Ashland School Board Thursday, February 8, 2024 7:00 PM Ashland City Council Chamber 1175 East Main Street Ashland, OR 97520

Agenda

- 1. Call to Order and Roll Check
- Presenter: Board Vice Chair Jill Franko
- 2. Land Acknowledgment
- Presenter: Board Vice Chair Jill Franko
- 3. Adoption of Agenda (At this time Board members are provided the opportunity to

amend the Regular Session agenda.)

Presenter: Board Vice Chair Jill Franko

- 4. Consent Agenda (All items may be adopted by a single motion unless pulled for special
- consideration.)

Presenter: Board Vice Chair Jill Franko

A. <u>Approval of Minutes</u>	<u>5</u>
B. <u>Personnel Report for February 2024</u>	<u>20</u>
C. Enrollment Report for February 2, 2024	<u>22</u>
D. <u>Southern Oregon Educational Service District (SOESD) Annual</u>	<u>24</u>
<u>Service Plan</u>	
E. Ashland School District Integrated Pest Management Report for	<u>60</u>
<u>2024</u>	
F. Board Policy Update: IGBI Bilingual Education	<u>79</u>
G. <u>Board Policy Update: IFE Curriculum Guides and Course Outlines</u>	<u>80</u>
5. School Report - Walker Elementary 15 minutes	81

Presenter: Walker Elementary Principal Tiffany Burns

6. Recurring Reports

A. AHS Student Report 5 minutes

Presenter: AHS Student Leaders Noah Cott or Hank Stringer

B. <u>AEA Report</u> 5 minutes

Presenter: AEA Representative Alan Parowski

C. OSEA Report 5 minutes

Presenter: OSEA Board Member Steven Essig

7. Board Reports 30 minutes

Presenter: Board Vice Chair Jill Franko

8. Student Board Representative Report 10 Minutes

Presenter: AHS Student Representatives Noah Cott and Willa Vogel

9. Hear Public Comments (The Ashland School District Board of Directors reserves this

time for individuals to relay comments in writing to the Board regarding topics, not on the

printed agenda.)

Presenter: Board Chair Rebecca Dyson

10. District Staff Updates

A. <u>Superintendent Report</u> 15 minutes

Presenter: Superintendent Samuel Bogdanove

1) Classified Employee Appreciation Week 104

B. <u>Capital Bond</u> 15 minutes

Presenter: Executive Director of Operations Steve Mitzel & HMK Program

Director Mike Freeman

1) Monthly Bond Report - January 2024	105
Presenter: HMK Program Director Mike Freeman	
2) ACTION ITEM: HMK recommendation to award GMP	144
Amendment 5 for the Science Bid Package to KNCC + Outlier,	
LLC (KNO) for the Not to Exceed sum of \$7,189,225.09, for a Total	
Not to Exceed Contract sum of \$19,393,149.49.	
Presenter: HMK Program Director Mike Freeman	
C. <u>Ashland High School</u>	
Presenter: AHS Principal Ben Bell	
1) Overview of Behavioral and Mental Health Services 40 Minutes	<u>149</u>
Presenter: AHS Administrative and Counseling Teams	
2) Board Policy IKF Graduation Requirements 10 Minutes	<u>154</u>
Presenter: AHS Principal Ben Bell	
D. <u>Finance Report</u> 15 minutes	
Presenter: Director of Business Services Scott Whitman	
1) Finance Report for the period ending January 31, 2024	159
11. Unfinished Business	
12. New Business	
A. <u>Reduction in Force</u> 10 Minutes	<u>161</u>
Presenter: Superintendent Samuel Bogdanove	
13. Announcements and Appointments	
Presenter: Board Vice Chair Jill Franko	

A. <u>The Board will hold a special session on Thursday, February 8, 2024, beginning</u> <u>at 6:00 pm, to hear from Ashland Education Association members. The meeting</u> <u>will be held on Zoom</u>

B. <u>The Board will hold a work session on Thursday, February 22, 2024, at 7:00 pm</u> on Zoom.

C. <u>The next Regular Session meeting will be held on Thursday, March 14, 2024,</u> <u>beginning at 7:00 pm in the City Council Chamber, 1175 E. Main Street, Ashland.</u> <u>A Zoom link will also be available.</u>

14. Adjourn

Presenter: Board Vice Chair Jill Franko

BOE Regular Session Thursday, January 11, 2024 7:00 PM Pacific Ashland City Council Chamber, 1175 E. Main Street and Hybrid Via Zoom Link Ashland, Oregon 97520

MINUTES

1. Call to Order and Roll Check

Chair Dyson called the meeting to order and a roll check confirmed that all directors were present.

2. Land Acknowledgment

Vice Chair Franko read the Land Acknowledgment.

3. Adoption of Agenda (*At this time Board members are provided the opportunity to amend the Regular Session agenda.*)

Director Skuratowicz moved and Director Hatch seconded approval of the Agenda as presented. The motion carried by unanimous vote of the members present.

4. **Consent Agenda** (All items may be adopted by a single motion unless pulled for special consideration.)

Director Skuratowicz said that she was pleased to see our enrollment holding steady in the January report, reflecting a loss of only three students.

Director Ruby moved and Director Skuratowicz seconded approval of the Consent Agenda as presented. The motion carried by unanimous vote of the members.

4.A. <u>Approval of Minutes of the December 14, 2023, Regular Session and the December 20, 2023, Special Session</u>.

4.B. Personnel Report for January 2024

4.C. Enrollment Report for January 2, 2024

4.D. OSEA Memorandum of Understanding: Emergency Substitute License

4.E. OSEA Memorandum of Understanding: Implementation of Requirements of Senate Bill 756 (2023)

4.F. OSEA Memorandum of Understanding: Confidential Employees

4.G. <u>Resolution to Amend Supplemental Retirement Benefit Provision in the contract of AMS</u> <u>Principal Stephen Retzlaff for the 2024-2025 contract year.</u>

5. School Report - Bellview Elementary

Principal McCollom reported on the Bellview Community Assemblies that happen the last Friday of every month. Each month focuses on a different skill. Students get awards, classes present skits, and the students sing together. Examples of themes are problem solving, gratitude,

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self-regulation, empathy, compassion, and perseverance. "Be safe, Be respectful, Be responsible" is the motto. The students do skits dressed as bees to illustrate this theme. (The active link showing a video example did not operate within the presentation so Principal McCollom will forward the video clips to the Board separately.) Board members were invited to attend any assembly.

6. Early Literacy Grant

Principal McCollom presented an overview of the ASD Early Literacy Grant Application. She showed a series of slides. This year's allocation was \$166,322 and the 2024-25 allocation is set at \$173,110.51. The bulk of funding will be for new K-5 literacy curriculum adoption. We have used some of this funding to support elementary reading specialists to complete the LETRS training. We received funding through SOESD to help compensate teachers for their time spent in learning. Some dollars will be carried over to support the elementary literacy curriculum adoption. The materials are very expensive. There are restrictions on the funding, which needs to be concentrated on grades 1-4. Funds for grades 4-5 require matching funds.

We will partner with SOESD on the training part of the program, focused on the science of reading and demonstrating that our K-5 learners are progressing as they should. All K-5 teachers across all sites, along with administrators and coaches, will receive the training. We will form an adoption committee in 2024-2025 to review available resources and make a recommendation to the Board. Following formal training, the sites will use PLC's and other resources to continue learning on the science of reading.

We hope to offer extended learning programs focused on literacy this summer. We will use student assessment data to select appropriate materials for supporting student needs. We are also deploying high dosage tutoring using intervention and enrichment tools focused on student needs. We will seek out and purchase research-aligned curriculum. ASD has not had a districtwide curriculum before and this will be an important step forward.

We have a communication plan through district and school newsletters, websites, and school board meetings. Teachers from each K-5 school and program will be represented on the curriculum adoption committee. Ideas will be shared via email and staff meetings.

We use iReady for Reading, EasyCBM for Reading, and Six Traits for Writing as assessment tools. Our matching fund requirements will be met through Title I and the General Fund. These will cover reading specialists, professional development, instructional coaching, and summer school extended learning. Ms. McCollom presented an inventory of current resources and tools used by the K-5 sites.

7. La Clinica and Drug & Alcohol Supports at Ashland High School

Elise Travertini presented on Zoom. La Clinica began its partnership with AHS in the Fall of 2022 with somewhat limited services provided a few days a week. They did have a therapist daily during the school week. They did staff vaccinations during a wellness day. They discovered that the high school needed more resources including more than one therapist, additional behavioral health services during the summer, and an improvement in substance abuse interventions. The drug use problem has been growing throughout southern Oregon school districts recently. Finally, students needed medical services five days a week.

In the current year, 2023-2024, they added about .75FTE of a therapist, offered services through the summer, and adjusted some schedules to make a nurse available every day. They added some drug and alcohol screening services, lower level intervention, and prevention. This person also does referrals to more comprehensive drug intervention services.

Director Skuratowicz asked whether La Clinica has metrics that tell us how many referrals it does and the efficacy of their approaches. Ms. Travertini provided some information about collaborations with other organizations for substance abuse interventions. They are just gathering data, and would have a full picture next year, so she volunteered to return with a report in 2024-25.

