family member and any person living in the home; to attend local funeral of friend, co-worker or student. Any leave in excess of five days will be charged to accrued sick leave and/or vacation leave. Must state nature of bereavement. Family member is defined as: spouse, child, parent, son- or daughter-in-law, father- or mother-in-law, brother, sister, grandparent, brother- or sister-in-law)
Sick	One day per month, cumulative. Leave to be used for personal illness or injury, or injury or illness of employee's immediate family; district may request a physician's certification if absence is in excess of five consecutive days. Immediate family is defined as: spouse, child, parent, son- or daughter-in-law, father- or mother-in-law, brother- or sister-in-law, step-parent, step-children. No limit on accumulation.
Vacation	Administrators (non-licensed) who are contracted for 260 days receive twenty (20) vacation days per year. A maximum of ten (10) unused vacation days may be carried over into the next year on September 1.
Legal	An employee called for jury duty, or who has received a subpoena to testify in a court proceeding or at a legislative hearing involving the district, will receive full pay (for that portion or the day that the employee regularly works) for the length of the jury or other service, except those days served on non-contract or non-paid days. The compensation paid to an employee for the period of leave shall be reduced by the amount of compensation



	or witness fees received by the employee, excluding mileage reimbursement, for the services referred to above or the employee may turn such compensation directly over to the ESD without any consequent deduction in the employee's compensation. An employee called under the conditions listed under this paragraph and who is excused from duty, shall immediately return to work.
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<b>Business Manager, Confidential, and Superintendent (Contracted by the SOESD Board of Directors)</b>	
Discretionary Leave	<p>Three days maximum, *one-hour portions. Must be employed at least three months. One (1) unused day of Discretionary Leave may be carried over from one year to the next for a maximum of four (4) days total in a contract year. All limitations have been removed.</p> <p>*Discretionary leave may be used in one-half hour portions when the half-hour is in conjunction with the use of one or more hours.</p> <p>Acceptable: 1 and ½ hours, 2 and ½ hours, etc. Unacceptable: ½ hour</p>
Bereavement	Five days maximum, no restrictions on amount taken, non-cumulative. To be used for death of family member and any person living in the home; to attend local funeral of friend, co-worker or student. Any leave in excess of five days will be charged to accrued sick leave and/or vacation leave. Must state nature of bereavement. Family member is defined as: spouse, child, parent, son- or daughter-in-law, father- or mother-in-law, brother, sister, grandparent, brother- or sister-in-law)
Sick	One day per month, cumulative. Leave to be used for personal illness or injury, or injury or illness of employee's immediate family; district may request a physician's certification if absence is in excess of five consecutive days. Immediate family is defined as: spouse, child, parent, son- or daughter-in-law, father- or mothering-law, brother- or sister-in-law, step-parent, step-children. No limit on accumulation.
Vacation	Twenty (20) days per year. As of September 1 of each year, no more than 240 hours may be accumulated.
Legal	An employee called for jury duty, or who has received a subpoena to testify in a court proceeding or at a legislative hearing involving the district, will receive full pay (for that portion or the day that the employee regularly works) for the length of the jury or other service, except those days served on non-contract or non-paid days. The compensation paid to an employee for the period of leave shall be reduced by the amount of compensation or witness fees received by the employee, excluding mileage reimbursement, for the services referred to above or the employee may turn such compensation directly over to the ESD without any consequent deduction in the employee's compensation. An employee called under the conditions listed under this paragraph and who is excused from duty, shall immediately return to work.

### **FMLA/OFLA**

(See Attachment A-50)

FMLA and OFLA are laws that entitle employees to leave benefits for their own serious health condition, birth, adoption, or foster-placement of a child, and to care for a seriously ill family member. Eligibility requirements differ between the two acts but at the minimum you must be employed at least 180 days and work an average of 25 hours per week to qualify.

Each eligible employee has an annual (January through December) entitlement of 12 weeks of leave under FMLA/OFLA. Oregon regulations provide that leave taken under FMLA will count toward OFLA entitlement. Both FMLA and OFLA guarantee your right to be restored to the position you held at the commencement of your leave or to an equivalent position.

At Southern Oregon ESD, FMLA and OFLA leaves run concurrently with paid leave, such as sick leave, vacation leave, personal leave, and leave for workers' compensation injury (FMLA only). An FMLA/OFLA leave will be paid to the extent that you have accrued paid leave available. Also under FMLA, the ESD will continue to pay the employer portion of insurance premiums, though you may not have accrued paid leave.

If an employee is absent for five consecutive workdays, the administrator or his designee will contact the employee and ask questions to determine if the leave qualifies for FMLA/OFLA, and if appropriate, initiate the FMLA/OFLA process. If approved, it is understood that the employee will not work during the period of his/her leave, for another agency as an employee or a private contractor during his/her normally scheduled work hours at SOESD.

To request FMLA/OFLA leave, please contact the HR department's Employee Specialist for detailed information regarding how to access your leave entitlement. (A form is also included in this handbook. See Attachment A-50)

### **INTEREST IN OTHER ESD POSITIONS**

Contact: Human Resources – (541) 776-8590 ext. 1184

Open ESD positions are posted on the ESD's website and all employees receive an email notification of the job posting. Employees interested in posted positions need to submit their application through TalentEd and discuss with their supervisor positions they are interested in.

## **CHANGES IN PERSONNEL ASSIGNMENTS**

Contact: Human Resources – (541) 776-8590 ext. 1184

There are many conditions that may affect changes in personnel assignments:

- Vacancies and Transfers
- Reduction in Force
- Terminations
- Change of Hours
- Resignations
- Retirements
- FMLA/OFLA
- Unpaid Leaves

A Payroll Change Notice must be completed by the administrator for any change in personnel assignment.

### **Temporary Pay Provision**

An employee, who assumes the duties of an absent employee, will be paid at the absent employee's code (if that code is higher) on the 21st working day of assuming the duties, with compensation retroactive to day one.

## **USE OF PERSONNEL FOR SPECIAL SERVICES (POLICY 7400)**

Contact: Business Manager – (541) 776-8590 ext. 1121

### **Inservice Within ESD Programs**

ESD personnel may provide services to other programs (evaluations, workshops, etc.) within the agency if their administrator gives prior approval and arrangements are made so that normal workstation responsibilities are met. Employees may not be compensated for such services to other programs if provided during normal working hours. Sometimes it may be necessary to arrange additional payment to an employee for providing a special inservice. In all such cases, the superintendent is to be informed when these service arrangements are made.

### **Payment Procedures**

Because of existing laws, it is not possible to issue a check separate from the normal payroll procedures. In a case where an employee is to receive extra pay for an inservice presentation (or any other reason), the pay must be put through the normal payroll procedure. This is accomplished by preparing a time sheet showing:

1. Name
2. Amount to be paid
3. Account to be charged
4. Approval of the administrator requesting the in-service

The time sheet will then be processed with the next payroll in the normal manner.

### **Services to “Outside Agencies”**

ESD employees are allowed to provide services within the work day to agencies outside their normal workstation if they have prior approval of their administrator. An employee may consult or provide services to an outside agency, if approved by the administrator, and if the employee receives no additional compensation from the ESD or other agency for the services provided. In all cases the administrator must approve all arrangements. In all such cases, the administrator will inform the superintendent of these arrangements.

## **PERSONNEL FILES/PERSONNEL DATABASE**

Contact: Superintendent’s Office – (541) 776-8590 ext. 1116

For access and content, see Board Policy 3920/4920 and association contracts. The Southern Oregon ESD personnel database information is to be used only by those employees who have been granted access. Confidential information is not to be printed in roster form and distributed. (Confidential information pertains to home address, home phone number, social security number and date of birth.)

**OVERTIME (NON-EXEMPT)**

Contact: Human Resources Office – (541) 776-8590 ext.1184

Overtime is time worked by a nonexempt employee in excess of forty (40) hours per week and shall be credited as comp time at the rate of time and one half (1 ½). Licensed employees are exempt. Overtime worked by a nonexempt employee must be approved in advance by his/her administrator. If employees work overtime without approval, the administrator may initiate disciplinary action. The administrator will arrange comp time to be taken in harmony with the work schedules of others in the area or program. When filling out a time sheet for extra/overtime work, employees will write a short description of the activity (including location) resulting in the overtime. Overtime and comp time must have prior approval of the program/department administrator and the method of compensation (comp time or overtime) needs to be identified at the time of approval of the work.

**FLEX TIME (NON-EXEMPT)**

Contact: Human Resources Office – (541) 776-8590 ext. 1184

Flex time is time within the 40-hour workweek. The workweek is defined as Monday through Sunday. It permits flexibility such as four 10-hour workdays and other arrangements agreed to by the employee and supervisor. It refers only to time within the 40-hour workweek. Arrangements for flex time are to be pre-approved by the program/department administrator prior to the employee changing their schedule for that week.

**ABSENCE WITHOUT PAY**

Contact: Human Resources Office – (541) 776-8590 ext. 1184

If an employee has not accrued appropriate leave and the employee does not report to work, the employee's pay will be docked. Example: An employee does not have vacation time but wishes to take a day off in the current month and requests to "trade" that time for a day of vacation that will be earned in the following month. This will be denied by the immediate supervisor. It is not the employee's automatic right to take a voluntary leave without pay (dock) when no paid leave is available.

## **SICK LEAVE BANK**

Contact: Human Resources Office – (541) 776-8590 ext. 1184

### **Preface**

SOESD established the sick leave bank several years ago because of inequities that came about as the result of individual requests. The following situations created inequities in how employees were helped.

- The agency experienced years where employees were asked to donate multiple times.
- The first requests always received more donations than the fourth or fifth request in a year.
- An annual employee needing the donations in the summer would not have easy access to academic year employee donations.
- A well-known employee might gather days beyond their needs while another employee, who was relatively new or not as familiar, did not receive as much support.
- ESD employees in Jackson County had a larger network of co-workers who would donate on their behalf.
- The agency had situations in which an employee did not use all the donations that were given and donating employees asked that their contribution be returned.

While the sick leave bank would cost the ESD money, it was decided to put a system in place to equitably help employees who were experiencing unpaid time due to absence from work because of a serious medical condition.

Since accrued leave time is given at the beginning of the year, all employees have enough sick leave and personal leave “on the books” in September to be eligible to contribute to the sick leave bank, if they choose to participate. Each open enrollment period (September 1 – October 15), employees are encouraged to donate to the sick leave bank. The bank provides an opportunity for employees, who have donated leave time, to make withdrawals from the bank for a serious health condition when all other appropriate paid leave provisions have been exhausted.

The sick leave bank exists for employees who have exhausted all paid leave time (sick, personal, discretionary and vacation) and are off the job more than ten working days due to an FMLA/OFLA illness/injury of employee or for the employee to care for member(s) of his/her immediate family who has suffered an illness/injury.\*\* (For example: An employee has a combined leave balance of vacation, personal, and sick leave of 60 hours. The employee must be off ten working days - 80 hours for a full-time employee. The employee must use all 60 hours, plus an additional 20 hours will be docked from the employee’s paycheck before the employee is eligible to use donated time.) Time from the bank will be given as sick leave and will be used for the purpose stated above. Immediate family is defined as: spouse, same-gender domestic partner, custodial parent, step-parent, non-custodial parent, the biological, adoptive or foster parent or child of the employee, parent-in-law, parent of same-gender domestic partner, grandparent or grandchild of the employee, brother, sister, brother-in-law,

sister-in-law, any person living in the home of the employee, or a person with whom the employee is or was in a relationship of in loco parentis. A "Sick Leave Bank Application" is available from the HR Office. The employee is eligible for sick leave bank access for a full calendar year (January-December) to draw for other serious health conditions of the employee or immediate family as long as a doctor's certification is submitted verifying the serious health condition and verifying the dates of absence.

Note: Time loss covered under workers compensation does not count toward eligibility for use of the sick leave bank.

**\*\* Elective/Cosmetic Procedures and Maternity Leave**

The bank was intended for unplanned or catastrophic illness and injuries. Planned medical procedures such as elective surgery, cosmetic surgery or maternity leave are not considered to be eligible for sick leave bank withdrawals. Eligibility for sick leave bank hours has to be considered as a medical procedure by our insurance carrier, meet the unplanned and catastrophic designation and be approved by administration. Unplanned complications as a result of childbirth will be considered on a case-by-case basis for the sick leave bank. This sick leave bank determination does not impact FMLA requirements in which parents may take unpaid leave to care for their newborns.

**Eligibility**

Employees have three participation options: 15, 30, or 45 days.

***Sick Leave Bank donations are accepted each year from  
September 1 through October 15  
for use January 1 through December 31.***

To be eligible for...	Employee must have accrued...	Employee must donate...
<b>Fifteen (15) work days of leave from the bank</b> (based on the employee's FTE)	A minimum of five (5) combination sick/personal/discretionary leave days. (40 hours for full-time employees and prorated for less than full-time employees.)	<b>One day</b> (8 hours for full time employees and prorated for less than full-time)
<b>Thirty (30) work days of leave from the bank</b> (based on the employee's FTE)	A minimum of ten (10) combination sick /personal/ discretionary leave days. (80 hours for full-time employees and prorated for less than full-time employees.)	<b>Two days</b> (16 hours for full time employees and prorated for less than full-time)
<b>Forty-five (45) work days of leave from the bank</b>	A minimum of fifteen (15) combination sick/ personal/ discretionary leave days.	<b>Three days</b> (24 hours for full time employees and prorated for

(based on the employee's FTE)	(120 hours for full-time employees and prorated for less than full-time employees.)	less than full-time)
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Employees may donate up to a maximum of 24 hours per year for use in the following calendar year for a qualifying absence.