Ms. Travertini showed elements of a comprehensive student screening that include substance use, anxiety, depression, and suicide screening. They assess social determinants of health to understand whether the student's basic needs are met and work with a community resource specialist to provide direct support to families when needed. After an assessment, they select onsite services or referrals to others. They partner with Phoenix-Talent Counseling for some services. They use Teen Intervene, a widely used and evidence-based curriculum, for in house services. They also now have Narcan available for students. This medication reverses opioid overdoses and is a lifesaving drug.

Ms. Travertini invited questions.

- Director Franko asked about the recent Lund Report stating that University of Oregon has studied substance use among teens and concluded that a majority of schools in Oregon do not use evidence-based resources for prevention. Ms. Travertini said that Oregon ranks last in the nation for behavioral health services available for youth. She added that schools have been emerging from COVID and the aftermath of fires, and are just beginning to catch up with the significant increase in substance use. Schools could do more with partnering to focus on prevention. Groups like La Clinica and Kolpia can help.
- Does our district have science-based prevention programs in line for AHS? Assistant Superintendent Bare said there is a new group of health and SEL educators looking at a comprehensive prevention strategy for grades 6-12. We have relied on health classes to handle this, which we don't offer every year. We also lack continuity across the grade levels. The planning group is looking at how we can sequence a strong, continuing curriculum approach across multiple grades. With new state standards coming out for PE, Health and SEL (Social and Emotional Learning) with a focus on substance use, we are building a comprehensive prevention program. We need to start younger because we know high school is too late.
- Director Skuratowicz, who previously served on the high school Drug and Alcohol Committee, said that Ashland as a community has a role to play. The school can only do so much, but parents and families need to support the work. Substance use is relatively common off campus, sometimes with the support of adults, in events and gatherings.
- Director Franko said that an evidence-based program focused on parents is needed. Ms. Bar said that in its planning, the district is considering how best to involve communities and families in the space. She agreed that part of our community is supportive of drug use, not oppositional to it, and our locus of control is school hours only. We try to

help students learn to make the best decisions with good information and tools, while also trying to share the learning with families.

- Chair Dyson said she would like to know more about the health curriculum at a future meeting. Her observation is that our health education is inconsistent. She asked how our teens are receiving assessments. Are the students referring themselves, or are others in their orbit referring them? Ms. Travertini said that they get referrals from school staff, parents, and students themselves. If anyone has a concern, they can contact La Clinica and it will reach out to students.
- AHS student Hank Stringer asked about the distribution among students with regard to ages and grades? He commented that he is seeing kids younger and younger engaging in substance use. Ms. Travertini said that is part of the data they are accumulating and she will know more at the end of the school year. Currently La Clinica services are only offered through the high school, and they want to look at prevention and education for lower levels. Mr. Stringer encouraged using experts on substance use and other issues. He has found that students pay closer attention when outside expertise is included and it provides support to health teachers.
- Ms. Travertini said that this year La Clinica staff supported teachers during presentations on depression and suicide prevention in 9th & 11th grade classes. Community partners who are actually experts can also offer more information to students.

Director Ruby expressed appreciation for the good work of La Clinica in its role as our partner. The Board expressed appreciation to Ms. Travertini for her report.

8. Recurring Reports

8.A. AHS Student Report

Schools have been closed for winter break so the students had a brief report. AHS student Hank Stringer reported that winter sports are going well. Several students placed on the podium at the recent wrestling tournament and they had a snowboard waxing event as a fund raiser. The Ashland Co-op is doing its monthly cash register round-up to the AHS Culinary Program. The student parking lot has been expanded to include all students and the talent show is coming soon. We are using an overflow lot managed by SOU during bond construction.

8.B. AEA Report

AEA representative Alan Parowski expressed appreciation to the Board members for School Board Appreciation Month. He commended the many hours that they devote to the schools and its students. He read reports from the school sites.

8.C. OSEA Report

Steven Essig presented the report from OSEA Chapter 42. He appreciated the classified staff including bus teams, crossing guards, and custodians for keeping students safe during the recent inclement weather. He recognized Bellview crossing guard Mia Pederson with a photo of her standing in blizzard conditions while controlling traffic. Classified staff continue to report difficulty in finding classified subs.

OSEA recognizes January as National Poverty in America Awareness Month and the impact of poverty on our students and communities. OSEA regrets that the USDA ended the free lunch expansion program that provided funding for free meals to all students in recent years. Mr. Essig highlighted the Food Service Donation Fund established to help families across the district pay for lunches. Any site can accept a donation at the front office with a credit card, cash, or check.

Director Skuratowicz asked whether there was any move in Oregon to provide free school lunches for all students. Assistant Superintendent Erika Bare said that there have been conversations but nothing is on the immediate horizon at this time. Director Franko commented that she appreciated hearing about the Food Service Donation Fund and she encouraged donations to it. The fund supports students who may carry outstanding deficits on their lunch accounts.

9. Board Reports

Director Franko reported that she and Director Ruby worked on the affordable housing project and met with officials from the City and SOU. She and Director Skuratowicz met with members from Project Youth Plus to learn about the ways they support our AHS and AMS staff. Director Skuratowicz reported that the Board has been engaging deeply in our superintendent search, and will be interviewing semi-finalists in a couple weeks. The innovation group on Re-Imagining High School has looked at different alternatives, and is assessing options, reviewing readings, and continuing to do research. They are reaching the point where they will narrow the options and form recommendations to the Board.

Director Ruby has been engaged with the innovation group focusing on increasing enrollment. They have talked with Rep. Pam Marsh about ideas. He attended the Big Idea talk that Assistant Superintendent Bare and Director Skuratowicz had with AAUW members, the AHS snowboard waxing party, and has been doing some community listening. He encourages people to talk with administrators and invites people to send email to the school board. They do read and respond to them. He appreciated Mr. Essig's comment that classified staff do their job no matter the weather or other circumstances.

Chair Dyson thanked the Superintendent for a snow day, as she was able to take family members to a Mt. Ashland ski trip. She reported on the superintendent search. The Board received a healthy pool of applicants and the quality of the candidates was excellent. The Board finished a first screening and on January 20 it will do virtual interviews with selected people. The community panel will then interview a smaller pool, with finalists coming in early February for in-person interviews. The process is moving along at a good pace.

In light of School Board Appreciation Week, Chair Dyson personally thanked her fellow directors for their great work and collaboration, and for making space for her personal challenges as one of her children is receiving medical care. She feels well supported by her colleagues.

9.A. Update on Innovation Committee - Calendars and Schedules

Director Hatch gave an overview of the work of the School Calendar and Schedules Committee. He joined the group after its formation by Assistant Superintendent Bare and former Board member Sabrina Prud'homme. The committee aims to address many factors:

- Improve student academic achievements,
- Address mental health challenges and student quality of life,
- Achieve cost savings,
- Realize improvements for families, staff, students, and the community at large.

Currently, members are only doing research and will make no decisions. Its findings will go to the full Board for further action. Subcommittees are researching options and the group is doing quality work. The options will probably focus on:

- 1. Maintain our status quo with some modifications to fine tune the schedules,
- 2. Recommend a move to a balanced calendar (aka year-round school). This is a calendar that distributes school breaks equally across the calendar year,
- 3. Move to a 4-day school week. Results on these are mixed according to research. The assumptions schools have about them do not always pan out in research.

The committee has offered a survey of staff, students, care givers, and the community seeking feedback on options. They have received a robust response with no overwhelming choice preference. The option of retaining the *status quo* is the slight preference, though the difference is not profound. All options `have potential adherents according to survey results.

This group recently met jointly with the Re-Imagining High School members to look at merging findings and avoiding conflicts. His group is now developing a rubric to measure the effects described in research for each option. There will be ample time for the schools and community to digest, question, and examine options. He does not expect the committee to put forward a single recommendation, but to describe the options with expected possible impacts. The committee is dedicated to maintaining academic excellence above all.

10. Student Representative Report

AHS Student Rep Willa Vogel reported over Zoom from home. She said that students met again about a potential School Resource Officer (SRO) and next steps to create the program. They want to inform students broadly through TCB (Taking Care of Business) sessions and student clubs or affinity groups. The intended purpose of an SRO program is to keep campus safe, not just to enforce discipline. Many students don't fully understand the SRO role. AHS Student Rep Noah Cott reported that Dean Weston helped do a meeting with the Asian Student Union. She heard that many are comfortable with the idea within their group, but worried about other student constituencies. As a first step, student representatives will visit the affinity groups and student unions to get broader input. They want to meet twice with each group. The first meeting would be to introduce and inform about the idea. Then a second meeting would be held after the groups have time to caucus about the idea and police officers will visit to talk through the ideas. APD officer Bon Stuart helped Noah get an idea of the opportunity this would represent and he was excited. Officer Angel came to the Leadership Class and talked with students about being an SRO.

11. **Hear Public Comments** (*The Ashland School District Board of Directors reserves this time for individuals to relay comments in writing to the Board regarding topics, not on the printed agenda.*)

Isaiah Creel, a resident of Ashland, spoke to the importance of school counselors for student mental health and suicide prevention.