Time from the bank will be given as sick leave and will be used for FMLA/OFLA illness/injury of employee or for the employee to care for members of his/her immediate family who have suffered an illness/injury.

#### **Procedure for Donating to Sick Leave Bank**

1. Employee obtains donation form (Absence Report) from program office.
2. Employee completes donation portion of form and forwards to the program office.
3. Program office checks the available sick leave and personal leave of employee to ensure that the employee is eligible to donate.
4. Program office processes the Absence Report form and forwards to Human Resources.
5. Employee Services deducts donated leave from donor's sick leave and/or personal leave account.
6. Employee Services maintains a file of donors and donated time.

#### **Procedure to Access Sick Leave Bank**

1. Employee obtains Sick Leave Bank Application form from program office. (A form is also included in this handbook. See Attachment A-18)
2. Employee completes application form and forwards it to Employee Services.
3. Employee Services secures superintendent's signature and notifies employee and appropriate administrator regarding approval or denial of the request.
4. If approved, hours are added to the employee's sick leave account and an equivalent number of hours are deducted from the Sick Leave Bank.
5. On at least a weekly basis, employee submits Absence Report to account for time used.

NOTE: Only employees who donate annually to the sick leave bank are eligible to participate. Part-time employees can participate on a pro-rata basis. Donations cannot be made for specific individuals. Donated time in the bank does not expire. If the bank does not contain sufficient time to fund requests of more than one employee, the available time is split equitably and more donated time is requested from employees.

Eligible employees are limited to receipt of a maximum of 45 days per calendar year, from the sick leave bank, depending on their level of donation, up to a total maximum of 90 days during their employment with Southern Oregon ESD.

The Human Resources office will maintain a tally of time donated and used. Time granted but not used will be deducted from the employee's sick leave account and returned to the bank. Program office is responsible for ensuring that Absence Reports are submitted for employees.



### **POLITICAL ACTIVITIES**

Contact: Business Manager – (541) 776-8590 ext. 1121

Public employees must be knowledgeable about ORS 260.432 (2).

*260.432 (2) No public employee shall solicit any money, influence, services or other thing of value or otherwise promote or oppose any political committee or promote or oppose the nomination or election of a candidate, the gathering of signatures on an initiative, referendum or recall petition, the adoption of a measure or the recall of a public office holder while on the job during working hours. However, this section does not restrict the right of a public employee to express personal political views.*

Public funds, which include employee work time, postage, telephone, and supplies, must not be utilized to promote or oppose candidates or issues.

### **ESD SPONSORED ACTIVITIES**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

Activities originating from or sponsored by the ESD will not include alcohol, whether hosted or non-hosted.

### **OREGON GOVERNMENT ETHICS COMMISSION (FORMERLY GSPC)**

Contact: Business Manager – (541) 776-8590 ext. 1121

State statute states that, "No public official shall use or attempt to use official position or office to obtain financial gain or avoidance of financial detriment that would not otherwise be available but for the public official's holding of the official position or office . . ." Public official is defined as "any person who . . . is serving the State of Oregon or any of its political subdivisions or any other public body of the state as an officer, employee, agent . . ."

Employees are reminded that they may not receive a benefit on a personal account for items purchased for the ESD. Example: Employee purchases items by check or cash on a personal account. Employee is reimbursed for those items by the ESD as they are to be used in the classroom. Subsequently, employee receives a discount on items purchased for personal use because of the amount of purchases on the account. (See attachment A-7)

## **COMPLAINTS (POLICY 3800/4800) (POLICY 5910)**

Contact: Human Resources Office – (541) (541) 776-8590 ext. 1184  
(See Attachment)

### **Complaint by Employee**

(Other than temporary, substitute, or part-time)

A “complaint” is an assertion by an employee that there has been a violation of board policy, board regulation or administrative procedure. The complaint procedure will not be used to resolve disputes and disagreements related to provisions of the collective bargaining agreement. Those types of complaints are handled through the grievance procedure. Complaints must be in writing.

Concerns or other conflicts that do not claim a violation of policies, regulations or procedures should be handled informally. It is the responsibility of the employee to discuss the issues with the individual with whom there is a concern. If that approach is unsatisfactory in resolving the concerns, the employee should contact his/her immediate supervisor to resolve the concern.

### **Complaint Regarding an Employee**

If a written complaint is received by the immediate supervisor regarding an employee, the employee shall be advised of the nature of the complaint within five (5) working days of receipt. In the event of a complaint against the superintendent, the board chair will be considered the supervisor.

The following criteria will be used to resolve the issue:

- The employee shall be entitled to representation through all phases of any investigative meetings with the employee regarding any such complaint(s).
- The complaint shall be discussed with the employee, by the appropriate administrator, in a timely manner. The employee shall receive a copy of the written complaint.
- The employee shall be apprised of the full nature of the complaint, including the name of the complainant.
- The employee and the appropriate supervisor will attempt to resolve the matter informally.
- The employee shall be advised in writing, in a timely manner, of the status/resolution of any such complaint.
- Complaints not discussed within five (5) working days following the receipt of the complaint may not be used pertaining to any disciplinary action.
- Unsatisfactory resolution may be brought to the full Board by the complainant after all attempts to resolve the complaint through the appropriate chain of command have been made.

## **SAFETY**

### **SAFETY COMMITTEE**

Contact: Business Manager – (541) 776-8590 ext. 1108

The safety and health of all employees is a shared goal of all who work for Southern Oregon ESD. SOESD's policy is that all employees share responsibility for taking reasonable steps to engender a safe and healthful workplace.

SOESD has a safety committee consisting of management and labor representatives. Meetings are held monthly during the academic year. The goal of the committee is to assist in identifying hazards and unsafe work practices, mitigating obstacles to accident prevention, and evaluating the District's safety program. The most recent month's Safety Committee minutes are posted to the SOESD website following the meeting in which they are approved.

SOESD expects all employees to cooperate fully with SOESD efforts to ensure employee safety. SOESD efforts include a focus on the following:

- Striving to achieve zero accidents and injuries.
- Taking reasonable steps to improve health and safety.
- Assisting loss control efforts aimed at identifying and mitigating industrial hygiene and/or safety hazards.
- Identifying reasonable and appropriate mechanical and physical safeguards.
- Conducting reasonable safety and health inspections.
- Training workers as needed in safe work practices and procedures.
- Providing employees with personal protective equipment as appropriate to specific job tasks, and training employees in its appropriate care and use.
- Using appropriate personal protective equipment.
- Reporting hazards, unsafe work practices and accidents.
- Assisting in the identification of the cause of on the job injuries, and in identification of reasonable methods to prevent similar occurrences.
- Supervising workers in safe work practices.
- Enforcing applicable safe work rules.
- Disciplining workers that fail to work safely.
- Participating in and supporting safety committee activities.
- Reviewing SOESD's safety and health program annually or as needed.

NOTE: Non-emergency health and safety concerns are to be reported to the Business Manager who serves as the SOESD Safety Officer. (See Attachment A-16)

## **ACCIDENT INVESTIGATION**

Contact: Human Resources – (541) 776-8590 ext. 1184

The immediate administrator is responsible for a thorough investigation as soon as possible after any accident has occurred. The employee is to call the Employee Services office to file an employee incident report. If the accident results in medical services, the employee will need to file a worker's compensation report with Employee Services. An accident follow-up form must be completed by the immediate supervisor and submitted to the business manager. These forms are available through the Employee Services office.

Accident investigation has one primary goal - to prevent accidents. It can also help in auditing the effectiveness of our overall safety program. The true objective is to make the workplace safer for everyone.

There are four steps in a good accident investigation:

1. Immediate response.
2. Investigation to get the facts.
3. Analysis of the facts to determine the causes.
4. Development of specific corrective actions.

## **FIRST AID**

Contact: Business Office – (541) 776-8590 ext. 1108

In the Medford building, first aid kits are located in the business office, repair and maintenance, Computer Information Services and School Improvement Department. In the Phoenix building, the first aid kit is located in the office near the front door. In the Klamath Falls building, the first aid kit is located in the meeting room.

## **AUTOMATED EXTERNAL DEFIBRILLATORS (AEDS)**

Contact: Business Office – (541) 776-8590 ext. 1108

Automated External Defibrillators (AEDs) have been installed in all of the SOESD offices – Medford, Phoenix, Klamath Falls, Grants Pass Regional, and Gilbert Creek.

## **BUSINESS OFFICE PROCEDURES**

### **PAYROLL**

Contact: Human Resources – (541) 776-8590 ext. 1184

#### **Name Changes**

All name changes are to be submitted to the Human Resources Department for initial processing. HR will require a new I-9 be completed by the employee with appropriate identification that reflects the new name. Once received, the name change will be processed and the necessary departments will be notified so that the appropriate changes can be made. For example: email address, direction information, name badges, Accounts Payable, etc.

#### **Cutoff Date for Time Sheet**

All time sheets are due to program secretaries as specified on the payroll schedule. Time sheets received after these dates will not be paid until the following month.

#### **Pay Dates**

For regular employees, the normal pay date is the 20th of each month. For substitutes, the normal pay date is the 15th of each month.

Exceptions:

- 2) If the pay date is on Saturday, pay date will be the Friday before.
- 3) If the pay date is on Sunday, pay date will be the Monday after.
- 4) In December, for both regular and substitute employees, pay date will be the last working day before Christmas break. (See Attachment A-13)

If an employee quits, without prior notice to the business office, and does not earn his/her pay through the end of the month, a request for reimbursement will be sent to the employee for the overpayment.

#### **Salary Draws**

The ESD does not give draws against salaries.

#### **Early Checks**

Checks are released early to employees only under two conditions: 1) the checks have been prepared and are ready to go out, 2) The employee will be away and not available to pick up his/her check at the regular time. No other exceptions.

#### **Having Someone Else Pick Up Your Check**

Under normal conditions, only the employee to whom the check is made out can pick it up. If you need to have someone else pick up your check, please notify the business office in writing. This will be retained in the personnel file. NOTE: This pertains to the spouse as well.

### **Voluntary Deductions from Paychecks**

Voluntary deductions from paychecks may be made, but only with the employee's written authorization. These deductions may include: Section 125 eligible expense (i.e. cancer insurance premiums, insurance deductibles, co-insurance payments, day care), tax sheltered annuities, United Way, Credit Union, etc.

### **Paycheck Automatic Deposit**

Automatic deposit of paychecks can be arranged. An "Authorization Agreement for Direct Deposits" is available in the Employee Services Office.

### **Tax Withholdings**

A current year W-4 form is included with this handbook. (See Attachment A-62 and A-63)

## **ACCOUNTS PAYABLE/PURCHASING**

Contact: Business Office – (541) 776-8590 ext. 1105

### **Petty Cash**

Petty cash funds exist in all five ESD sites. The fund at Medford will be under the control of the Business Office, at Phoenix and Klamath Falls under the auspices of the Special Education Office and at Gilbert Creek, under the control of the EI/ECSE program.

These funds are for making minor cash disbursements and the limit per each reimbursement is \$25.00. If an employee needs to be reimbursed for more than this amount, he/she should request a check from the Business Office, by submitting an ATP with an original receipt attached.

### **Use of Personal Credit/Debit Card**

The Southern Oregon Education Service District discourages use of credit/debit cards for district business purchases. As a public agency, our accounts payable records are not confidential and are open to the public for review.

When employees find it necessary to use their credit/debit card for purchases, they should first receive approval from their supervisor for the purchase. Credit/Debit card receipts will be accepted when necessary for authorized travel costs such as gasoline and lodging.

It is important for all individuals (paid employees and non-paid employees/agents) to recognize the expectations and requirements of SOESD with respect to reimbursement when using personal debit cards or credit cards. ORS 244 mandates that public employees receive no additional benefit from their public employment. Public employees may use personal debit cards or credit cards and ask for reimbursement, if the credit or debit card does not generate a benefit to the public employee (i.e. air miles, cash back, etc.). Prior to using personal debit cards or credit cards for agency purchases, employees will be required to complete and sign a statement attesting to the fact that the employee receives no personal benefit. (Attachment A- 15)

NOTE: Employees are not to use personal membership or reward cards when purchasing supplies for SOESD. (Examples include but are not limited to Safeway, Albertsons, Fred Meyer, Costco, Staples, etc.) SOESD has membership cards for the following vendors:

- Albertsons
- C&K Market – Ray's Food Place
- Fred Meyer
- Safeway
- Staples
- Sherm's Food 4 Less
- Thunderbird

### **Cooperative Purchasing**

Southern Oregon ESD's cooperative purchasing program maintains an inventory of classroom and office supplies. For special purchases, the program explores the most cost-effective means of purchase of SOESD department and classroom supplies. The SOESD website hosts a listing of items available throughout the year. Employees should review the list for common classroom and office supplies and check with the cooperative purchasing program first, before making purchases. (See [www.soesd.k12.or.us/business](http://www.soesd.k12.or.us/business) for the cooperative purchasing list of supplies.)

### **Authorization to Pay (ATP)**

(Must use approved Business Office form)

Deadline to turn into the Business Office for the next week's check run is Friday, noon. For anyone submitting paperwork for reimbursement please put all the receipts on one ATP for the week. You can use multiple account codes if needed on one ATP.

Authorization to Pay is a form used to request payment to a business or person who has performed a service and no purchase order was used. It is important to note that purchases requiring reimbursement should be in keeping with program needs. Employees should seek administrator approval before committing personal funds toward an agency or program purchase. The administrator reserves the right to refuse reimbursement should the purchase be outside of the parameters set by the administrator. Example: A reimbursement to an individual for a purchase made with their funds; a purchase of supplies from a company that does not require a purchase order; or a contractor paid for services rendered. An original receipt, invoice, or statement and a copy of the original receipt, invoice, or statement must accompany the ATP.