12. District Staff Updates

12.A. Superintendent Report

12.A.1) School Board Appreciation Month

Assistant Superintendent Erika Bare substituted for Superintendent Bogdanove, who was under the weather and participating on Zoom. She read Mr. Bogdanove's descriptions of our school board members, who are:

- Champions of education, equity, and access.
- The unsung heroes behind the scenes tirelessly advocating for quality education and ensuring that our schools provide the best learning environment for every single student.
- Continually examining ways that we can innovate and continually looking for new ways to best support our students.
- Community connectors. The Board is like the glue that holds our community together.
- Budget wizards, holding us on track fiscally, and holding us to high financial standards, always asking the question, "Is this good for kids?"
- Curriculum guides. School board members play a vital role in shaping our curriculum, helping decide what our students learn and ensuring alignment with the best and latest educational standards that will prepare students for the brightest of futures.
- Policy Pioneers. From attendance policies to graduation requirements, school board members are the architects of policies that govern our schools. Their flexible and critical thinking on policy has helped our district remain nimble in the face of new challenges.
- Advocates for equity, passionate about creating a level playing field for all students. They champion equity and diversity, working to eliminate barriers and provide every child with an equal opportunity to succeed.
- Cheerleaders for success of our students, celebrating the accomplishments and victories of our students and schools.

She then read the Proclamation from the Office of the Superintendent declaring the month of January to be School Board Appreciation Month. Ms. Bare took a group photo of the Board members with their appreciation certificates.

Ms. Bare then reported that January is off to a snowy start. The District works closely with National Weather Service forecasts, reviewing road conditions and bus routes to determine safety. Once buses were deployed on Wednesday, we decided to keep school open, even though snow resumed quickly after most students were at school. We then closed on Thursday because our employees need to clear snow from parking lots, stairs, and walkways for safety reasons. We know it is challenging when schools stay open and when they close, but safety is our top concern.

On January 20, there is a joint staff training event for school districts from Eagle Point, Ashland, and PACE, on the Standard Response Protocols for School Safety. Several local law enforcement agencies will also participate. The featured speaker will be John Michael Keyes, the founder of the I Love You Guys Foundation and creator of the response protocols. He is a leading expert in the field.

Monday, January 15, schools will be closed in honor of Dr. Martin Luther King and teaching kids about his career and legacy. Many activities are scheduled in the schools and classes during the week.

Some AHS classes have moved temporarily into Lincoln during bond construction. We are grateful to the project teams and the community. Thanks to Rebecca Bjornson and Steve Mitzel for their coordination of a big project. We also opened a new SPED classroom in Lincoln over winter break for students with acute needs and the operations staff turned it around in a very short period of time. Our Counseling Department is reviewing how they can best support our sites and students with the current staff team.

12.B. Capital Bond

12.B.1) Monthly Bond Report - December 2023

Executive Director of Operations Steve Mitzel stated that the District is about 1.5 years away from completion of the bond work. He showed a photograph of the seismic retrofit work in the basement of the Humanities Building. HMK Program Director Mike Freeman reported work is mainly at the high school at this point. During winter break they started demolition in the Science and Humanities buildings, doing abatement of hazardous materials while the buildings were empty. Crews worked extended hours. They are now moving to the second story of HU on seismic work. Exterior steel and rebar are used to reinforce the walls. The team is currently bidding out the remainder of the Science building work, along with mechanical, electrical, and plumbing finishes. We received a good response from subcontractors and should have an action item for a GMP shortly. The Bellview HVAC chiller should arrive in March and complete that work. The TRAILS solar transformer is on the way and should be installed in February.

Director Ruby asked about the rebar grid installed on the outside of the Humanities brick and whether it will provide the base for a reinforced sheer structure. Mr. Freeman said it will be covered with concrete and provide a shell for the building walls. This structure will envelop all three floors of the building. They also poured new footings all the way around the building last summer.

Mr. Mitzel offered to host a construction tour for the Board so they can see what is happening. The Science work will be a modernization and you cannot really tell from the street what is happening.

In response to a question, Mr. Mitzel said that we expect to achieve substantial completion by December 31, 2024. It may take another 6 months for punch list items and final touches to be totally complete. We will continue using Lincoln for overflow, hoping to get many students back at the beginning of the 2024-2025 school year, then others will go over to

Lincoln for the remainder of the time. Hank Stringer reported that the transition has been very smooth and the students just need to walk across the street during passing periods.

Mr. Mitzel reported that the new stairs on the Science building are working well, with the new roofs over the stairs keeping them pretty clear of snow. This is much safer for students and staff.

12.C. Finance Report

12.C.1) Finance Report for the period ending December 31, 2023

Director of Business Services Scott Whitman reported on the District General Fund, saying that there were no major changes from projections. We did get expected State School Fund (SSF) and property tax revenues. There were no major expenditure discrepancies against projections. The District hopes to control expenses and maintain a projected \$1 million Ending Fund Balance. The SSF allocation is set by ODE but the formula changes through the year as adjustments are made for enrollment changes. The Census Bureau recently published a new small area census on poverty numbers and the Ashland numbers improved (lower poverty levels); unfortunately, this reduces the poverty factor that is part of our funding formula and thus reduces projected revenue. So far this year, we expect about \$100,000 less than budgeted. The swings of \$100,000 or more do have impacts on our budget. We also updated our Average Daily Numbers enrollment formula, so in March we will get another revised estimate on our annual funding allocation.

12.C.2) Quarterly Reviews of Special Revenue Funds

Mr. Whitman then reported on special revenue funds for the period.

ESSER – This funding has ended. It was federal funding to provide extra support during the COVID pandemic. We overspent our allotment and will need to "pay back" from our general fund. The reason is that we added staffing during COVID to handle pandemic requirements and have not proportionately reduced, so we are essentially "overstaffed."

Food Service Fund. We always fund food service at some deficit because we do not receive enough payment or reimbursement to cover the cost of providing the meals to the federal standards required by the free and reduced lunch program. This deficit is currently \$560,000 for the past two years. Our general fund owes replenishment to this fund also. Our deficit here has grown. During the pandemic we had support to serve lunches to all students but that support has declined. With so few students eating meals, it is impossible for us to achieve an economy of scale with regard to purchases of supplies. The primary expense is staffing levels, though we run with a very small number of staff. Our reimbursement has dropped and we do not charge "market rates" for meals. The high school open campus results in so many students leaving for lunch that we cannot capture economies of scale. It would help if more families completed the application form, as other services are provided in addition to meals. Oregon now allows some automatic enrollments through other state support services for families in need and that helped us somewhat.

Our student reps said many students do leave campus, and some bring their own lunches. He said students do not always love what the food service cooks. Seniors with drivers licenses are more likely to leave for lunch. Noah Cott commented that the high school does a good job of messaging on the forms. Director Hatch said that families may not know the role that the forms play as serving the needs of the district. We should encourage all families to fill them out.

Our SIA (Student Success Act) grant is holding stable and pays for 15 certified FTE and a handful of classified, along with some operating expenses. HSS (High School Success) money covers about 5 FTE at the high school and partial FTE at AMS focused on career and technical education programs. At AHS these teachers are in the CTE College and Career Readiness programs – woods, culinary arts, metals and auto shop, and digital graphics. Title I funds bring additional supports in elementary schools based on poverty rates and the IDE money supported special education.

12.C.3) ASD Planning Budget Report

Mr. Whitman gave an update on the planning for next year's budget. The Cabinet and Lead Team members have worked to identify potential reductions of about \$2,240,000 for the 2024-2025 school year. New estimates are based on returning to staffing levels for historic class sizes in 2019-2020. We have challenges because our students today have more need for support but we must budget based on reduced revenue. Although the district projected a natural staff attrition through the year based on historical trends, it did not materialize. The District has instituted a hiring free on most positions. Even with all of the proposed cuts, we only end up at break even and do nothing to partially rebuild the required operating reserve. More is needed and we are looking for additional reductions approaching \$1 million.

Some ideas recently gathered, most of which would require bargaining with respective staff representation, include:

•	Reduction of extra duty contracts of 25%	\$300,000
•	Lower COLA – reduce by 1% from 3% to 2%	\$200,000
•	Eliminate one teacher contract day	\$150,000
•	Consider a choice school re-design	\$1,250,000

The administrative team will continue working on recommendations for further discussion with the Board.

13. Unfinished Business

None

14. New Business

None

15. Announcements and Appointments

Chair Dyson read the announcements of upcoming meetings.

16. Adjourn

There being no further business, Chair Dyson adjourned the meeting at 10:00 pm.

Submitted by: Jackie Schad, Board Secretary

Superintendent Samuel Bogdanove Board Chair Rebecca Dyson

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Ashland School Board Thursday, January 25, 2024 Executive & Work Sessions Virtual Via Zoom Link Ashland, Oregon 97520

MINUTES

1. Call to Order / Roll Check

Chair Dyson called the meeting to order at 6:00 pm. A roll check confirmed that all directors were present and Chair Dyson read the order of the meeting, beginning with the first executive session.

2. The Board will convene in Executive Session per ORS 192.660(2)(e) to conduct deliberations with persons designated by the governing body to negotiate real property transactions

There was a discussion of the impact of Urban Growth Boundaries on potential uses of properties owned by the district and an explanation of land use planning procedures. No actions were taken.

3. The Board will then continue in Executive Session per ORS 192.660(2)(d) to conduct deliberations with persons designated by the governing body to carry on labor negotiations. The Board received a briefing on upcoming matters that will be subjects of bargaining with AEA and OSEA. No actions were taken.

4. The Board will emerge from Executive Session to consider other items on its agenda.

5. ACTION ITEM: Early Literacy Grant

Following the presentation of the District's Early Literacy Grant application at the January 11 regular session, and an interval to allow public comment, the Board was asked to formally approve the application. Director Skuratowicz moved and Director Hatch seconded a motion to approve the Early Literacy Grant application as submitted. The motion carried by unanimous vote of the members.