The form should be filled out completely with a current address and a full description of purchase or service.

The final step should be an authorized signature and if the ATP is to that person, it must be signed by the authorized signer's supervisor. ATPs are processed once a week.

### **Prepaid Authorization to Pay (ATP)**

A prepaid ATP is a form used to request prepayment for goods or services not yet received, when no purchase order is required by the business or person for initiating the purchase or service. As in all cases of expenditures, administrator approval is required. Following delivery of goods or service provided, a written receipt must be submitted to the business office.



## **TRAVEL**

Contact: Business Office – (541) 776-8590 ext. 1105

### **General Guidelines**

SOESD expects employees to use the most economical means of travel. Travel time, number of employees traveling together, safety, road conditions, and distances are considered when determining economies and efficiencies.

SOESD has purchased a limited number of vehicles for work-related travel for ESD employees. SOESD liability coverage is only extended to employees on work-related activities in agency vehicles. If an employee uses their personal vehicle for work-related activities, the employee's insurance is primary and SOESD insurance is secondary.

Family members, non-employees or students are not to be transported in ESD vehicles unless it is required in the job description of the position. SOESD or school district employees attending a SOESD work-related meeting may be transported in ESD vehicles.

### **In-Service Area Travel Reimbursement**

(See Attachment A-9)

In Service Area Travel Reimbursement forms are due in the Business Office by the 19th of each month. The checks are mailed on the 25th. Forms that arrive after the 19th are processed the following month.

The Business Office processes reimbursements for the month prior. The current month's travel is not reimbursed until the following month. (In the summer the travel is included in the weekly AP run.)

Employees are to use a new reimbursement form for each month. Claimant and supervisor are required to sign all pages of the original travel reimbursement.

Updated forms are available on the SOESD web site; hard copies are available from the Business Office. The employee's vendor number is to be entered on the form and travel reviewed for accuracy and totals calculated by the administrative assistant. The appropriate account code is recorded on the travel form by the administrative assistant. If the employee does not have a vendor number, the mailing address is required so that the employee can be entered in system. Note: In service area travel is a 0341 object code.

Reimbursement for actual miles traveled on ESD business shall be at the current IRS approved rate per mile. Only those miles actually traveled in connection with ESD business may be claimed and mileage will be computed by using the Mileage Chart – Selected Cities in Oregon, prepared by the Oregon Department of Transportation, or ESD mileage charts. Mileage reimbursement must be submitted at least every three months.

Example:

Business office receives a travel request for December, January, and February. The business

office receives this March 19th. This individual will be paid for all three months with the March payment process.

Business office receives a travel request for December, January, and February. The business office receives this March 31st. This individual will be paid for all three months with the April payment process.

Business office receives a travel request for December, January, and February. The business office receives this April 1st. This individual will not be paid for all three months, only January and February.

Mileage reimbursement to and from the worksite will not be granted, unless otherwise stipulated in the collective bargaining agreement.

The following are guidelines to be followed for all mileage reimbursement claims:

1. Travel forms must be completed in ink or may be completed on a computer using the approved agency format.
2. Ditto marks will be accepted on up to five entries only.
3. For non-ESD locations, the street address of departure location and travel destination must be included.
4. Each travel sheet must be signed by the claimant and immediate administrator.
5. Mileage claims must be received at the program level by the 7th of the month and received in the Business Office by the 19th of the month, or they will not be processed until the following month's travel check run.
6. Mileage claims must be submitted in complete months. Example: March travel submitted April 4 should not include travel during those first four days of April.
7. Only abbreviations that can be clearly understood may be used.
8. Address at the top of the travel form must be completed if it is for a new employee or there is an address change since the last travel check was issued. Highlight the change.
9. Mileage should be rounded up/down to the nearest whole mile (under five round down/five and over round up to nearest whole number).
10. If mileage presented for reimbursement is less than that allowed on the ESD mileage chart, reimbursement will be for the mileage submitted. If mileage submitted is more than that shown on the chart, reimbursement will be only for the number of miles on the chart.
11. No employee will be paid for mileage to and from work.
12. All travel forms that do not follow these guidelines will be returned to administrator for correction.

NOTE: When using personal vehicles for agency business, only mileage reimbursement at the IRS approved per mile rate will be granted. Gas receipts will not be reimbursed.

### **Car Rentals**

Car rental should be utilized whenever mileage reimbursement exceeds the cost of the car rental. The program Administrative Assistant will make arrangements with the rental company to direct bill the ESD for the car rental. If employees wish family members or friends to accompany them in ESD-rented vehicles, prior approval must be obtained from the administrator. Employees must obtain additional insurance from the rental company and reimburse the district for the additional insurance cost. The additional insurance must cover these three areas; damage waiver; supplemental liability, and personal accident. The rental agreement must be in the employee's name. If combining ESD business with vacation or personal leave, the employee must rent the car in the employee's name.

Employees must check rental cars for damage when the cars are returned. This is necessary, as the ESD has been charged for damage to vehicles, since the employees renting the vehicles had not checked them upon return and it was not known when damage occurred. Reimbursement for gas purchases may be made by using an Authorization to Pay (ATP). Original gas receipts are required.

### **ESD-Owned Vehicles**

Southern Oregon ESD owns vehicles available for check-out for ESD or school related business. If the employee is combining ESD business with vacation or personal leave, the employee is not permitted to use an ESD-owned vehicle. Only Southern Oregon ESD employees are authorized to drive ESD-owned vehicles. In addition, family members and friends are not to travel in ESD-owned vehicles, unless they are on ESD business. The Business Office and the Special Programs Office are in charge of reserving these vehicles.

Checking out a vehicle requires a reservation. Reservations are made through the assigned office professional in the Business Office or at the Phoenix building. Since there are a limited number of vehicles, please do not reserve a vehicle for trips of less than thirty miles (sixty miles round trip). Note: This requirement does not apply when transporting students. You can pick up the keys from the assigned office professional on the reserved date.

The vehicle and keys are to be returned promptly at the end of the trip. The interior of the vehicles is to be kept clean and free of litter. Smoking is not allowed in the vehicles. Accidents or vehicle damage are to be reported to the immediate supervisor and the ESD business manager.

### **Insurance Costs**

It is the responsibility of the owner or driver of the vehicle to make certain that adequate personal liability and property damage (as required by Oregon State Law) is maintained. Persons who transport students should carry a minimum of \$300,000 liability.

### **Out-of-Service Area/State Travel Using Personal Vehicle**

Out-of-service area or out-of-state use of a personal vehicle while on district business must be approved by the appropriate administrator. A request for release time/travel advance must be

completed and be approved by the employee's immediate administrator before any out-of-service area/state travel can be confirmed. A completed Out-of-Service Area/Overnight Lodging Travel Reimbursement form for mileage, lodging, and meals must be submitted to the program administrator in advance of the travel date.\*\* If this procedure is not followed, with regard to receipt in the business office of the completed, approved form before travel occurs, disciplinary action may follow. If approved, the program administrator will forward the Out-of-Service Area/Overnight Lodging Travel Reimbursement form to the business office before date of travel.

All out-of-state travel requests and requests to use air travel must be submitted to the supervisor who will then submit the written request to the superintendent for review. The superintendent signs the request giving approval or denial and returns it to the program office. The request should be submitted one month in advance; however, in unique situations the timeline may be shortened. (See Attachment A-12)

### **Travel Outside of the Continental United States**

Travel for ESD business outside of the continental United States requires prior approval from the SOESD Board of Directors.\*\* All requests for this type of travel must go through the program director to the superintendent. If approved by the superintendent, the request will be presented to the Board and the next regularly scheduled Board meeting.

\*\* Enough time should be allowed to process the paperwork through all the appropriate channels. If sufficient time is not allowed, the requests for pre-payment will be denied and the employee will be reimbursed when appropriate receipts are submitted.

### **Travel by Air**

If traveling by air, all flight arrangements will be made by the superintendent's office. The program Administrative Assistant will complete a Travel Coordinator's Worksheet, secure the program director's approval for air transportation and forward it to the superintendent's office. The superintendent approves all air travel. If the employee feels that the travel arrangements made by the superintendent's office are not convenient for the employee, the superintendent's office is to be notified and will redirect the employee to make his or her own arrangements. However, any increased cost for the changes will be responsibility of the employee and not

NOTE: When travel arrangements include family members or friends, the ESD employee is requested to make his/her own arrangements and the ESD will reimburse at its normal rate of reimbursement.

### **Travel Advance/Accounting**

An employee may receive travel expenses in advance not to exceed the following:

Mileage:	Shortest route, IRS approved rate		
		<u>In State</u>	<u>Out of State</u>
Meals:	Breakfast	\$7.00	\$9.00
	Lunch	\$7.00	\$9.50
	Dinner	<u>\$16.00</u>	<u>\$23.50</u>
		<u>\$30.00</u>	<u>\$42.00</u>
Lodging:	A receipt for <b>all</b> lodging is required and must be submitted to the Business Office to be filed with the original paperwork.		

Employees are expected to shop for economical lodging. When out of town on ESD business, the ESD will pay for a single room unless the single and double room rates are the same. If an employee wishes a double room, the employee must pay the difference between the double and single rate. When traveling in or out of state, lodging inquiries will always include a request for the "state rate." Lodging must be prepaid to the motel/hotel or conference sponsor or direct billed to the ESD, unless prior arrangements between the employee and their supervisor have been made. Hotel receipts must be turned in to the appropriate program administrative assistant as soon as possible. Any additional charges to an employee's lodging bill besides room and tax will be the employee's responsibility.

If you are making reservations for anyone who is not an employee of the ESD, please email Accounts Payable with the vendor name, dates and their names. This information is very important when the bills arrive.

For either an advance or for filing travel upon return, employees may receive up to but not to exceed \$30.00/in state, \$42.00/out of state per day for meals. The Business Office does not require receipts for meals.

### **Travel and Related Meal Expenses**

1. Meal receipts may be requested by your supervisor.
2. To be eligible for breakfast and/or lunch reimbursement, travel must be from your home or designated work site requiring an overnight stay the night before.
3. Any travel (including out-of-state) from your designated worksite which causes you not to return home that night, or to return home after 6:00 p.m. via the most direct route, makes one eligible for dinner reimbursement with the following exception; if the employee has a flexed workday, i.e. 12:00 noon to 8:00 p.m., the employee would not be reimbursed for dinner.

This procedure will be reviewed regularly by the administrative team.

### **Normal Reimbursable Expenses**

Approvable expenses include toll charges, parking fees, tips, valet services, cleaning, pressing, and laundry, if the length of the trip or circumstances demand such expenses. Specify each type and amount of the expense.

Non-reimbursable expenses include, but are not limited, to the following:

1. Repairs, towing, or service of personal vehicle
2. Any mileage except actual miles driven on district business
3. Personal expenditures for entertainment, medicines, alcoholic beverages, etc.
4. Gifts for employees
5. Air travel life insurance fees
6. Expenses for spouse
7. Repair or replacement of personal items
8. Doctor bills for illness or treatment
9. Gratuities in excess of 15% unless an automatic gratuity in excess of 15% is included in the bill.

### **Combining District Travel and Vacation/Personal Travel**

SOESD personnel traveling to a work assignment are not encouraged to extend work with personal activities. Oregon Government Ethics Commission guidelines do not allow public employees to personally benefit from their employment. However, if employees choose to extend their work-related trip for personal reasons the following guidelines apply:

1. If combining vacation or personal business with business travel, the employee is to make all of the travel arrangements and is not eligible for SOESD/government agency discounts.
2. The ESD will reimburse at the rate it would have cost the district had the employee not combined vacation or personal leave with business travel and the employee will be reimbursed for one-way travel if the travel is extended for personal reasons.
3. All time away from work caused by travel by less than the most expeditious means available must be charged to vacation or other appropriate leave.
4. Time delays forced by business or travel schedules will be charged to working time.
5. If the employee travels for vacation purposes to a point that he/she would not have visited for business, the employee must pay the additional cost.
6. Work-related travel costs associated with combining work with personal will be reimbursed at established SOESD rates.

### **Travel Options**

Options for travel reimbursement are:

1. Travel is not authorized by the district but the employee may take personal leave or unpaid leave and the employee pays costs.
2. Travel is at the request of the district or authorized by the district and the district will pay costs.
3. Travel is at the request of the employee and attended with district approval, the district agrees that the employee may take duty time and the district pays the costs.
4. If attended with district approval, but the budget does not allow for full payment, the employee can take duty time and partial payment (registration, travel, lodging, meals, or gas, etc.) may be available.

## **MISCELLANEOUS BUSINESS OFFICE INFORMATION**

### **ODE REIMBURSEMENTS**

Employees need to complete the reimbursement paperwork to reflect that the payment is to be made to Southern Oregon ESD. If this is not done, ODE will issue a 1099 to the employee, which may have tax consequences.

### **DONATIONS (POLICY 8600)**

The Board authorizes the superintendent or designee to accept or refuse donations on behalf of the ESD. When a department is offered a non-monetary donation, the department administrator will correspond with the superintendent or designee identifying the donation and stating its intended use and purpose. The superintendent or designee will decide whether or not to accept the donation. If accepted, the business office will determine the value of the item and will send a letter to the donor recognizing the donation and stating its fair market value. If not accepted, the superintendent or designee will notify the administrator, who will communicate this action to the donor.