6. Budget Update

Director of Business Services Scott Whitman presented an overview of the financial condition of the district and planning in process for the 2024-2025 budget. Mr. Whitman said the district will end the current fiscal year with a significantly depleted ending fund balance well short of the 8% goal in board policy. Current projections indicate the potential of a budget deficit in 2024-2025 approaching \$1 million. This projection assumes reduced enrollment by 40 students, maintaining current staffing levels, providing eligible salary steps, and a 3% COLA across all employee groups. It continues a similar level of non-payroll spending, currently about 15% of the budget. In order to achieve a balanced budget, cuts will be necessary.

He reviewed the decline in enrollment from 2019-2020 to this year, largely a result of the state ending open enrollment. Ashland typically gained about 300 students annually from that policy, for a total of \$3.2 million in State School Funding. Combined with this, we added staffing during pandemic years, a necessity to accommodate all of the elements of COVID schooling. Federal

ESSER dollars covered much of this cost. However, we have reached the point where we need to reduce staffing levels to where they were in 2019.

Mr. Whitman presented some options for reducing costs. These included increasing class sizes, reducing administrative costs, looking at other program cuts, and reducing the number of educational assistants. These have been identified by district and site administrators. Even if all were implemented, there remains a need to find an additional equivalent of almost \$1 million in reductions. Options here are both short-term and long-term, and include:

- Reducing the amount of extra-duty or extra pay arrangements by 25%
- Reducing the expected 3% COLA to 2%
- Eliminating one contract day by eliminating a conference day
- School redesign options by level. This would be a longer-range option and would need to include the new superintendent.

The Board members asked several questions:

- ➢ Is a 2% COLA realistic?
- Could the Board receive a list of the types of extra-duty stipends, including jobs and dollar amounts. What does "extra pay" include besides longevity?
- Is the goal of spending 80% of our budget on personnel (currently 85%) a true standard? Mr. Whitman that it is for most districts in our region.
- Are there options for additional revenue generation? Director Ruby noted that the Innovation Committee on enrollment is talking about this because more students result in more revenue.
- > How will the district look at impacts of any changes on the schools?
- The District has a contingency reserve for emergencies but should be budgeting for regular repair and maintenance of its facilities and vehicle fleet.
- > What options are under consideration for school redesign approaches?
- > How is the District considering the equity impacts of a Reduction in Force?
- The Board has learned about challenges with accuracy of financial data and other HR details. Do we currently have all staff correctly recorded?
- > Why do we have multiple contingency funds?
 - Mr. Whitman noted that we have contingency funds for different fund classes, e.g., the General Fund, Special Revenue Funds, and Construction.
- > Are our current software systems adequate?

Superintendent Bogdanove said that during February, the Lead Team will look more closely at the options. There will be a need for broad community engagement and input as we proceed. Information will be going out to staff in the next week or so. When we added classified positions using ESSER funding, we knew they were temporary. We must align our expenditures to match available revenue.

Board members asked for assurance that our financial statements and personnel designations will be rock solid if we need to initiate a RIF process. Supt. Bogdanove said that he has a high level of confidence. As errors have been brought to the administration's attention, the software has been improved, we initiated more staff training, and identified some audit controls that were not correctly fine tuned in the Visions software. These have been addressed.

7. Mid-Point Update on Board Innovation Committees

Director Franko suggested that since we are at a mid-point, we should revisit where the Innovation Committees are? Do we have clear dates and deliverables? Do we need a schedule of updates? Superintendent Bogdanove said that we do have a web page devoted to the Innovation groups and projects, but it needs updating. Secretary Schad noted that she will make this a priority.

Director Skuratowicz gave a summary of the Re-Imagining High School group.

- > This group identified some big issues and began by working to clarify the "why"
- > They generated a list of possibilities and began to gather data
- Members have worked with a consultant on examining other districts that accomplished big re-design projects.
- > Any major changes require significant teacher and community buy-in.
- > They have begun doing surveys of staff and families.
- An example of one idea is changing the system of student grading at the high school. We are losing both students and student engagement. The current crop of students seems to have less developed Social and Emotional Learning skills.
- > They are looking at options like "extreme project-based learning."

Director Hatch reported that his group is traveling a similar path looking at Calendar and Schedules. They are researching and exploring a variety of options. He is deeply impressed with the time and commitment that the volunteers are bringing to the project and they expect to have concrete recommendations to bring to the Board in the spring. They also agree with the need for an expansion of feedback and engagement before any final decisions can be made.

Director Franko reported that the Enrollment group exploring affordable housing did receive a grant of \$175,000 and is seeking several others. The newly created nonprofit Sunstone will use the first grant to cover start-up costs. The goal is to raise sufficient funds to cover a gap in the property acquisition cost that would make a project viable for a nonprofit builder. There are some conversations with Housing Authority of Jackson County. Director Ruby said that this group's projects have a longer scope and timeline.

He is interested in expanding programmatic ways to retain and recruit students. Questions can include how we can serve families that have left, and what are the best choices we can offer families? Can we build on Ashland Connect and Grizzly Academy? He thinks we can find synergy with models growing in others areas of Oregon. There is also overlap with the Re-Imagine High School approach.

The enrollment team spun off marketing, the members of which are pursuing an idea surfaced by Matt Hoffman to market Ashland as "Storytown." Matt's production company is working on this. This group also thinks early childhood programs are important and is supporting the work of the City of Ashland on this topic.

8. Board Calendar Items

8.A. Board Retreat

The group selected the date of Saturday, March 16 for a retreat from 9:00am-3:00pm. Work on an agenda will follow.

8.B. Board meeting with AEA Leadership

The Board responded to a request from AEA Leadership for a meeting with the Board by scheduling it in advance of the February 22 work session at 6:00 pm on Zoom.

9. Adjourn

There being no further business, Chair Dyson adjourned the meeting at 9:05 pm.

Submitted by: Jackie Schad, Board Secretary

Dated for Board Approval: February 8, 2024

Board Chair Rebecca Dyson

Superintendent Samuel Bogdanove

Ashland School District Board Personnel Report February 1, 2024

SITE	NAME	POSITION	STATUS	STATUS	SALARY PLACEMENT
				CHANGE	EXCEPTION
AHS	Eric Wolff	teacher, math	resignation	NO	NONE
AHS	James Lebo	Science Lab Aid	Temporary services	NO	NONE
AHS	Rachel Murphy	EA -Site based	.75 FTE Temporary	NO	NONE
AHS	Jacqulyn Case	AP Dual Credit	Temporary services	NO	NONE
AHS	Paul Huard	Peer-to-Peer Mentor - Woodruff	Temporary services	NO	NONE
AHS	Cayley Busenkell	Robotics Advisor .5	Temporary services	NO	NONE
AHS	Tamara Anderson	Robotics Advisor .5	Temporary services	NO	NONE
AHS	Brian Kerns	Musical Advisor	Temporary services	NO	NONE
AHS	Quinn Haldane	Speech and debate Coach	Temporary services	NO	NONE
AHS	Scott Chadick	Weight Room	Temporary services	NO	NONE
AHS	Tito Soriano	Academic Advisor	Temporary services	NO	NONE
AHS	Matt Preston	Boys Golf Coach	Temporary services	NO	NONE
AHS	Jorge Ramirez	Asst Track Coach	Temporary services	NO	NONE
AHS	Ronald Rylance	Asst Track Coach	Temporary services	NO	NONE
AHS	TreVon Dorsey	Asst Softball Coach	Temporary services	NO	NONE
AHS	Paul Kitzman	Asst Athletic Director	Temporary services	NO	NONE
AHS	Rosie Converse	Head Track Coach	Temporary services	NO	NONE
AHS	Jennifer Young	Head Softball Coach	Temporary services	NO	NONE
AHS	Ryan Oakley	Asst Baseball Coach	Temporary services	NO	NONE
AMS	Jessica Pinkerson	ea	increased to 0.875 fte	NO	NONE
AMS	Marianne Wallace	ea	decreased to 0.75 fte	NO	NONE
AMS	Blair Harrison	еа	0.75 fte	NO	NONE
AMS	Andrea Royse	Drama coach, Spring Play	Temporary services	NO	NONE

Ashland School District Board Personnel Report February 1, 2024

AMS	Clover Weisinger	Music Coach Orchestra	Temporary services	NO	NONE
AMS	James Johnson	Musical props	Temporary services	NO	NONE
Student Services	Diane Berry	peer to peer mentor - Slinkard	temporary services	NO	NONE
Student Services	Allison Bingaman	peer to peer mentor	temporary services	NO	NONE
Student Services	Diane Berry	peer to peer mentor - Roberson	temporary services	NO	NONE
Student Services	Tara Elder-Hammond	LETRs Specialist	temporary services	NO	NONE
Student Services	Audrey Bowley	Teacher, Site Based	1.0 FTE Temporary	NO	NONE
Willow Wind	Richard Heller	Theater Coach	temporary services	NO	NONE
Walker	Michelle Ignacio	affinity group facilitator	temporary services	NO	NONE
Walker	Blair Harrison	ea	resignation	NO	NONE
Walker	Jessica Bakke	Teacher, Kindergarten	1.0 FTE Temporary	NO	NONE
Food Service	Carmen Lenormand	food service worker	resignation	NO	NONE
Food Service	Julie Ann Tobrock	food service worker	reduced to 0.875 fte	NO	NONE
Maintenance	Siobhan Carr	custodian	resignation	NO	NONE
Maintenance	Logan Boyd	custodian	1.0 FTE	NO	NONE