### **ASSET INVENTORY**

When ordering or paying for equipment and supplies on the same PO or ATP, break out the cost between the 410's and the 460's or 540's.

If the value is \$.01 to \$499.99 the object code is 410. If the value is \$500.00 to \$4999.99 the object code is 460. If the value is \$5000.00 or more the object code is 541 or 542.

If the program administrator wants to track items that are valued at less than \$500.00, they will track them within their department.

When deleting an item, be sure to put the reason for the deletion on the form, i.e. broken, beyond economical repair, can't find, etc.

When transferring equipment from one area to another, an asset inventory form needs to be completed and forwarded to the Business Office. (See Attachment A-2)

### **Purpose**

Federal, state, and local auditors require that a record be kept of all ESD assets. Above and beyond this requirement is the fact that knowing what is owned and where the items are located makes good common sense.

### **What is an Asset?**

To be an asset, a purchase should meet all of the following criteria:

1. Will not be consumed in year of purchase.
2. Expected usable life is greater than one year.
3. The item costs in excess of \$500 per unit (purchase price should include shipping costs).



### **Use of the Information**

In addition to the requirement that records of assets be kept for audit purposes, the information is used in other ways:

1. An important purpose of the information is to indicate the location of certain items. Furniture, equipment, etc., are often requested by ESD teachers for their classrooms. If the Business Office staff knows where all equipment is located, items that are considered "surplus" by one program can be used elsewhere.
2. ESD assets are insured against fire and other hazards. The insurance company must be furnished with a list of the assets and their location. However, the ESD does not carry insurance on district-owned laptop computers. When one is lost or stolen, the cost of replacement falls entirely on the ESD.

### **New Purchases**

Capital purchases are tagged by the receiving department/program. Program staff must complete an inventory slip on all new equipment/assets and attach a copy of the invoice or purchase order for the equipment. If a piece of equipment is noticed that is not tagged, the Business Office in Medford should be informed.

There are two ways of tagging merchandise: 1) tag merchandise and send in the completed inventory slip along with payment via a Purchase Order or ATP; 2) if an inventory slip is not submitted with payment, the Business Office will send a copy of the Purchase order/ATP with an inventory tag and slip to the program Administrative Assistant to complete and return.

### **Taking Inventory**

The inventory list will be provided by the Business Office in November. These lists will contain all items recorded for a particular location. The items should be checked against the listing and identified tag numbers. If an item cannot be located, it should be noted "can't find" on the list. The Business Office will identify and review these "can't find" items and may contact the program supervisor for further investigation of these items. Departments/programs will be held accountable for any fixed assets marked as "can't find" on the asset inventory. Items that are in an office or classroom may not be on the list. If they have an approximate value of \$500 or more, they should be noted at the bottom of the list so information can be corrected by the Business Office. As part of this process, the Business Office will send an instruction sheet with inventory listings.

### **Disposal – Beyond Economic Repair (BER)**

When programs/departments are considering disposal of electronic equipment assets, they will contact Electronic Services to determine if the equipment is beyond economical repair.

## **GRANT SUBMISSIONS PROCESS**

(See Attachments A-10, A-11)

If you intend to write a grant, you must submit the Intent to Submit Proposal for Grant Funding form to the program director. The program director will sign off and submit the intent to the superintendent's office. It should be noted if the proposal represents a competitive grant. If so, a notice to all departments will be generated providing notification of the intent. If there are no in-house competing grants identified within two weeks, the proposal will be approved to proceed by signature of the Superintendent. The process is outlined below. A checklist is also provided to ensure that the appropriate approval process is followed. (See Attachment A-10)

1. The grant application needs to be approved by the program director before submission to the superintendent. If approved by the director, the application must be submitted to the superintendent before submission to the granting agency, preferably one week before the deadline. Discussions with the director and superintendent need to occur pertaining to in-kind issues and indirect cost charges (please contact the Business Office for current rates). If there is a contract involved with the funding, the contract will be reviewed by the business manager prior to signing.
2. Once the grant is approved, a copy of the grant proposal and award letter needs to be sent to the business office with a budget breakdown. The budget breakdown needs to follow agency budget coding.
3. The department or program needs to monitor when interim or final reports need to be submitted, as well as request for funds routed to the business office.
4. If staff time needs to be charged to the grant or contract, department/program will submit information to the business office documenting the time to be charged to the grant/contract.
5. Department/program will confirm revenue source (federal, state, private) and provide this to the business office (if federal, CFDA number is necessary for the business office files).
6. If there is in-kind expectation, the department/program will provide that information to the business office for inclusion into the grant file.
7. When preparing the budget for grant submission, please remember to include any benefit percentages for district personnel/contracts and remember to plan for this percentage to change over the life of the grant if it is a multi-year contract (please contact the Business Office for current rates).

The SOESD Board has given administration authority to apply for grants, and if received the Board has to approve the grant budget. All contracts should be signed by the service provider, supervisor and superintendent before services are rendered. The business manager is authorized by the Board, in the superintendent's absence, to sign grants and contracts.

## **BUSINESS OFFICE PROCEDURES**

### **1. Timelines**

- a. Purchase Requisitions – in Business Office by Thursday end of business. Processed each Friday, mailed out on Monday.
  - i. **Prepaid Purchase Orders** – Mark Pre Pay in red or highlight. Prepays will go out in the next weeks check run
- b. **Processing Purchase Orders to pay, ATP's & Out of Service Area Travel** – in Business Office on Fridays by noon. Attach the original & a copy of the receipt/invoice (Turn in the yellow copy of the Purchase Order).
  - i. ATP's: For anyone submitting paperwork for reimbursement please put all the receipts on one ATP for the week. You can use multiple account codes if needed on one ATP. (In the past, we have received up to four ATP's for one person in the same week.)
- c. **Check Runs** – processing begins on Monday, checks will be mailed on Friday, sooner if possible.
- d. **In Service Area Travel** – forms are due in the Business Office by the 19th of each month. The checks will be mailed on the 25th.
  - i. We are paying for the month just past, the current month's travel will not be paid until the following month. (In the summer the travel is included in the weekly AP run).
  - ii. Use a new reimbursement form for each month. Claimant & supervisor need to sign all pages.
  - iii. We need the original travel form with original signatures, not faxed copies.
  - iv. Forms that arrive after the 19th will not be processed until the following month.
  - v. Reimbursement will only occur for the month just past, plus two prior. i.e.: It is February, you can turn in travel forms for January, December & November, anything older than that is too late to be reimbursed for. This is in our Handbook.
  - vi. Updated forms are available on our Web site; hard copies are available from the Business Office. **Please make sure your staff receives and uses only the updated forms.**
  - vii. Review travel for accuracy. Tally and calculate totals. We will let you know the current travel rates as soon as possible (changes are usually the first of January).
  - viii. We have to have a mailing address for the person asking for reimbursement, so we can give them a vendor number.
  - ix. In service area travel is a 341 object code.

### **2. Faxing Purchase Orders**

- a. Program Office will write "To Be Faxed" on purchase order requisition.
- b. Business Office will generate purchase order and return it to the Program Office.
- c. Program Office will fax purchase order and retain the original. Please note: It is the responsibility of the Program Office to know whether or not the vendor will accept a fax instead of the original.

**3. Out of District Travel:**

- a. All out of state travel must be approved by the Superintendent. All travel outside the continental U.S. must have prior approval by the Southern Oregon ESD Board of Directors.
- b. Out of area conferences, workshops (including airfare, hotels & meals) are a 342 object code.

**4. Hotel/Car Reservations**

If you are making reservations for anyone who is not an employee of the ESD, please email Accounts Payable with the vendor name, dates and their names. This information is very important when the bills arrive.

**5. Credit Cards / Debit Cards**

- a. The agency has its own credit card. The use of this card is based on the following:
  - i. May be used to hold a Hotel/Conference Reservation if a check is to be mailed or hand carried. Call the Business Office for information.
    - 1. We are finding that quite a few reservations for conferences & lodging are requiring payment by credit card, especially out of state or large conferences.
    - 2. You may want to verify with the vendor that they will accept a corporate check.
    - 3. If payment can only be made by credit card, the business manager's approval will be needed.
    - 4. You will need to contact the Business Office and give them all the information regarding the credit card charges. We have to check the available balance on the card to allow its use and reconcile the statements.
    - 5. Upon completion of all reservations, please shred the agency credit card information.
  - ii. Other requests will be discussed between the program administrator and the business manager.
  - iii. A purchase approval will be made based on the special circumstances of each request.

## **6. Receipts**

- a. Only an original receipt will be accepted. This prevents an invoice from being paid twice. The receipt needs to show what was purchased, the total and the method of payment.
  - i. *Business Office keeps original receipt/invoice on file. Copies will be sent with payment.*
- b. For travel reimbursement, make sure you submit original gas receipts and any pre-authorized conference purchases.
- c. Hotel receipts must be turned in to your program secretary as soon as possible. Any additional charges to your bill besides room and tax will be your responsibility.

## **7. Petty Cash**

- a. Petty Cash can be utilized for occasional minor purchases of \$20.00 or less. Purchases over \$20.00 will need to follow our regular procedure. Petty Cash may not be used for travel reimbursement.
- b. Petty Cash should be reimbursed at least every quarter. End of September, end of December, end of March and end of June.

## **8. Asset Inventory**

- a. When ordering or paying for equipment and supplies on the same P.O. or ATP, break out the cost between the 410's and the 460's or 540's.
- b. If the value is \$.01 to \$499.99 the object code is 410. If the value is \$500.00 or more the object code is 460. If the value is \$5000.00 or more the object code is 541 or 542.
- c. If the program administrator wants to track items that are valued at less than \$500.00, they will track them within their department.
- d. When deleting an item, be sure to put the reason for the deletion on the form, i.e. broken, beyond economical repair, can't find, etc.
- e. When transferring equipment from one area to another, a form needs to be filled out. We can only track our inventory if we know where it is.

## **STANDARDS FOR EQUIPMENT AND FACILITY USE**

### **TELEPHONE USAGE**

Contact: Business Office – (541) 776-8590 ext. 1121

Phone usage, other than business related, is to be kept to a minimum. If an employee needs to make a personal long distance call, the employee should use his credit card number, call collect, or in the case of an emergency and both of these options are not feasible, he/she may dial long distance direct. The employee would then call the Business Office with the date of the call, what city and number the call was placed to and the length of the call. The Business Office will contact the employee for payment.

The district may provide cellular telephones for the professional use of ESD staff members. ESD-provided cell phone should be on during the workday. Personal calls are not permitted on these phones unless an emergency exists during the workday. If a call is made under an emergency condition, report it to your administrator, who will report it to the business manager. No personal or emergency calls may be made after work hours using ESD cell phones.

Southern Oregon ESD wants all employees to be safe as they provide services to our component school districts. When behind the wheel of a motor vehicle, it is extremely important to stay in the “here and now” with body and mind. SOESD employees are expected to comply with hands-free cell phone use while operating a motor vehicle during the course of the work day. SOESD does, however, recommend that while driving, allow calls to go to voice mail and retrieve voice mail when a safe location has been reached and the motor vehicle is stopped.

### **TELEPHONE STANDARDS**

Contact: Superintendent’s Office – (541) 776-8590 ext. 1116

The following telephone standards have been adopted for use in all ESD offices:

1. Phones are to be attended during the hours the agency is open: 7:30 AM to 4:30 PM during the academic year, and 7:00 AM to 4:00 PM in the summer.
2. Whenever possible, arrangements are to be made with other individuals or departments to cover the phones in lieu of using voice mail.
3. All voice mail messages are to include identification of: the agency, the department and the person. (It is the responsibility of each staff member to maintain his/her voice mail message)

### **FAX MACHINE USAGE**

Contact: Business Office – (541) 776-8590 ext. 1121

School district personnel and agencies dealing with school districts may utilize the machines for school-related business. There will be no charge for this use.

ESD employees may use the machines for personal correspondence under the following guidelines:

1. The cost is \$.25 per page to receive.
2. The cost is \$.50 per page to send (in country only).
3. Payment is expected at time of use.

### **COPY MACHINE USAGE**

Contact: Business Office – (541) 776-8590 ext. 1121

Copying in excess of 1000 copies in one run is to be taken out of the ESD to a local print shop. Example: 5 documents where 200 copies of each are needed; 10 page document where 100 copies are needed; 5 page document where 100 two-sided copies are needed.

ESD employees may use the machines for personal copying under the following guidelines:

1. The cost is \$.05 per page.
2. Payment is expected at time of use.
3. Number of copies is limited to 36 at one time.

### **EQUIPMENT USAGE**

Contact: Business Office – (541) 776-8590 ext. 1184

If equipment is to be lent to staff or outside agencies/individuals, equipment loan agreements must be filled out and submitted to the program office lending the equipment. A copy of the equipment loan agreement is also to be forwarded to the SOESD business office for asset management purposes. It is important to remember that equipment is to be used for educational and/or staff development purposes only.

### **COMPUTER/SOFTWARE USAGE**

Contact: Computer Information Services – (541) 858-6730

All ESD employees will sign a "Computer, Network, and Internet Use Agreement" informing them of Southern Oregon ESD's policies and procedures as stated in the agreement.

Computer usage is to be in accordance with guidelines stated in the "Computer, Network and Internet Use Agreement" and Board Policy 8700. Southern Oregon ESD reserves the right to monitor or examine all computer and network activities including electronic mail and the content of your computer's hard drive. ***Note: Email is not confidential.***

## **COMPUTER INFORMATION SERVICES (CIS)**

Contact: Computer Information Services – (541) 858-6730

Computer Information Services (CIS) provides technical support for computers, software, and peripherals, including assistance with email and server access; purchase and installation or relocation of computers and peripherals; and installation or removal of software.

CIS manages mail and file services and the agency's web site. CIS purchases all computer hardware and software for the agency, consults with staff regarding their computer hardware and software purchases, and manages the agency's computer software licensing. CIS also provides custom web and data solutions, and delivers computer training.

### **Contacting the Help Desk**

Computer Information Services operates a technical support Help Desk providing phone support; remote and on-site troubleshooting; diagnosis and repair of servers / desktop computers / peripherals; remote training; and advice on planning and purchasing.

To contact the Help Desk:

Phone: 541-858-6730 / 866-858-6730

Email: [support@soesd.k12.or.us](mailto:support@soesd.k12.or.us)

Web: [www.soesd.k12.or.us/helpdesk](http://www.soesd.k12.or.us/helpdesk)

When contacting the Help Desk, communication should include your name, department, worksite, phone, email address, brief description of the problem, and equipment tag number or serial number.

### **Computer Training**

Technology trainings are sometimes offered throughout the year. SOESD staff development offerings can be viewed on our web site at <http://www.soesd.k12.or.us/workshops>. Staff should obtain approval from their supervisor to attend training, and may register online. Departments may also request individual training and arrange for custom workshops by contacting the Computer Information Services Help Desk by calling 541-858-6730 / 888-858-6730 or emailing [support@soesd.k12.or.us](mailto:support@soesd.k12.or.us).

### **Computer Hardware and Software Purchases**

Computer Information Services process all purchases for computers, peripherals and software agency-wide. To request hardware or software purchases, staff may contact the Computer Information Services Help Desk by calling 541-858-6730 / 888-858-6730 or emailing [support@soesd.k12.or.us](mailto:support@soesd.k12.or.us). The Help Desk can assist by determining staff needs, making recommendations, and discussing staff needs with supervisors, who can approve request for purchase. Staff is encouraged to communicate their purchase requests with their supervisor, who must approve staff requests to purchase hardware and software.



### **Computer Software Installation**

To request purchase or installation of software, please contact the Computer Information Services Help Desk by calling 541-858-6730 / 888-858-6730 or emailing [support@soesd.k12.or.us](mailto:support@soesd.k12.or.us).

Employees issued agency-owned mobile devices are authorized to purchase and install software on those devices using the agency accounts associated with those devices utilizing agency allocated funds. However, employees are encouraged instead to have CIS purchase and remotely deploy software to their device, to maximize cost savings for the agency.

If an employee's mobile device account becomes depleted of funds, they may request from their supervisor that additional funds be assigned. If approved, the supervisor will notify CIS to place additional funds on their account.

Personal software should not be installed on agency devices. The installation and use of unauthorized and/or illegal (not properly licensed) software is not allowed. Systems for monitoring adherence to software licensing will be maintained. If it is found that an employee's computer contains software in violation of copyright laws and/or agency policy, or that software installed by the employee repeatedly causes incompatibility issues or threatens the security of the network, the employee's account privileges may be changed to exclude the ability for staff to download/install software and the appropriate administrator will be notified.

Unauthorized and/or illegal (not properly licensed) software is not allowed.

### **Databases**

Password protected databases are accessible on Southern Oregon ESD's servers. These databases include agency-wide, as well as program specific databases. To request addition of databases to the server, or for assistance accessing or using these services, please contact the Computer Information Services Help Desk by calling 541-858-6730 / 888-858-6730 or emailing [support@soesd.k12.or.us](mailto:support@soesd.k12.or.us).

### **Web Site**

Southern Oregon ESD's web site is designed to enhance communication and collaboration among component school districts, to assist the ESD in delivering services to local education agencies, and to provide information to the community concerning ESD services. The site provides resources concerning educational and related topics, facilitates sharing and cooperation among educational providers, and promotes learning and development of educational professionals and students. The web site can be accessed at [www.soesd.k12.or.us](http://www.soesd.k12.or.us).

Computer Information Services maintains the agency's web site and content management system, assists with content development, and develops custom software for the agency's departments and the three-county component school districts.

SOESD "Content Managers" are responsible for updating content on our web site. Content is approved by department heads and administrators. Department heads and administrators

may request they or their staff be assigned as "Content Managers".

Please contact the Computer Information Services Help to request assistance with web services by calling 541-858-6730 / 888-858-6730 or emailing [support@soesd.k12.or.us](mailto:support@soesd.k12.or.us).

### **PERSONAL PROPERTY**

Contact: Business Manager – (541) 776-8590 ext. 1108

Employees are discouraged from bringing personal property to work. An employee's personal property (printer, microwave oven, radio, etc.) brought to the work place is not covered by the ESD's insurance. Those items remain the personal property of employees. In addition, the cost of any loss of or repairs to personal property will be borne by the employee.

### **CONFERENCE ROOM USE**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

The conference rooms in the Medford, Phoenix and Klamath Falls offices of the Southern Oregon ESD are available for use by staff and programs. SOESD has priority use of rooms, which may necessitate canceling meetings if a priority need arises. Conference rooms at the Medford location are also available for use by the public based on a fee schedule. Applications and use guidelines for these rooms are available in the superintendent's office. All conference rooms in Medford, Phoenix and Klamath Falls are scheduled by the superintendent's office (541-776-8590).

After hours use of conference rooms must be sponsored by an administrator in order to provide building security.

### **BUILDING SECURITY**

Contact: Business Office – (541) 776-8590 ext. 1108

The Medford, Phoenix and Klamath Falls ESD buildings have a security system installed. You cannot enter these buildings after hours without setting off the alarms. The security alarm code should be kept confidential. An employee needs to make sure to disable and re-enable when entering/exiting the building.

All visitors must enter by the front office of the building. Employees should not let others into the building who have not checked in with the front office.

## **STUDENTS/CLASSROOM PROCEDURES**

### **VOLUNTEERS**

Contact: Human Resources Office – (541) (541) 776-8590 ext. 1184

Volunteers must meet all seven criteria in order to operate outside of the employment relationship:

1. All placements of volunteers will be approved by the superintendent.
2. All volunteers who work with students will submit to a criminal history check. This check will be paid for by Southern Oregon ESD.
3. The superintendent will ensure that all appropriate training and orientation procedures are followed.
4. The work must be for public service or a humanitarian act.
5. At the volunteer's own initiative.
6. Without any expectation of pay.
7. If the volunteer is an employee for other purposes, the volunteer duties may not be the same as his/her regular work duties.

### **VISITORS IN INSTRUCTIONAL SITES**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

#### **Definitions**

"Instructional site" is defined as any location in which students are receiving specialized instruction or related services by an employee of Southern Oregon ESD.

"Visitor" is defined as any person other than: 1) those providing direct or consultative services to the students, (2) a teacher or administrator affiliated with the instructional site, or (3) an ESD administrator.

#### **Procedures**

To help ensure that student instructional programs are not excessively interrupted, visitors are expected to provide adequate prior notice through prearrangement with the teacher or administrator regarding any anticipated visitation. As necessary, teachers are to inform potential visitors of this prior notice procedure and are expected to notify their immediate administrator before the scheduled visitation occurs.

If instructional plans are such that in the teacher's or administrator's opinion the planned visitation would be too disruptive, the visitation should be scheduled for another day within a reasonable time period.

For instructional sites located in public schools, visitors are expected to check in at the building office prior to visiting the classroom and follow all building procedures. For instructional sites not located in public schools, visitors are expected to check in at the program office affiliated with that instructional site.

If a teacher desires a visitation by any person in an elected office or representative of the media, the teacher must make visitation arrangements through his/her immediate administrator and the office of the superintendent. If any elected official or representative of the media makes a request of a teacher to visit an instructional site, the teacher must inform the person to make any visitation arrangement(s) through his/her immediate administrator and the office of the superintendent.

### **TRANSPORTING STUDENTS**

Contact: Business Office – (541) 776-8590 ext. 1108

The transportation of students is the responsibility of local school districts. ESD staff members are not to transport students in privately owned vehicles with the single exception of an emergency with regard to the safety of the student. The staff member will immediately notify his/her supervisor of that emergency transportation.

If an employee's job requires transporting students in ESD-owned vehicles, or the job description requires a valid Oregon Driver's license, employees will be required to complete a Verification of Valid Oregon Driver's License form at the beginning of each academic year and to report a revocation of a driver's license to the appropriate administrator.

Transporting students in rented vehicles requires that the ESD employee obtain additional insurance through the rental company. The additional insurance must cover these three areas; damage waiver; supplemental liability, and personal accident.

### **FIELD TRIP PROCEDURE**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

#### **Definition**

A field trip is an additional and supplemental activity, which is not part of the regularly scheduled curriculum, conducted at school and community training sites for instruction of IEP goals and objectives. Most field trips are sponsored and conducted by local school districts.

#### **Procedures**

1. The teacher completes and submits a "Field Trip Request" form to the director at least 45 calendar days prior to the planned activity. These forms are available in the program office and in the Administrative Handbook.
2. The director reviews the request with the program administrator. The director decides whether the request complies with educational goals of the students and meets the definition of a field trip. If approved by the director, s/he forwards it to the superintendent at least 30 days prior to the planned activity.
3. The superintendent will review the request and within five working days of receipt will forward to the director and to the teacher 1) an approval of the request, subject to listed requirements attached to the approval, or 2) a denial of the request.
4. Upon approval, a list of participating students and staff will be forwarded to the business manager.

Staff participation and/or assistance with student activities, which are not field trips, is a personal matter and the ESD does not authorize your participation on the agency's behalf. To the extent you participate in such activities, you are doing so at your own risk and responsibility. The Southern Oregon ESD will assume no responsibility.

### **CHILD ABUSE REPORTING**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116  
(See Attachment A-6)

All SOESD employees are mandatory reporters. All staff are required to participate in annual training in the prevention and identification of child abuse and the obligation of reporting. Oregon law recognizes these types of abuse:

- Physical
- Neglect
- Mental Injury
- Threat of harm
- Sexual abuse and sexual exploitation

Employees shall be alert to possible cases of child abuse and shall immediately report these to the legal authorities and inform the program administrator of the report. The Oregon Department of Human Services report phone number for Jackson county is (541) 858 -3197 (or Toll Free: 866-840-2741). A copy of the completed child abuse report must be forwarded to the SOESD superintendent. A child abuse reporting form is provided in this handbook. Child abuse reporting information can be found on the SOESD website at:

[http://www.oregon.gov/dhs/children/pages/abuse/cps/cw\\_branches.aspx#jackson](http://www.oregon.gov/dhs/children/pages/abuse/cps/cw_branches.aspx#jackson)

Failure to report a suspected child abuse or to comply with the confidentiality of records requirements is a violation punishable by law and by district disciplinary action up to and including dismissal.

### **SEXUAL CONDUCT**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

Southern Oregon ESD is committed to providing a learning environment free of all forms of abuse, assault, harassment, and coercive conduct, including sexual misconduct. All employees of SOESD have an obligation to know what sexual conduct is, to discourage it at all times, and to report to supervisors when the employee becomes knowledgeable that such conduct has occurred or is occurring.

"Sexual conduct" means any verbal or physical conduct by a school employee that:

- A. Is sexual in nature;
  - B. Is directed toward a kindergarten through grade 12 student;
  - C. Has the effect of unreasonably interfering with a student's educational performance;
- and

D. Creates an intimidating, hostile or offensive educational environment.

Although not an exhaustive list, examples of sexual conduct are:

1. A student older than second grade sitting on a staff member's lap.
2. Holding hands with a student older than second grade.
3. Staff performing back rubs on a student.
4. Kissing students.
5. Touching students frequently.
6. Commenting on students' bodies or appearance in a sexual manner.
7. Exchanging romantic gifts or communications with a student.
8. Showing pornography and obscene or suggestive photos to the student.
9. Videotaping or photographing a student in revealing or suggestive poses.
10. Discussing/writing about sexual topics unrelated to curriculum with students, making sexual jokes, gestures, pictures and innuendos or engaging in inappropriate banter with students (e.g. discussion of student's dating behavior).
11. Sharing your own sexual exploits or marital difficulties.
12. Intentionally invading the student's privacy (e.g. walking in on him/her in the bathroom intentionally).
13. Going to the student's home without parent supervision.
14. Using email, text messaging, or instant messaging to discuss sexual topics with individual students.
15. Dating student.

Substantiated reports of sexual conduct or child abuse may be released to future employers.

### **STUDENT INSURANCE**

Contact: Business Office – (541) 776-8590 ext. 1121

Each school district provides or makes available student insurance.

## **PLANS REQUIRED BY LAW**

### **ASBESTOS LAW**

Contact: Business Manager – (541) 776-8590 ext. 1108

Asbestos plans are available in the Phoenix and Medford offices. In addition, the business manager has copies of all asbestos plans. Building inspections made at both locations did not show any friable asbestos.

### **BLOODBORNE PATHOGEN EXPOSURE CONTROL**

Contact: Superintendent's Office – (541) 776-8590 ext. 1116

All employees are to complete annually bloodborne pathogen exposure control training. Trainings are provided online and completion is required by October 1 of each year. Southern Oregon ESD pays for the Hepatitis B vaccination series for employees in positions identified as "at risk." The employee is required to sign a consent to have the vaccinations administered, prior to beginning the process. Vaccinations are to be administered through the local health department in which the employee either lives or works. It is the employee's responsibility to call the superintendent's office with the date of each vaccination. If an employee has been identified as being in an "at risk" position, and chooses not to receive the vaccination series, a waiver must be signed by the employee refusing the vaccinations.