ASHLAND PUBLIC SCHOOLS ENROLLMENT SUMMARY

February 2024 Full Time Enrollment

SITE	K	1	2	3	4	5	6	7	8	9	10	11	12		
BELLVIEW	39	33	41	43	45	53								254	BELLVIEW
HELMAN	39	42	42	58	47	71								299	HELMAN
WALKER	29	36	38	46	43	52								244	WALKER
TRAILS	12	16	17	16	17	16	17	23	8					142	TRAILS
*Ashland CONNECT	1	0	1	1	2	2	2	7	8					24	CONNECT
AMS							163	180	198					541	AMS
AHS										221	230	199	208	858	AHS
WILLOW	18	20	20	21	18	23	24	20	15					179	WILLOW
ASD TOTALS	138	147	159	185	172	217	206	230	229	221	230	199	208	2541	TOTAL

						Februa	ry Enro	llment Hi	story						
	2010	2011	2012	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	
BELLVIEW				304	315	322	325	315	318	263	256	246	258	254	BELLVIEW
HELMAN				303	303	314	351	345	345	286	286	281	315	299	HELMAN
WALKER				283	299	342	343	337	344	275	277	226	221	244	WALKER
JOHN MUIR				101	100	120	122	123	122	105	107	180	135	142	TRAILS
AMS				577	579	562	565	564	517	485	480	461	527	541	AMS
AHS				960	971	996	971	950	940	942	914	934	888	858	AHS
WILLOW				208	195	192	179	178	180	159	150	150	163	179	WILLOW
Ashland Connect												0	24	24	CONNECT
ASD TOTALS				2736	2762	2848	2856	2812	2766	2515	2470	2478	2531	2541	ASD TOTALS

Γ	Monthly Enrollment									
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Мау	June
2023-2024	2571	2553	2539	2532	2529	2541				
2022-2023	2560	2563	2546	2552	2543	2543	2530	2538	2535	2531
2021-2022	2478	2487	2441	2449	2465	2483	2471	2476	2472	2443
2020-2021			2530	2515	2509	2505	2490	2491	2486	2470
2019-2020		2835	2825	2820	2804	2797	2781	2774	2763	2766
2018-2019		2897	2894	2881	2860	2846	2830	2842	2824	2812
2017-2018	2935	2922	2913	2912	2905	2897	2892	2878	2869	2856
2016-2017	2898	2897	2901	2929	2879	2864	2847	2845	2826	2848
2015-2016	2856	2852	2845	2875	2815	282124	2796	2793	2779	2812
2014-2015	2752	2750	2762	2804	2752	2742	2731	2729	2727	2762

ASHLAND PUBLIC SCHOOLS ENROLLMENT SUMMARY



DATE: January 23, 2024

- TO: Board Members of SOESD Component School Districts
- FROM: Scott Beveridge, Superintendent Southern Oregon Education Service District

RE: SOESD 2024-25 Local Service Plan and Student Success Act Comprehensive Support Plan

According to ORS 334.175(5)(b), an ESD Local Service Plan must be approved on or before March 1 by resolution of two-thirds of the component school districts that are a part of the education service district and that have at least a majority of the pupils included in the average daily membership of the education service district, as determined by the reports of such school districts for the preceding year, enrolled in the schools of the school districts. According to HB 3427 (2019), an ESD Comprehensive Support Plan must be adopted and amended as provided for local service plans under ORS 334.175

SOESD presents the 2024-25 Local Service Plan (LSP) as a product of our collaboration with school districts to deliver services that are responsible to districts' needs, by providing flexibility in service choices, maintaining service quality and stability, and leveraging regional advantages in cost effectiveness and increased opportunities for students. The 2024-25 LSP includes the SOESD Student Success Act Comprehensive Support Plan developed from the top priorities identified by component school districts for assisting with development and implementation of their Student Investment Account plans for implementing the Student Success Act.

Your district's participation and input in the strategic planning process is reflected in the 2024-25 LSP and services we have already implemented this school year.

SOESD takes very seriously our responsibility to provide a range of services that are responsive to your needs, high in quality, and affordably priced. We appreciate your consideration of Southern Oregon ESD's Local Service Plan and look forward to serving you in 2024-2025.

Thank you.

jb	
Enclosures	

Scott Beveridge, Superintendent | www.soesd.k12.or.us | 541-776-8590 | Main Office: 101 N Grape St, Medford, OR 97501

550 SW 6th St. Suite E Grants Pass, OR 97526



LOCAL SERVICE PLAN 2024-25

Scott Beveridge, Superintendent Southern Oregon ESD 101 North Grape Street Medford OR 97501



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EXECUTIVE SUMMARY

Southern Oregon Education Service District (SOESD) is proud to present the 2024-2025 Local Service Plan (LSP). The LSP is a product of our collaboration with school districts to deliver services that are responsive to districts' individual and collective needs by providing flexibility in service choices, while maintaining service quality and stability, and leveraging regional advantages in cost effectiveness and increased opportunities for children, students, and families in the communities we serve. The 2024-25 LSP includes the SOESD Student Success Act (SSA) Comprehensive Support Plan (CSP) developed from the top priorities identified by component districts for assisting with development and implementation of their Student Investment Account (SIA) plans for implementing the Student Success Act.



EXECUTIVE SUMMARY CONT.

Strategic Initiatives

The LSP reflects the strategic initiatives of SOESD's recently launched strategic plan that is responsive to input from component districts and staff, students, and families.

EQUITY

Fully integrated equity lens in all that we do, fueled by guiding questions.

DISTRICT AND COMMUNITY PARTNERSHIPS

- Develop and implement clear feedback loop processes with districts.
- Increase integration and tracking of early childhood pre-k community efforts to enhance school preparation.

COLLABORATION & INFORMATION SHARING

- Streamline key systems and processes to be more user friendly and transparent.
- Increase cross-department communication and program synergy to leverage capabilities and resources, identify shared needs and aims, and enhance service delivery.

PROGRAMS AND SERVICES

- Assess, redesign, implement, monitor, and adjust Special Education services to best meet district needs.
- Implement, monitor, and adjust expanded support for Student Behavioral Health and Wellness.
- Implement, monitor, and adjust expanded support for cybersecurity, physical security, and coordination of crisis management services.
- Implement, monitor, and adjust an expanded system of support for Career Technical Education.
- Implement. monitor, and adjust expanded services for students and families who have been marginalized to increase access, cultural awareness, curriculum, and training to reduce bias, discrimination, and racism.

EDUCATOR WORKFORCE DEVELOPMENT

- Develop, implement, monitor, and adjust innovative recruiting and hiring strategies to decrease vacancies and the gap between education and student diversity.
- Develop, implement, monitor, and adjust expanded preparation models for new and emergencycredentialed teachers.

DATA TRACKING

Develop and implement a clear data platform that provides service measures, tracking information, outcomes, and reporting capabilities.

The strategic initiatives define programmatic restructuring and new service offerings in agile response to needs, along with streamlined process adjustments that increase feedback mechanisms for enhanced responsiveness to constituents.

EXECUTIVE SUMMARY CONT.

SOESD has already made significant changes while quickly implementing the initiative priorities:

- Engaged in a thoughtful organizational redesign of Special Education Services to the new Student Services department
- Expanded the Student Behavioral Health and Wellness program
- Expanded services to help districts with crisis management, including cybersecurity and a new Flight Response Team
- Expanded Career and Technical Education (CTE)
- Provided newly designed **New Teacher Training model** and an **expanded Mentoring with a tiered support model** offering a continuum of services for as little and as much support as desired
- Added new Teachers and Educational Assistants to **expand the STEPS Plus Program, increasing access and services for students**
- Expanded Data systems support by preparing the launch of:
 - o Student Connect information platform regarding students served and services provided
 - o Online LSP Portal with regularly updated financial allocation, service selection, and balance reports
 - o **Seventh Edition of the Oregon Project** for Preschool Children who are Blind or Visually Impaired (The OR Project)

SOESD Funding and the Regional Advantage

SOESD utilizes State School Funds to provide services required by the LSP process for school districts in Jackson, Josephine, and Klamath counties that serve approximately 48,000 students representing 9 percent of the students in Oregon. The SOESD geographic region is the largest ESD region in Oregon comprising almost 10,600 square miles, which is larger than seven of the states in the US. SOESD brings added value to our districts surpassing the requirements of the Local Service Plan by historically obtaining over half (51% in 2023-2024) of our annual revenue (\$104,143,899 in 2023-2024) through grants, contracts, and entrepreneurial services, expanding our partners and the area we serve, while providing enhanced or additional highly valued services to benefit our local districts.

SOESD is proud to serve as a progressive leader in the ESD community, within our region, and in the state. This 2024-25 LSP represents the continued leadership of our organization to provide a leading number of highly valued and innovative services aligned with Oregon's initiatives, delivered through a modern business model, in partnership with the districts we serve, and in synergy with our network of ESDs across Oregon.

On behalf of the SOESD board and administrative leadership, I would like to recognize that our success is due to the work of our staff in cooperation with our component districts. It is through staff's service, responsiveness, and expertise – with a focus on customer service and satisfaction – that we have established and continuously build our value on doing what is best for children, families, and our communities.