Standard precautions are to be followed at all times. Standard precautions require the assumption that staff and students approach infection control as if all direct contact with human blood and body fluids is known to be infectious. Food and Drug Administration (FDA) approved gloves are required for all tasks in which an individual may come into contact with blood or other potentially infectious materials. Immediate, complete and effective hand washing with soap and running water of at least 30 seconds duration should follow any first aid or health care given a student or contact with potentially infectious materials.

### **FIRE EXIT PLAN**

Contact: Business Manager – (541) 776-8590 ext. 1108

Fire exit plans are posted in the Medford, Phoenix, Klamath Falls and Grants Pass buildings. You should familiarize yourself with the plan and the building exits.

### **HAZARDOUS CHEMICAL PLANS**

Contact: Business Manager – (541) 776-8590 ext. 1108

Hazardous chemical plans are available in the Business Office in Medford and in the Special Education Office in Phoenix, Klamath Falls and Grants Pass.

### **LEAD-IN-THE-WATER**

Contact: Business Manager – (541) 776-8590 ext. 1108

Water has been tested at all SOESD buildings. All drinking fountains have been approved.

### **NONDISCRIMINATION (POLICY 5910)**

Contact: Human Resources Office – (541) 776-8590 ext.1184

The district shall promote nondiscrimination and an environment free of harassment based on an individual's race, color, religion, sex, sexual orientation, national origin, disability, marital status or age or because of the race, color, religion, sex, sexual orientation, national origin, disability, marital status or age of any other persons with whom the individual associates.

The district strives to remove any vestige of discrimination in educational opportunities and services offered students and in student discipline.

The superintendent has appointed the Human Resources Manager to contact on staff issues concerning the Americans with Disabilities Act, Section 504 of the Rehabilitation Act of 1973, Title VI, Title VII, Title IX, and other civil rights or discrimination issues.

Complaints regarding the interpretation or application of the ESD's nondiscrimination policy shall be processed in accordance with the following procedures:

#### **Informal Procedure**

Any person who feels that he/she has been discriminated against should discuss the matter with the program administrator, who shall in turn investigate the complaint and respond to the complainant within five school days. If this response is not acceptable to the complainant, he/she may initiate formal procedures. If the program administrator is the subject of the complaint, the individual may file a complaint directly with Human Resources. If the superintendent is the subject of the complaint, the complaint may be filed with the board chairman.

#### **Formal Procedure**

- Step 1: A written complaint must be filed with the program administrator within five school days of receipt of the response to the informal complaint (see Attachment A-4). The program administrator shall further investigate, decide the merits of the complaint and determine the action to be taken, if any, and reply, in writing to the complainant within ten school days.
- Step 2: If the complainant wishes to appeal the decision of the program administrator, he/she may submit a written appeal to the superintendent within five school days after receipt of the program administrator's response to the complaint. The superintendent shall meet with all parties involved, as necessary, make a decision and respond in writing to the complainant within ten school days.



Step 3: If the complainant is not satisfied with the decision of the superintendent, a written appeal may be filed with the board within the five school days of receipt of the superintendent's response to Step 2. In an attempt to resolve the complaint, the board shall meet with the concerned parties and their representative at the next regular or special board meeting. A copy of the board's decision shall be sent to the complainant within ten days of this meeting.

If the complainant is not satisfied after exhausting local complaint procedures, or 90 days, whichever occurs first, he/she may appeal in writing to the Superintendent of Public Instruction.

### **SEXUAL HARASSMENT (POLICY 3930/4930)**

Contact: Human Resources Office – (541) 776-8590 ext.1184

#### **Definition**

Sexual harassment shall include, but not be limited to, unwelcome conduct of a sexual nature that has the purpose or effect of unreasonably interfering with a person's ability to perform his or her job or that creates an intimidating, offensive or hostile work environment, sexual advances, demands or requests for sexual favors and other verbal or physical conduct of a sexual nature by any person when:

1. Submission to the conduct or communication is made either explicitly or implicitly a term or condition of a student's education or participation in district programs or activities or as a condition of employment for staff;
2. Submission to or rejection of the conduct or communication is used as the basis for decisions affecting a student or employment or assignment of staff;
3. The conduct or communication has the purpose or effect of unreasonably interfering with a student's educational performance or with an employee's ability to perform his/her job;
4. The conduct or communication has the effect of creating an intimidating, offensive or hostile educational or working environment;
5. The conduct or communication has the purpose or effect of demanding sexual favors in exchange for benefits.

All complaints about behavior that may violate this policy shall be promptly investigated. Any student or employee who has knowledge of or feels he/she is a victim of sexual harassment must immediately report his/her concerns to the immediate supervisor or superintendent. The student and the student's parents or staff member who initiated the complaint shall be notified when the investigation is concluded.

The initiation of a complaint in good faith about behavior that may violate this policy shall not adversely affect the educational assignments or student environment of a student complainant or any terms or conditions of employment or work environment of the staff complainant. There shall be no retaliation by the district against any person who, in good faith, reports sexual harassment.

Students shall be subject to discipline up to and including expulsion. Employees shall be subject to discipline, up to and including dismissal. Other individuals whose behavior is found to be in violation of this policy shall be subject to appropriate sanctions as determined and imposed by the superintendent or board.

The district may report individuals in violation of this policy to law enforcement officials. Licensed staff and those participating in practicum programs as specified by Oregon Administrative Rules shall be reported to the Teacher Standards and Practices Commission.

The superintendent shall ensure appropriate training is provided to all supervisors, staff and students. This policy as well as the complaint procedure will be made available to all students, parents of students and staff. The district's policy shall be posted in all offices. Such posting shall be by a sign of at least 8.5 by 11 inches.

All staff and students shall be subject to this policy.

### **Sexual Harassment Complaint Procedures**

The superintendent has responsibility for investigations concerning sexual harassment. The investigator shall be a neutral party having had no involvement in the complaint presented.

- Step 1 Any sexual harassment complaint shall be presented to the superintendent. All such complaints shall be reduced to writing and will include the specific nature of the sexual harassment and corresponding dates (see Attachment A-17).
- Step 2 After receiving the complaint, the superintendent or designee shall promptly initiate an investigation. He/she will arrange such meetings as may be necessary to discuss the complaint with all concerned parties within five working days after receipt of the complaint. All findings of the investigation, including the response of the alleged harasser, shall be reduced to writing. The superintendent or his/her designee conducting the investigation shall notify the complainant in writing when the investigation is concluded.

A copy of the notification letter, together with any other documentation related to the sexual harassment incident, will be forwarded to the superintendent.

- Step 3 If the complainant is not satisfied with the superintendent's or designee's decision, a written appeal may be filed with the board within ten working days after receipt of the Step 3 decision. The board shall, within twenty working days, conduct a

hearing at which time the complainant shall be given an opportunity to present the appeal. The board shall provide a written decision to the complainant within ten working days following completion of the hearing.

- Step 4 If the complaint is not satisfactorily settled, the employee may appeal to the U. S. Department of Labor, Equal Employment Opportunity Commission or Oregon Bureau of Labor and Industry; the student may appeal to the Regional Civil Rights Director, U.S. Department of Education, Office for Civil Rights, Region X, 915 2nd Avenue, Room 3310, Seattle, WA 98174-1099.

All documentation related to sexual harassment complaints may become part of the student's education record or employee's personnel file as appropriate. Additionally, a copy of all sexual harassment complaints and documentation will be maintained as a confidential file and stored in the district office.

The superintendent shall report the name of any person holding a teaching license or participating in a practicum under OAR 584-015-0070 or 584-016-1075 when, after appropriate investigation, there is reasonable cause to believe the person may have committed an act of sexual harassment. Reports shall be made to the Teacher Standards and Practices Commission within 30 days of such a finding. Sexual contact with a student shall also be considered a reportable offense. In the event the superintendent is the subject of the investigation, reports, when required, shall be made by the board chairman.

### **COPYRIGHT LAW**

Contact: Instructional Materials Specialist – (541) 776-8590 ext. 1134

The Copyright Law attempts to balance the protection of the rights of the author with the needs of society. Even though the author or creator is given certain specific rights under Section 106 of the law, Section 107 begins to set some limitations on those rights followed, in other sections, by specific exemptions granted for particular situations.

"Fair Use" Exemptions for educators are outlined in general guidelines that are available in print or electronically on the Internet. The Media Materials Library has several resources available for assistance in determining copyright guidelines.

## **MATERIALS SELECTION AND AVAILABILITY**

### **MEDIA REQUESTS/BOOKING**

Contact: Media Library Booking Desk – (541) 776-8590 ext. 1134

Technology and Media Services provides instructional materials (DVDs, kits, models and digital resources) to local public school districts. These items may be requested by calling the Media Library booking department at 541-776-8590 ext. 1134 or 800-460-6454, coming in during regular hours (Monday – Friday, 7:30 AM – 4:30 PM), or by using our online booking system (<http://media.soesd.k12.or.us>).

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SOUTHERN OREGON ESD  
**ABSENCE REPORT**

Employee Name \_\_\_\_\_

Date of Absence	Time Lost In Hours	Type of Absence	FMLA	OFLA	OFLA/Sick Child	Work Comp
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Vacation \_\_\_\_\_ Sick Leave \_\_\_\_\_ Personal \_\_\_\_\_ Discretionary \_\_\_\_\_

Bereavement \_\_\_\_\_ Duty \_\_\_\_\_ Association \_\_\_\_\_ Dock \_\_\_\_\_

Donation to Sick Leave Bank:  
☐ Sick Leave \_\_\_\_\_  
☐ Personal Leave \_\_\_\_\_  
☐ Discretionary Leave \_\_\_\_\_

Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

2/2018

WHITE COPY - PERSONNEL

YELLOW COPY - EMPLOYEE

PINK COPY - SUPERVISOR

### SOESD Asset Inventory

List  new record

Tag #  preview  print

Vendor

PO #  Date  Today's Date

New ☐ Transfer ☐ Date Received

Retag ☐ Delete ☐

Description

Price  Model #

Serial #

Program  Bldg

Room  Class Code

Account #

Previous Location

Print your name

Old Tag #  old tag here

Note or reason for delete

### SOESD Asset Inventory

List  new record

Tag #  preview  print

Vendor

PO #  Date  Today's Date

New ☐ Transfer ☐ Date Received

Retag ☐ Delete ☐

Description

Price  Model #

Serial #

Program  Bldg

Room  Class Code

Account #

Previous Location

Print your name

Old Tag #  old tag here

Note or reason for delete

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List  new record

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New ☐ Transfer ☐ Date Received

Retag ☐ Delete ☐

Description

Price  Model #

Serial #

Program  Bldg

Room  Class Code

Account #

Previous Location

Print your name

Old Tag #  old tag here

Note or reason for delete

### SOESD Asset Inventory

List  new record

Tag #  preview  print

Vendor

PO #  Date  Today's Date

New ☐ Transfer ☐ Date Received

Retag ☐ Delete ☐

Description

Price  Model #

Serial #

Program  Bldg

Room  Class Code

Account #

Previous Location

Print your name

Old Tag #  old tag here

Note or reason for delete



**SOUTHERN OREGON ESD  
CHILD ABUSE REPORT FORM**

ORS 419B.010 requires that any public or private official having reasonable cause to believe that any child with whom the official comes in contact has suffered abuse or that any person with whom the official comes in contact has abused a child shall immediately report or cause a report to be made in the manner required in ORS 419B.015."

DIRECTIONS: (1) Complete all information in Part A; (2) Complete Part B when report is made and contact supervisor of the report; (3) Send a copy of the report to the SOESD superintendent and the building principal.

<b>PART A</b>					
ALLEGED VICTIM: Interpreter Needed <input type="checkbox"/> Yes <input type="checkbox"/> No Type _____ Disability: _____					
_____ LAST NAME	_____ FIRST	_____ MI	_____ AGE	_____ DATE OF BIRTH	<input type="checkbox"/> Male <input type="checkbox"/> Female
_____ SCHOOL			_____ GRADE		
PARENT/GUARDIAN: _____					
_____ LAST NAME		_____ FIRST NAME		_____ MI	
_____ ADDRESS/CITY/ZIP CODE				_____ PHONE	
Nature and extent of the alleged abuse: _____ _____					
Date and time of alleged abuse: _____					
Evidence of any previous abuse: _____ _____					
Explanation given for the abuse: _____ _____					
Identity of alleged perpetrator (if known): _____					
Other pertinent information concerning the alleged abuse: _____ _____					
INFORMATION GATHERED BY: Name _____ Position _____					
(SIGNATURE)					
Date _____		Time _____			

<b>PART B</b>		
REPORTED TO: (Indicate which agency)		
<b>State Office for Child Welfare Involvement:</b>		
Date _____	Time _____	County _____
Name of Contact at SCF _____		
<b>Law Enforcement Agency Involvement:</b>		
Date _____	Time _____	County _____
Officer's Name _____		
Child taken into protective custody from school: <input type="checkbox"/> Yes <input type="checkbox"/> No		
_____ SIGNATURE OF LAW ENFORCEMENT AGENCY/CPS AGENT TAKING CHILD		
Employee who made call: _____		_____ (DATE)
(SIGNATURE)		

**DO NOT FILE IN CHILD'S SCHOOL RECORD**

Copies to: Southern Oregon ESD Superintendent and Attending School Building Principal

**Southern Oregon ESD Complaint Form**

Name of Person Filing Complaint: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Mailing Address: \_\_\_\_\_

Date of Incident: \_\_\_\_\_ Date Complaint Filed: \_\_\_\_\_

Location or Activity: \_\_\_\_\_

Student/Parent ☐ Employee ☐ Non-employee ☐

Specific complaint: (Please provide detailed information including names, dates, places, activities, and results of informal discussion. If additional space is required, use back of form.)

Remedy requested:

*The completed complaint form should be submitted to the program administrator.*

## COMPUTER, NETWORK, AND INTERNET USE AGREEMENT

Acceptable uses of SOESD computers, network, and Internet connection are activities that support teaching and learning and should be considered a privilege and not a right. Inappropriate use may result in a cancellation of those privileges.

### Inappropriate uses include the following:

- Violating the rights or privacy of others.
- Using or posting profanity, obscenity, or language that may be offensive to another user.
- Posting confidential communications without the author's prior consent.
- Copying software in violation of copyright law.
- Using the network for financial gain or for any commercial or illegal activity.
- Storing non-work related photos, music or other files on computers / network resources.
- Deliberate attempts to degrade or disrupt system or network performance. Such attempts will be viewed as criminal activity under applicable state and federal law.
- Intentionally spreading computer viruses.

### General User Responsibilities

- The person in whose name an account is issued is responsible at all times for its proper use and adherence to copyright laws, board policies, and personal and agency liability.
- Southern Oregon ESD reserves the right to monitor or examine all computer and network activities including electronic mail, internet activity, and the content of computer hard drives.
- ***Note: Electronic information including email is not confidential and is subject to public disclosure.***
- Security on a computer system is high priority, especially when the system involves many users. Users identifying a security problem are to notify Computer Information Services.\*
- Licensed software is to be installed by Computer Information Services.\*
- The user who installs freeware takes the responsibility to check for incompatibility problems prior to installation. Contact Computer Information Services with any questions regarding compatibility.\*

### Personal / Mobile Devices

- Personal and mobile devices will be configured according to current procedures set by Computer Information Services before being used to access SOESD related information resources or other resources that may contain confidential data, (including but not limited to connecting to email, student information systems, and personnel records). For current configuration procedures and usage guidelines, and to request configuration of a device, contact Computer Information Services.\*
- SOESD may erase the entire contents of mobile devices (including personal mobile devices) at any time, manually or remotely. SOESD will not be liable for any claim resulting from such data loss.

### Consequences

- If it is found that a computer contains non-work related software or files, or software or files in violation of copyright laws and/or agency policy, or that a user has repeatedly caused disruption to the performance of the system or network, even if such disruption is unintentional, offending files/software may be removed or the entire drive/user storage area may be erased, the user's account privileges may be changed to exclude the ability to download/install software, and the appropriate administrator may be notified.
- Any user identified as a security risk or having a history of problems with other computer systems may be denied access.
- Failure to adhere to these guidelines may result in suspending or revoking the offender's privilege to computer and network access.

\*Contact the Computer Information Services Help Desk by calling 541-858-6730 / 866-858-6730, emailing [support@soesd.k12.or.us](mailto:support@soesd.k12.or.us), or requesting help online: [www.soesd.k12.or.us/helpdesk](http://www.soesd.k12.or.us/helpdesk).

## COMPUTER, NETWORK, AND INTERNET USE AGREEMENT SIGNATURES

### *Employee Section*

By signing this form, I am stating that I have read and understand Southern Oregon ESD's "Computer Network, and Internet Use Agreement" and agree to comply with the policies procedures as stated in the agreement, as well as SOESD Board policies 7500 and 8700 regarding Computer Use and Internet Safety. Further, I acknowledge that after signing this form, I will receive training on and be responsible for educating minors about appropriate online behavior, including interacting with other individuals on social networking websites and in chat rooms, and cyberbullying.

Printed Name of Employee \_\_\_\_\_

Program \_\_\_\_\_

Work Site \_\_\_\_\_

Position \_\_\_\_\_

Signature of Employee \_\_\_\_\_ Date \_\_\_\_\_

Authorized by:

Signature of Supervisor \_\_\_\_\_ Date \_\_\_\_\_

Preferred Email Address \_\_\_\_\_

First Name \_\_\_\_\_ Last Name \_\_\_\_\_ @soesd.k12.or.us

### *Student Section*

- I have read the Computer, Network, and Internet Use Agreement and have received training appropriate online behavior, including the proper use of the computer / network / Internet, interacting with other individuals on social networking websites and in chat rooms, and cyberbullying. I agree to support these policies and procedures, and understand that violation may result in disciplinary action, as well as restitution of any costs that may incur, intentional or otherwise.
- For personal safety I will not post personal contact information about myself or others. Personal contact information includes address, telephone number, photograph, etc. I will promptly disclose to an ESD employee any message that I receive that is inappropriate or makes me feel uncomfortable.
- I will not download information or software without express permission from the teacher.
- I will ask permission prior to posting any content online.
- I will not change the system configuration without permission.

Printed Name of Student \_\_\_\_\_

Signature of Student \_\_\_\_\_

Date \_\_\_\_\_

### *Parent/Legal Guardian Section*

I have read the Computer, Network, and Internet Use Agreement and agree to the conditions outlined in that document. I understand that these telecommunications services are of a public adult nature, and that there is some information that may not be appropriate for certain ages. I fully understand that my child (the actual technology user) is responsible for his or her actions in dealing with telecommunications access privileges.

My child and I agree to abide by the Southern Oregon ESD's Computer, Network, and Internet Use Agreement and acknowledge that failure to comply may result in loss of system privileges and/or disciplinary action.

Printed Name of Parent/Legal Guardian \_\_\_\_\_

Signature of Parent/Legal Guardian \_\_\_\_\_

Date \_\_\_\_\_

Updated 8-15-2013 v3



Medford Office  
Administration  
Business Services  
School Improvement  
Technology & Media  
101 North Grape Street  
Medford, Oregon 97501  
(541) 776-8590  
Fax: (541) 779-2018

Phoenix Office  
Special Education  
Migrant Ed/ELL  
5465 S. Pacific Hwy.  
Phoenix, OR 97535  
(541) 776-8555  
Fax: (541) 535-2460

Grants Pass Office  
Special Education  
409 N.W. 3rd  
Grants Pass, OR 97526  
(541) 479-5135  
Fax: (541) 472-0054

Early Childhood  
Services  
Gilbert Creek Child Dev. Ctr.  
1021 N.W. Highland  
Grants Pass, OR 97526  
(541) 956-2059  
Fax: (541) 956-1704

Klamath Falls Office  
Special Education  
Career & Technical Ed  
Migrant Ed/ELL  
485 S. Alameda  
Klamath Falls, OR 97603  
(541) 850-1133  
Fax: (541) 850-1140

## ETHICS DISCLOSURE FOR USE OF PERSONAL DEBIT CARD / CREDIT CARD FOR AGENCY PURCHASES

I, \_\_\_\_\_, recognize my obligation, as a public employee, to follow the requirements of ORS 244 which mandates that public employees receive no additional benefit from their public employment. I attest to the fact that I receive no personal benefit or financial gain by using my personal debit card or credit card for agency purchases. I understand that all personal credit cards and debit cards I use for agency purchases, are subject to this ORS requirement.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

# **EMPLOYEE REQUEST TO ATTEND INSERVICE/CONFERENCE/WORKSHOP**

## **STAFF PERSON COMPLETES THIS SECTION:**

1. Name \_\_\_\_\_ Today's Date \_\_\_\_\_
2. Workshop Information: Title \_\_\_\_\_  
Date(s) \_\_\_\_\_ Place \_\_\_\_\_  
Other ESD staff attending \_\_\_\_\_
3. Estimated primary costs: Account Code: \_\_\_\_\_  
Funding Source: \_\_\_\_\_  
Registration Fee (attach form) = \$ \_\_\_\_\_  
Airfare (if applicable) = \$ \_\_\_\_\_  
Car: (Circle One): Rental / ESD / Personal / Other = \$ \_\_\_\_\_  
Lodging: (# of nights \_\_\_\_\_ @ \$ \_\_\_\_\_ including taxes) = \$ \_\_\_\_\_  
Meals: (# Breakfasts \_\_\_\_\_ @ \_\_\_\_\_ # Lunches \_\_\_\_\_ @ \_\_\_\_\_ # Dinners \_\_\_\_\_ @ \_\_\_\_\_) = \$ \_\_\_\_\_  
Other (parking, shuttle, taxi, fuel, etc.) = \$ \_\_\_\_\_  
Total primary costs: = \$ \_\_\_\_\_
4. Related costs:  
Substitute # days \_\_\_\_\_ @ \$ \_\_\_\_\_ = \$ \_\_\_\_\_  
Other \_\_\_\_\_ = \$ \_\_\_\_\_  
Total related costs: = \$ \_\_\_\_\_
5. TOTAL EXPECTED COSTS PER PERSON = \$ \_\_\_\_\_
6. Type of leave requested:  
Licensed Employee Classified Employee  
☐ Duty *(Please see administrator)*  
☐ Personal  
☐ Unpaid
7. Impact on classroom/service to students during absence of staff member: \_\_\_\_\_
8. Previous inservice(s) attended in last two years (include number of days): \_\_\_\_\_
9. Relevance to assigned student population is: \_\_\_\_\_
10. Is this training mission critical to SOESD? \_\_\_\_ Yes \_\_\_\_ No  
Please Explain (use reverse side if needed): \_\_\_\_\_
11. Are we obtaining the information from this training in a manner that is maximally efficient?  
\_\_\_\_ Yes \_\_\_\_ No  
Please Explain (use reverse side if needed): \_\_\_\_\_
12. Are we maximizing the impact of the training once someone has gone and returned? \_\_\_\_ Yes \_\_\_\_ No  
How are we sharing key learnings with key parts of the SOESD community? (use reverse side if needed)  
\_\_\_\_\_  
\_\_\_\_\_

Employee's Signature \_\_\_\_\_ Program \_\_\_\_\_

## **SUPERVISOR COMPLETES THIS SECTION:**

Need for program to have staff expertise in this area/topic is:

For Administrator Use Only  
(circle one)

1 2 3  
(low) (average) (high)

Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

☐ Approved ☐ Disapproved ☐ Staff Notified Date Notified \_\_\_\_\_

Director's Signature \_\_\_\_\_ Date \_\_\_\_\_

Superintendent's Signature \_\_\_\_\_ Date \_\_\_\_\_

9/2009

(out of state only)

**IN SERVICE AREA TRAVEL REIMBURSEMENT**

<b>Vendor #</b>	<b>Fund</b>	<b>Function</b>	<b>Object</b>	<b>Location</b>	<b>Area</b>	<b>Date Today</b>
Cue	100	- 2520	- 341	- 101	-	8/28/2018
<b>Last Name</b>	<b>First Name</b>	<b>Street Address</b>				
SOESD/Phoenix	14	Central Point OR 97502				
<b>Primary Work Location</b>	<b>Commute (1W)</b>	<b>City</b>	<b>State Zip</b>			

<b>Total Mileage</b>	<u>33</u>
<b>Total Mileage Reimb. @ \$.545/mi</b>	<u>\$17.99</u>
<b>Total Meals Reimbursement</b>	
<b>Total Reimbursement</b>	<u>\$17.99</u>

**Account Codes / Notes**

Date	Departure Location	Travel Destination	Purpose	Round Trip or One Way	Miles Driven	Meal (B,L,D)	Meal Amount
7/20/2018	SOESD Phoenix	Griffin Creek Elem	Meeting	⊙ RT ○ 1W	8		
7/21/2018	Home	Griffin Creek Elem	Meeting	○ RT ⊙ 1W	8		
	Griffin Creek Elem	Central Point Elem	Meeting	○ RT ⊙ 1W	9		
	Central Point Elem	Hanby Middle School	Meeting	○ RT ⊙ 1W	10		
	Handby Middle School	Jewett Elementary	Meeting	○ RT ⊙ 1W	10		
	Jewett Elementary	Home	Return home	○ RT ⊙ 1W	1		
	Adjust for round-trip home commute			○ RT ○ 1W	-28		
7/22/2018	Home	Griffin Creek Elementary	Meeting	○ RT ⊙ 1W	8		
	Griffin Creek Elementary	Central Point Elementary	Meeting	○ RT ⊙ 1W	9		
	Central Point Elementary	SOESD Phoenix	Return to office	○ RT ⊙ 1W	12		
	Adjust for one-way commute			○ RT ○ 1W	-14		
<b>Subtotals</b>					<u>33</u>		

**PAID**

**Date Paid** \_\_\_\_\_  
**ESD Check #** \_\_\_\_\_

2018 [v1.2k18]  
Revised 12/18/2017

**PAYMENT/PURCHASE AUTHORIZED BY**

**Claimant** Barbie Cue **DATE** 8/1/2018  
**Supervisor** \_\_\_\_\_  
**Supervisor** \_\_\_\_\_

## GRANT PROPOSAL CHECKLIST

### Step 1 - Intent

- ☐ Discuss with director the feasibility and SOESD in-kind requirements.
- ☐ Discuss with business manager the indirect cost charges.
- ☐ Submit completed “Intent to Submit Proposal for Grant Funding” to director for approval.
- ☐ Submit director approved “Intent to Submit Proposal for Grant Funding” to the superintendent’s office.
- ☐ The superintendent’s office will submit the intent to the business manager for review and initials
- ☐ The business manager will submit the intent to the superintendent for review and signature.
- ☐ The superintendent will approve or deny the intent.
- ☐ The superintendent signed intent giving approval or denial is returned to the grant writer.