Respectfully,

Scott Beveridge
Superintendent

PREFACE

This Local Service Plan and accompanying Student Success Act Comprehensive Support Plan have been developed in accordance with legal requirements as a description of services to be provided to component school districts by Southern Oregon ESD during the 2024-25 school year. However, it is important to note that these services can only be provided if adequate funds are available. In the event of a funding change, services will be prioritized in close consultation with the superintendents of the districts served by Southern Oregon ESD.



LOCAL SERVICE PLAN REQUIREMENTS

ORS 334 – Local Service Plan Requirements

ORS 334.005 specifies that the mission of education service districts is to assist school districts and the Department of Education in achieving Oregon's educational goals by providing equitable, high quality, cost-effective and locally responsive educational services at a regional level. The SOESD local service plan must include the following services as defined in ORS 334.175:

- Administrative and support services for component school districts, including but not limited to services designed to consolidate component school district business functions, liaison services between the Department of Education and component school districts and registration of children being taught by private teachers, parents, or legal guardians.
- **Programs for children with special needs**, including but not limited to special education services and services for at-risk students.
- School improvement services for component school districts, including, but not limited to services designed to support component school districts in meeting the requirements of state and federal law; services designed to allow the education service district to participate in and facilitate a review of the state and federal standards related to the provision of a quality education by component school districts; services designed to augment and facilitate continuous school improvement planning; services designed to address school-wide behavior and climate issues; and services designed to support career and technical education.
- **Technology support** for component school districts and the individual technology plans of those districts, including but not limited to technology infrastructure services, data services, instructional technology services and distance learning.

The goals of these services are to:

- Assist component school districts in meeting the requirements of state and federal law;
- Improve student learning;
- Enhance the quality of instruction provided to students;
- Enable component school districts and the students who attend schools in those districts to have equitable access to resources; and
- Maximize operational and fiscal efficiencies for component school districts.

Local Service Plan Approval Process

The Local Service Plan must be approved by the school boards representing two-thirds of the component districts with greater than 50 percent of the students voting in favor of the plan.

Local Service Plan Amendment Process

The Local Service Plan may be amended at any time by the SOESD board if component districts approve an amendment pursuant to the same criteria used to approve the original plan.

LOCAL SERVICE PLAN TIMELINE

Timeline for Local Service Plan Development and Approval Process

Starting in September 2023

Review current Local Service Plan model and any suggested modifications based on input from component school district directors, business officials, and superintendents.

By December 2023

Local Service Plan submitted to component school district superintendents.

By January 2024

- Local Service Plan submitted to SOESD Board for approval.
- Local Service Plan submitted to component school district boards for approval.

January - February 2024

Component school district boards take formal action on Local Service Plan and submit resolution ballots to SOESD.

By March 1, 2024

Approval cycle completed.

Timeline for Local Service Plan Service Selections

March 1, 2024

Projected service costs are published.

March – April 2024

Discussion with component school districts regarding service needs.

By April 2024

Local Service Plan selections are confirmed by component school districts for all service areas. Special education choices will be for the 24-25 school year. Technology and School Improvement choices will be a commitment for the third year (through the 25-26 school year).

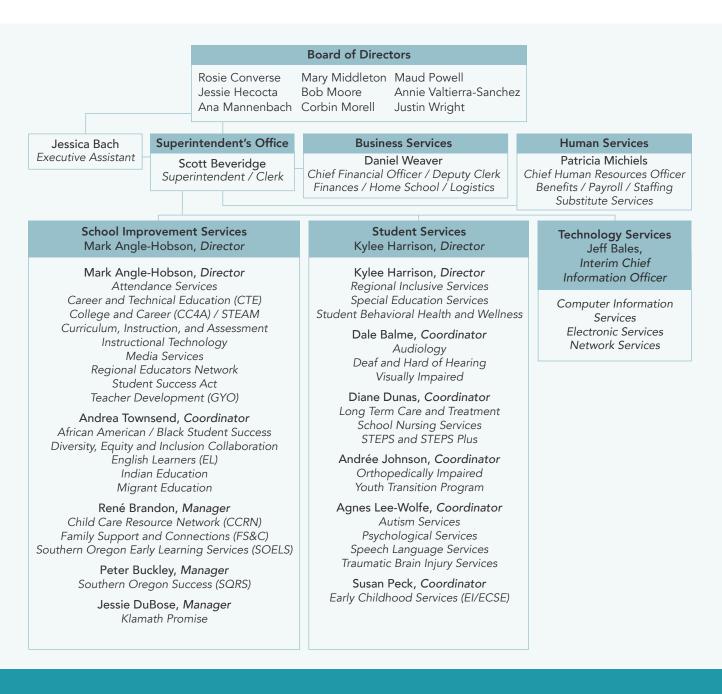
ORGANIZATIONAL STRUCTURE

Local Service Plan Core Services

Southern Oregon ESD is organized into four core service areas to reflect the priorities set forth in the Local Service Plan:

- Administrative and Business Services
- Special Education Services

- School Improvement Services
- Technology Services



Mission

As a responsible partner, we provide services and communities to optimize educational opportunities for the children, schools and communities we serve.

FINANCIAL SUMMARY

State School Fund

ESDs receive approximately 4.5% of the State School Fund to provide required services of the Local Service Plan to component districts. The ESD funding formula includes property taxes and state income taxes. For the 2023-24 fiscal year, SOESD has budgeted \$13,881,101 from state sources and \$14,050,000 from local property taxes. These combined amounts equal \$27,931,101 and, when added to the remaining budgeted revenues, total \$29,264,579 of general fund resources.

State School Fund Expenditure Requirement for Local Service Plan

State law requires ESDs to expend at least 90 percent of their State School Fund revenue for services approved by component districts in the Local Service Plan.

Grants and Contracts

SOESD brings additional value to our districts surpassing the requirements of the Local Service Plan by obtaining additional revenue beyond State School Fund allocations. We leverage this additional revenue to enhance or provide additional highly valued services. In addition to general fund revenues, SOESD historically obtains over half (\$51% in 2023-24) of our annual revenue (\$104,143,899 in 2023-24) through grants, contracts, and cooperative services.

Entrepreneurial Services

SOESD engages in entrepreneurial activities with the intent of generating both opportunities and revenue to benefit its component school districts, as well as to improve educational resources and services to benefit the communities of Oregon.



LOCAL SERVICE PLAN

Overview

Southern Oregon ESD provides an array of services to our component districts. Those services have been organized within the four "core service areas" as outlined by ORS 334.175 for our Local Service Plan. We have a long-standing, positive working relationship with our districts and together we annually review and revise services to best meet both individual and collective needs. Our 2024-25 Local Service Plan includes all required core services and additional services identified as needed by our local districts.

Agreements

District Allocations: 90% of SOESD's State School Fund allocation is allocated to each component district based on the previous year's finalized ADMr.

Essential Core: Approximately 5% of the District Allocations will be budgeted for a small district special education allocation, STEPS Plus classroom space, and leadership in core service areas that ESDs are required to provide: school improvement, special education, and technology.

Menu Service Selections: A variety of existing services will be provided on a menu for districts to utilize and additional items may be added for districts to choose from in the future:

- Administration and Business: A variety of administration and business services will be provided through a menu for districts to make selections on a yearly basis.
- School Improvement Services: A variety of school improvement services will be provided through a menu for districts to make selections with a three-year rolling commitment. Districts have already identified initial selections on which this LSP is based and may add to their selections.
- **Student Services:** A variety of special education services are provided through a menu where districts can make selections on a yearly basis.
- **Technology Services:** A variety of technology services will be provided through a menu for districts to make selections with a three-year rolling commitment. Districts have already identified initial selections on which this LSP is based and may add to their selections.

Accounting: Rates for the menu of services are projected estimates, but are calculated as actual cost at year end. Districts' allocations will be billed at year end for actual cost of service utilization from menu selections. Remaining balances of districts' allocations will be distributed to districts. Underfunded service utilization will be billed to districts.

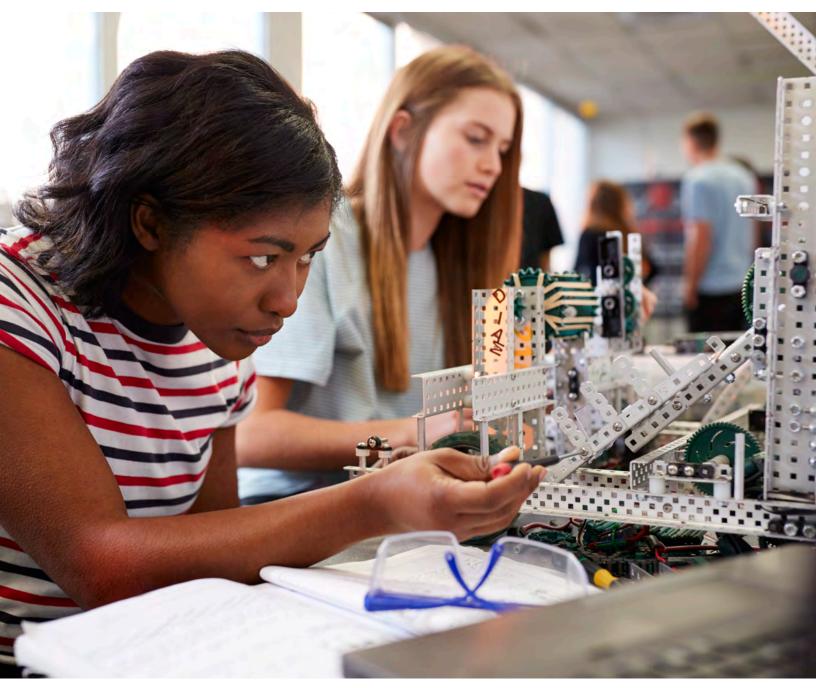
SOESD Service Utilization Levels: To support service stability and quality, each district agrees to utilize a minimum of 30% of their District Allocations available for SOESD services.

Interim Agreements: Intergovernmental agreements between SOESD and component districts can be utilized for excess demand or utilization needs beyond initial base purchase amounts of menu choices (beyond the three-year commitment levels for School Improvement Services and Technology Services).

LOCAL SERVICE PLAN CONT.

Other Services: SOESD offers a variety of additional fee-for-service opportunities such as professional development workshops, cooperative purchasing, and other entrepreneurial services that may include market rate prices. Districts may choose to participate and be billed against their allocations or be invoiced separately depending on the type of opportunity.

Entrepreneurial Fees: Fees are set at the discretion of the ESD for any non-component districts or organizations with revenue to be used for the benefit of component districts.



ADMINISTRATION AND BUSINESS

About Administration and Business Services

SOESD administration works cooperatively with local school districts to offer services that provide equitable educational opportunities for all students. In addition to managing operations of the ESD, the Administration Office facilitates Home Schooling, the Superintendents Association, Business Officials meetings, and a variety of services offered to districts through a menu or as a fee-for-service option:

Civil Rights Coordination

SOESD can be designated as a district civil rights coordinator to meet HB 2881 requirements. SOESD, in collaboration with private investigation services, will assess district compliance with state and federal laws prohibiting discrimination, train staff as prescribed by the ODE, provide guidance on civil rights, coordinate efforts to prevent civil rights violations from occurring and investigate complaints alleging discrimination.

Cooperative Purchasing

The Local Service Plan may be amended at any time by the SOESD board if component districts approve an amendment pursuant to the same criteria used to approve the original plan.

Medicaid Billing

School districts participating in the Medicaid Billing program are reimbursed by a federal program known as Medicaid Administrative Claiming (MAC). The MAC program provides a way of reimbursing K-12 districts for claimable work already being performed by staff.

Substitute Management

SOESD offers recruiting, hiring, training, assignment, payroll, and substitute management services using the Absence Management System for licensed teachers to meet the needs of districts during staff absence.

CONTACT:

- : business@soesd.k12.or.us
- : www.soesd.k12.or.us/business
- **T** (541) 776-8590
- **F** (541) 779-2018
- : 101 North Grape Stree
- : Medford, OR 97501

Services provided to component districts at no additional cost:

Superintendents Association Meetings

The SOESD Superintendent facilitates meetings throughout the year of area superintendents to enhance educational opportunities for students in the region.

Business Officials Meetings

The SOESD Business Manager facilitates meetings throughout the year of area business officials to enhance educational opportunities for students in the region.

Home Schooling

SOESD provides a centralized registration process for students residing within the thirteen school districts in Jackson, Josephine, and Klamath counties. Registration is required for all students ages six through eighteen who are not enrolled in either public or private school.

SCHOOL IMPROVEMENT SERVICES

About School Improvement Services

School Improvement Services include a multitude of programs to provide support for children from birth through their post-secondary success. We support schools by acting as a liaison between ODE and our thirteen districts, coordinating regional curriculum directors meetings, promoting kindergarten readiness, managing significant grants that create career pathways aligned with employment opportunities, and supporting specific student populations and interventions as well as technical assistance and professional learning for instructional effectiveness that promotes attendance, student achievement, student behavioral health and wellness, high school graduation, and career readiness.

Career Technical Education (CTE)

The CTE program coordinates a broad system of diverse subject areas aligned with career pathways awarding college credit aligned with the global economy. The program works closely with local high schools, community colleges, and industry to facilitate a Federal Carl D. Perkins consortium grant and the Southern Oregon CTE Consortium (SOCTEC). The CTE Department services include Program of Study Approval, Instructor Appraisal and Certification, Professional Development, Federal Carl D. Perkins grant administration, and technical assistance. Additional staffing for CTE support is provided through SOESD's Student Success Act Comprehensive Support Plan.

College and Career / STEAM Hub

College and Career services coordinate K-12, higher education, business, industry, and community partners to bring rigor, relevance, and hands-on project based, contextualized learning through dual-credit courses aligned with career paths leading to high wage, high skill, and high demand occupations. The program coordinates efforts of advanced and dual credit, Career Technical Education, the STEAM (Science, Technology, Engineering, Arts, and Mathematics) hub, and career related learning experiences for teachers and students. The STEAM Hub maintains a lending library of high-tech equipment that can be checked out by educators for use in their classrooms. A STEAM School Improvement Specialist is available to model the equipment, plan and co-teach

CONTACT:

- school_improvement@soesd.k12.or.us
- : www.soesd.k12.or.us/school_improvement
- **T** (541) 776-8590
- **F** (541) 858-6749
- : 101 North Grape Stree
- Medford, OR 9750

Services provided to component districts at no additional cost:

Child Care Resource Network

The Child Care Resource Network supports the efforts of our Southern Oregon Early Learning Hub, facilitates improvement of child care providers through implementation of the Quality Rating & Improvement System (QRIS), through trainings for providers, as well as business and consumer education to leverage tax benefits and provider networks.

Curriculum Directors Meetings

SOESD facilitates meetings throughout the year of area curriculum directors to enhance educational opportunities for students in the region.

lessons, or observe and provide feedback and support for integration of the equipment into the classroom. The program leverages substantial grant funding to provide service offerings.

Curriculum, Instruction, and Assessment

SOESD provides consultation, planning, and implementation of professional development to increase student success. We support schools by acting as a liaison between ODE and our thirteen districts, coordinating and funding regional training opportunities, facilitating review of instructional and assessment resources, alignment of curriculum and assessment with content standards, and support for teacher effectiveness that promotes student achievement.

Instructional Technology Services / Data Driven Decision Making

SOESD provides training and resources on the effective use of technology for teaching and the use of data driven decision making using relevant metrics by student support teams to provide interventions and wrap-around services that increase student achievement. The program also supports the Southern Oregon Ed Tech Cadre of teachers, and the annual Southern Oregon Ed Tech Summit.

Mentoring New Teachers and Administrators

SOESD provides mentoring for new teachers and administrators through the critical first and second years in their profession. The Mentoring program is built on research that demonstrates increased student achievement and teacher retention, and is expanding support for new teacher induction programs to promote effective instructional practice, lesson and unit design, assessment, and culturally responsive teaching.

SOESD offers a tiered approach for mentoring new teachers and administrators:

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Services provided to component districts at no additional cost:

Family Support and Connections

Family Support and Connections is a statewide program designed to help families meet the challenges of being a parent in the world today. Family Support and Connections is available to TANF clients and any other family that is struggling. A local family advocate is assigned to each family to help develop an individual plan to overcome barriers to success.

Regional Educator Network

As one of ten ESDs chosen by the Educator Advancement Council to facilitate the work of Regional Educator Networks statewide, SOESD coordinates the work of the Southern Oregon Regional Educator Network (SOREN). The aim of SOREN is to increase safety, significance and belonging for all. SOREN works to elevate equity-based decision making, connect improvement efforts across school districts, and leverage resources within the region to provide locally responsive, sustainable, and highly effective professional learning throughout the course of an educator's career. Examples of professional learning currently funded by SOREN include, but are not limited to: New Teacher Launch, Teach from Your Best Self, Crafting Your Equity Lens, Positive Discipline/Belong Partners, Belonging Through Dignity, and Studying Skillful Teaching.

Student Success Act

As provided in the Student Success Act legislation, SOESD is committed to providing all districts in the region with technical assistance and professional learning to implement Student Success Act initiatives and Integrated Programs through customized , just-in-time support. SOESD specialists are available to work collaboratively with districts' Integrated Programs teams to utilize a variety of processes, tools, and facilitation supports. Tier 1: Districts can contract with SOESD to receive technical assistance from a School Improvement Specialist to support best practices in mentoring at a district/systems level.

Tier 2: Districts can contract with SOESD to provide professional learning to districtemployed mentors to ensure they have current researched-based strategies for supporting novice educators and are provided with opportunities to build a professional learning community with SOESD-employed mentors.

Tier 3: Districts can contract with SOESD to provide SOESD-employed mentors at various levels of engagement (example: 45, 60, or 90 hours) of one-to-one support to novice educators.

Migrant Education | Indian Education **English Learners | Southern Oregon** Black/African American Student Success

Migrant Education / Indian Education / EL / SOBAASS services include trainings, presentations and consultations at the building, district, and regional levels to address educational and culturally related academic needs. The program also provides direct academic services to migrant-qualified students, including after school, summer school, and preschool programs designed to support students in meeting challenging academic Reading and Mathematics standards through literacy development. Black and African American youth are supported through management of a consortium of nine districts and two community-based organizations in the region. The program leverages substantial grant funding to provide service offerings.