*NOTE: If this is a competitive grant, a notice will be sent by the superintendent’s office to all departments providing notification of the intent. If there are no in-house competing grants identified within two weeks, the proposal will be approved to proceed by signature of the superintendent.*

### Step 2 – Grant Proposal

- ☐ Written grant is submitted to the director for approval.
- ☐ Written grant is submitted to the superintendent’s office.
- ☐ The superintendent’s office will submit the grant to the business manager for review and initials.
- ☐ The business manager will submit the grant to the superintendent for review and signature.
- ☐ The superintendent will return the approved or rejected grant application to the grant writer.

### Step 3 – Grant Award/Contract

- ☐ If grant is awarded, the grant writer will submit an expenditure budget to the business manager using agency budget coding.
- ☐ If a contract is associated with the grant award, the agency awarding the grant must sign first.
- ☐ Contract is submitted to the director for review and initials.
- ☐ Contract is submitted to the superintendent’s office.
- ☐ The superintendent’s office will submit the contract to the business manager for review and initials.
- ☐ The business manager will submit the contract to the superintendent for review and signature.
- ☐ The superintendent will approve by signature the contract.
- ☐ A fully executed contract is scanned by the superintendent’s office and forwarded to the business manager and the grant writer.
- ☐ A fully executed contract is mailed by the superintendent’s office to the granting agency with a signed original maintained in the contract file in the business office.



# SOUTHERN OREGON ESD

## INTENT TO SUBMIT PROPOSAL FOR GRANT FUNDING

If you intend to write a grant, you must submit this form to the program director as soon as you have identified the potential grantor. Once the program director has given approval to proceed, this form is to be submitted to the superintendent for approval. A notice to all departments will be generated notifying of the intent. If it is a competitive grant and there are no in-house competing grants identified within two weeks, the proposal will proceed by signature of the Superintendent. If there are questions, please contact the superintendent's office – (541) 776-8591.

Date	<b>Competitive Grant</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
If competitive grant, does grantor award more than one grant to an individual agency.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Department	
Principal Investigator/Project Director	
Telephone/email	
Project Title and Brief Description	
Agency/Foundation for Submission	
Agency/Foundation Funding Cycle	
Date for Submission	
Deadline for Submission	
Approximate Amount to be Requested	
SOESD Resource Commitment	

Please attach a copy of the RFP if available.

Clearance to apply designated by signature below.

\_\_\_\_\_  
SOESD Program Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
SOESD Superintendent

\_\_\_\_\_  
Date

5/12/2012

**OUT OF SERVICE AREA TRAVEL REIMBURSEMENT**

<b>Vendor #</b>	100 - 2520 - 342 - 101 -	<b>Date Today</b>	8/28/2018
<b>Cue</b>	Barbie	<b>Object Location Area</b>	101 Edwina Ave.
<b>Last Name</b>	<b>First Name</b>	<b>Street Address</b>	
SOESD Phoenix	14	Central Point	OR 97502
<b>Primary Work Location</b>	<b>Commute (1W)</b>	<b>City</b>	<b>State Zip</b>

<b>REASON FOR TRAVEL</b>
Travel to Redmond, Oregon to attend the 2018 Summer OASBO Conference July 26-28, 2018 at Eagle Crest Resort

TRANSPORTATION INFORMATION				
Date of Travel	Type of Transportation	Departure Location	Travel Destination	# Miles Driven
7/26/2018	Personal Car	Home	Eagle Crest Resort	188
			1522 Cline Falls Way	
			Redmond, Oregon	
7/28/2018	Personal Car	1522 Cline FallsWay, Redmond	Home	188
		Adjust for RT from home		-28

ADDITIONAL EXPENSES					
Date	Meal (B,L,D)	Meal Amount	Lodging Location	Lodging Amount	Other Expense
7/26/2018	D	\$16.00	Prepaid		
7/27/2018	BLD	\$30.00			
7/28/2018	BL	\$14.00			

<b>Total Mileage</b>	348
<b>Mileage Reimbursement @ \$.545/mi</b>	\$189.66
<b>Total Lodging</b>	
<b>Total Meals</b>	\$60.00
<b>Total Other</b>	
<b>Total Claim</b>	\$249.66

<b>PAID</b>	<b>PAYMENT/PURCHASE AUTHORIZED BY</b>	<b>DATE</b>
<b>Date Paid</b>	<b>Claimant</b> <i>Barbie Cue</i>	<i>7/2/2018</i>
<b>ESD Check #</b>	<b>Prior Approval</b>	
2018 [v1.2k18] Revised 12/18/2017	<b>Final Approval</b>	

<b>Payroll Schedule 2018-2019</b>			
<b>Month</b>	<b>Due to Dept AA</b>	<b>Due to Payroll</b>	<b>Payday*</b>
<b>July</b>	6th	10th	20th
<b>August</b>	6th	10th	20th
<b>September</b>	6th	10th	20th
<b>October</b>	8th	11th	19th
<b>November</b>	6th	9th	20th
<b>December</b>	6th	10th	20th
<b>January</b>	7th	10th	22nd
<b>February</b>	6th	11th	20th
<b>March</b>	8th	10th	20th
<b>April</b>	8th	10th	19th
<b>May</b>	6th	10th	20th
<b>June - 1st check - academic</b>		4th	7th
<b>June 2nd check - academic</b>		5th	10th
<b>June</b>	6th	10th	20th
<i>*If checks are mailed and not received by payday, employees must wait five business days from the pay date before SOESD will re-issue a check.</i>			
<b>This is the schedule for regular SOESD employees and personal service agreements only -  Substitutes will follow the sub payroll schedule.</b>			
<i>Please remember - all timesheets must be received by the  program administrative assistant by the cutoff date  to insure paychecks will be ready on time.  Late timesheets will be processed the following month.</i>			

REQUEST FOR FAMILY AND MEDICAL LEAVE  
Employee Request for Family and Medical Leave (FMLA)  
and/or Oregon Family Leave (OFLA)

Where the need for leave may be anticipated, written request for family and medical leave must be made. If practical, request is to be made at least 30 days prior to the date the leave is to begin. Failure to request leave in a timely manner could result in either the leave being postponed or the amount of leave available reduced up to three weeks.

Name \_\_\_\_\_ Effective date of the leave \_\_\_\_\_

Program \_\_\_\_\_ Position \_\_\_\_\_

Status:        ☐ Full Time        ☐ Part Time        ☐ Temporary

Hire Date \_\_\_\_\_ Length of Service \_\_\_\_\_

I request family or medical leave for one or more of the following reasons:

(A physician's certification may be required to support a request for family and medical leave. In addition, a fitness-for-duty certification may be required before reinstatement following the leave.)

☐ 1. Because of the birth of my child and in order to care for him or her.

Expected date of birth \_\_\_\_\_ Leave to start \_\_\_\_\_  
Expected return date \_\_\_\_\_

☐ 2. Because of the placement of a child with me for adoption or foster care.

Age of child \_\_\_\_\_ Date of placement \_\_\_\_\_  
Leave to start \_\_\_\_\_ Expected return date \_\_\_\_\_

☐ 3. In order to care for my spouse, same sex domestic partner, child, parent, or parent-in-law with a serious health condition.

Leave to start \_\_\_\_\_ Expected return date \_\_\_\_\_

Please check one:        ☐ Spouse    ☐ Child    ☐ Parent (FMLA and OFLA)

Please check one:        ☐ Same sex domestic partner (OFLA only)  
                                 ☐ Same sex domestic partner's child (OFLA only)  
                                 ☐ Same sex domestic partner's parent (OFLA only)  
                                 ☐ Parent-in-law (OFLA only)  
                                 ☐ Grandparent (OFLA only)  
                                 ☐ Grandchild (OFLA only)

Please state name and address of relation: \_\_\_\_\_  
\_\_\_\_\_

Describe serious health condition \_\_\_\_\_  
\_\_\_\_\_

- ☐ 4. For a serious health condition which prevents me from performing my job functions.  
Describe \_\_\_\_\_

Leave to start \_\_\_\_\_ Expected return date \_\_\_\_\_

Regarding 3 or 4 above, if applicable, please request an intermittent (reduced workday hours) or reduced leave (fewer work days each work week) schedule (subject to employer's approval). Please describe schedule of when you anticipate you will be unavailable to work.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- ☐ 5. In order to care for a child with a condition requiring home care, which does not meet the definition of serious health condition and is not life threatening or terminal (OFLA leave only).

I understand that I am required to use any accrued paid leave - sick leave, personal leave or accrued vacation leave – concurrently with FMLA/OFLA until paid leave is exhausted, before taking a portion (if any) of family and medical leave without pay. I may select the order in which the paid leave is used for the family and medical leave. My preference as to order in which the paid leave is used is noted below:

\_\_\_\_\_  
\_\_\_\_\_

If my request for leave is approved, it is my understanding that without an authorized extension when the need for an extension could be anticipated, I must report to duty on the first work day following the date my leave is scheduled to end. I understand that failure to do so will constitute notice of my intent not to return to work and the district may terminate my employment.

I authorize the district to deduct from my paychecks any employee contributions for health insurance premiums which remain unpaid after my leave, consistent with state and/or federal law.

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date

*Submit completed form to the Superintendent's Office, Southern Oregon ESD, 101 North Grape Street, Medford, OR 97501*

FMLA Employee Request  
6/22/2004



SOUTHERN OREGON  
EDUCATION SERVICE DISTRICT

## Safety Concern

Use this form to report non-emergency health and safety concerns to the safety committee

### Medford Office

Administration  
Business Services  
School Improvement  
Technology & Media  
101 North Grape Street  
Medford, Oregon 97501  
(541) 776-8590  
Fax (541) 779-2018

### Phoenix Office

Special Education  
Migrant Ed/ELL  
5465 S. Pacific Hwy.  
Phoenix, OR 97535  
(541) 776-8555  
Fax (541) 535-2480

### Grants Pass Office

Special Education  
409 N.W. 3rd  
Grants Pass, OR 97526  
(541) 479-5135  
Fax (541) 472-0054

### Early Childhood Services

Gilbert Creek Child Dev. Ctr.  
1021 N.W. Highland  
Grants Pass, OR 97526  
(541) 956-2059  
Fax (541) 956-1704

### Klamath Falls Office

Special Education  
Career & Technical Ed  
Migrant Ed/ELL  
2685 Foothills Blvd.  
Klamath Falls, OR 97603  
(541) 850-1138  
Fax (541) 850-1140

Name: \_\_\_\_\_

Department: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Incident or Finding: \_\_\_\_\_

Time of Incident or Finding: \_\_\_\_\_

Where (be specific):

---

---

---

---

What is the concern?

---

---

---

---

What changes do you recommend to correct the concern?

---

---

---

---

#### For Committee Use:

Person assigned to respond: \_\_\_\_\_

Action taken:

---

---

---

---

Date Committee Reviewed: \_\_\_\_\_

Submit completed form to Dan Weaver, SOESD Business Manager and Safety Officer.

*"The Regional Advantage"*  
Serving Jackson, Josephine and Klamath County Schools

## SEXUAL HARASSMENT COMPLAINT FORM

Name of complainant: \_\_\_\_\_

Position of complainant: \_\_\_\_\_

Date of complaint: \_\_\_\_\_

Name of alleged harasser: \_\_\_\_\_

Date and place of incident or incidents: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name of witnesses (if any): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Evidence of sexual harassment, i.e., letters, photos, etc. (attach evidence if possible):

\_\_\_\_\_

\_\_\_\_\_

Any other information: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I agree that all of the information on this form is accurate and true to the best of my knowledge.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Southern Oregon ESD  
101 N. Grape Street  
Medford, OR 97501

SICK LEAVE BANK APPLICATION

Employee

Employee Name \_\_\_\_\_ Date of Hire \_\_\_\_\_  
Program \_\_\_\_\_

Qualifying Absence: ☐ Employee illness/injury  
☐ Care for immediate family member who has suffered an illness/injury  
(Immediate family is defined as spouse, child, parent, grandparent, grandchild, son or daughter-in-law,  
father- or mother-in-law, brother, sister, brother- or sister-in-law, and any other person living in the  
home.)

Please circle one.

First day absence began/will begin because of this condition: \_\_\_\_\_

\*\*Time period for which sick leave is being requested: \_\_\_\_\_ Date \_\_\_\_\_  
\_\_\_\_\_ to \_\_\_\_\_  
Date Date

**\*\*Note:** The first 10 working days of absence is the responsibility of the employee and can be covered by sick leave, personal leave and vacation (if applicable) or a dock if the employee does not have enough available appropriate leave to cover the first 10 working days. On the 11<sup>th</sup> working day the sick leave bank will begin or after all available appropriate leave has been exhausted.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

Physician

Physician's Name \_\_\_\_\_ Date of Visit \_\_\_\_\_

I estimate that the above name employee will be "off the job" for \_\_\_\_\_ work days because of

☐ Illness/Injury ☐ Care for immediate family member who has suffered an illness/injury.

Diagnosis: \_\_\_\_\_

\_\_\_\_\_  
Physician's Signature

\_\_\_\_\_  
Date

The status of your application for access to the Sick Leave Bank is as follows:

☐ Approved ☐ Denied Reason for denial: \_\_\_\_\_

E.S.D.

Based on your physician's estimate of required leave, it has been determined that your use of the sick leave bank will begin \_\_\_\_\_ and continue through \_\_\_\_\_. We anticipate that you will return to work on \_\_\_\_\_. Maximum total hours to be used during this leave is \_\_\_\_\_. If circumstances change and you return to work earlier or are unable to return to work, please contact the superintendent's office immediately.

\_\_\_\_\_  
Superintendent's Signature

\_\_\_\_\_  
Date

Original - Medical File  
Copy - Employee

7/2006