Regional Achievement Collaboratives

The Southern Oregon Success (SORS) in Jackson / Josephine counties and the Klamath Promise in Klamath County forges connections between schools, community organizations, businesses, and local leaders to drive communities to actively support improving education outcomes



Services provided to component districts at no additional cost:

Southern Oregon Early **Learning Services**

The Early Learning Hub makes resources and supports more available, more accessible and more effective for children and families that have historically been overrepresented in the opportunity gap and underrepresented in services. SOELS identifies the underserved children in their region, evaluates the needs of those children and families, and then works to ensure that programs and services reach them and effectively meet their needs. Hubs are building outcomes-focused collaborations across K-12 schools, early education, health, human services and business.

Suicide Prevention and **Threat Assessment**

SOESD's School Improvement Services and Student Services departments collaborate to provide meaningful and effective support for component districts' suicide prevention, intervention and postvention plans as well as training and technical assistance with the threat assessment process. In addition, SOESD hosts threat assessment case management software in our regional data center, assists with data management, and provides staffing for the juvenile and adult Level II Threat Assessment Team in Jackson County.

beyond the classroom. Focused work includes training on the epigenetics of Adverse Childhood Experiences (ACEs), support for trauma informed approaches and resiliency leading toward healthy communities, and increased metrics from early learning, high school graduation and career success across a lifelong continuum.

STUDENT SERVICES

About Student Services

As part of the broad range of services, training and supports for all learners within the region, the SOESD Student Services Department provides evaluative, consultative, and direct special education services to students with disabilities and served through an IEP (Individualized Education Program). Many Special Education services are available in Jackson, Josephine, and Klamath counties, and some services are also available in Douglas and Lake counties. The OR Project curriculum is available worldwide.

Audiological Services

A full range of diagnostic hearing services are provided for children from birth to high school graduation, including pure tone air and bone conduction testing, visual reinforcement and behavioral observation sound field audiometry, speech audiometry, acoustic immittance testing, otoacoustic emissions testing, hearing aid evaluation and ear mold fitting, custom made swim plugs, sound field amplification and personal FM systems.

Assistive Technology Services

SOESD maintains a library of assistive technology for loan as needed, as well as assistance researching and procuring assistive technology to meet the needs of learners within the Southern Oregon region.

Autism Services

Autism specialists work in collaboration with school psychologists, speech and language pathologists, and special education teachers in providing comprehensive evaluations for students birth to age twenty-one. Based on evaluative data, specialists recommend, develop, model, and train district and EI/ECSE staff in a variety of intervention and treatment strategies to address student needs.

CONTACT:

- : student_services@soesd.k12.or.us
- : www.soesd.k12.or.us/special_education
- **T** (541) 776-8590
- **F** (541) 535-2640
- : 5465 S. Pacific Highwa
- Phoenix, OR 97535

Services provided to component districts at no additional cost:

Early Intervention / Early Childhood Special Education / Gilbert Creek Child Development Center

Early Intervention (EI) and Early Childhood Special Education (ECSE) services are provided to children from birth through five years of age, under provisions of the Individuals with Disabilities Education Act. Josephine County Early Intervention Services offers many services to support families and their children with special needs.

Long Term Care and Treatment (LTCT)

Long Term Care and Treatment (LTCT) provides education programs for students who have been placed by state agencies, school districts, or private placement in day and residential treatment facilities. The goal of Long Term Care and Treatment Education Programs is to provide a high quality, therapeutic environment where children will gain the behavior skills and abilities to function successfully in a non-institutional environment.



Behavioral and Mental Health Services

The SOESD Student Services department, in collaboration with the School Improvement department, provides multi-tiered mental health services, behavioral intervention services, and embedded coaching/support for students across all the continuum of need. In addition to direct student services. SOESD offers staff training, technical assistance, and consultation to component districts to support student wellbeing, self-regulation, and behavioral success.

Deaf and Hard of Hearing Services

American Sign Language interpreters, as well as direct instruction and consultative services provided by teachers of the deaf and hard of hearing, are available to eligible students birth to age twenty-one.

Evaluation Services - Early Intervention / Early Childhood Special Education

Evaluation services are available in Josephine County by our Early Intervention (EI) and Early Childhood Special Education (ECSE) program for children from birth through five years of age to meet child find requirements, in addition to the many services offered to support families and their children with special needs.



Services provided to component districts at no additional cost:

Regional Programs for Low Incidence Disabilities

SOESD acts as one of Oregon's eight Regional Programs for students identified as regionally eligible with the districts' IDEA funding added to additional state funding. As the Southern Oregon Region III Program, SOESD provides special education services to children from birth through age twenty-one with hearing impairments, vision impairments, deaf/blindness, autism spectrum disorders, severe orthopedic impairments, and traumatic brain injury in a five-county area (Jackson, Josephine, Klamath, Douglas, and Lake Counties).

Special Education Directors **Meetings**

SOESD facilitates meetings throughout the year for district special education directors. These meetings provide an opportunity to explore relevant topics related to special education best practices and resources, as well as gather input on support needed within the component districts and explore potential solutions collaboratively.

Transition Network Facilitator – Region V

The role of the Transition Network Facilitator (TNF) is to support the Governor's Executive Order 15-01 to further improve Oregon's systems of designing and delivering employment services for students with disabilities. The TNF works to support the collaborative efforts of Vocational Rehabilitation and Local Education Agencies in Oregon in the implementation of the Workforce Innovate Opportunity Act and the provision of Pre-Employment Transition Services.



Oregon Project for Visually Impaired and Blind Preschool Children (OR Project)

The OR Project is a comprehensive assessment and curriculum designed for use with children birth to six who are visually impaired or blind.

Orthopedic Impairment Services

Occupational and Physical Therapists provide evaluative, consultative, and direct therapy services necessary for students with orthopedic impairments to meaningfully access their educational opportunities and environments. Physical therapy (PT) focuses on postural and gross motor functioning such as head control, sitting, and standing balance. Occupational therapy (OT) focuses on fine motor functioning such as reach/grasp, manipulation, release of objects and coordination of two-handed activities.

Psychological Services

School Psychologists provide a broad range of consultative services to administrators, teachers, and parents, as well as direct evaluative and intervention services to students.

School Nursing Services

Students attending schools may have a variety of chronic and acute health conditions, such as seizures, asthma, diabetes, and severe allergies. Some students may require medical assistive devices and procedures, such as gastric tube feeding, oxygen administration, suctioning, or nebulizer treatments. School nurse consultants help school districts meet the needs of these students, and maintain compliance with Oregon rules and statutes, working under the requirements of both the Oregon Board of Education and the Oregon State Board of Nursing.

STUDENT SERVICES CONT.

Special Education Automation Software (SEAS)

SEAS is a 100% web based special education management system comprised of several modules which together allow districts to manage their special needs programs, including: IEP and forms management, timeline compliance, Medicaid claim generation, assessment reports, and more.

Speech and Language Services

Speech and Language Services provides a broad range of direct and consultative services, including individual speech/language evaluations, participation on IEP teams, individual and group therapy, and co-teaching in language mediated subjects to increase language acquisition and verbal fluency.

STEPS CARE

STEPS CARE classrooms serve students ages five through twenty-one with severe and/or multiple disabilities, including severe intellectual disability, autism, orthopedic impairment, traumatic brain injury, and complex ongoing medical health needs.

STEPS Plus

Students enrolled in STEPS Plus represent a distinct population of students who present difficult and challenging behaviors. They have multiple, severe disabilities, cognitive deficits and/or significant medical/health needs. The disabilities may include developmental disability, hearing and vision impairment, communication disorder, orthopedic impairment, traumatic brain injury, other health impairment, autism and behavioral disorders.

Vision Impaired Services

Braille production and Itinerant special education services are available to serve all identified blind, low vision, or deaf-blind children, birth through age twenty-one.

Youth Transition Program

The YTP program of Southern Oregon Education ESD serves students with disabilities ages fourteen to twenty-one who are eligible for special education services. The purpose of the program is to prepare youth with disabilities (including on IEP, 504, mental health, physical disability or health impairment) for employment or career related post-secondary education or training.



TECHNOLOGY AND MEDIA SERVICES

About Technology & Media Services

Technology and Media Services provides comprehensive services for local school districts to support administrative and instructional technology to increase student success, resulting in significant cost savings while creating other efficiencies.

Courier

The Courier provides pick-up / delivery of materials and equipment from our Media Center, Cooperative Purchasing warehouse, and Electronics Repair program, as well as interdistrict and intra-district mail.

Data Center Hosting

Computer Information Services administers SOESD's regional 24x7 data center, serving critical information systems to schools. The data center saves hundreds of thousands of dollars on hardware and software, while creating other efficiencies including staff time savings, reduced power consumption, and data center redundancy.

District Data Center Support

System Analysts maintain data centers deployed in component districts and management of data systems migrated to our regional data center, producing savings on server costs, while increasing IT responsiveness, maximizing uptime, and reducing power, cooling, and rack storage requirements.

District Network Support / VoIP Services

Network Analysts provide support for the design, installation, and maintenance of both wired and wireless local and wide area networks, connectivity to the Internet, video security systems, and Voice over IP phone systems.

CONTACT:

- technology@soesd.k12.or.us
- : www.soesd.k12.or.us/technology
- **T** (541) 776-8590
- **F** (541) 858-6749
- 101 North Grape Street
- Medford, OR 97501



Services provided to component districts at no additional cost:

Technology Director Meetings

SOESD facilitates meetings throughout the year of area technology directors to enhance educational opportunities for students in the region.



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Electronic Services

Licensed low voltage and 110v electricians install wired and wireless networks, surveillance systems, access control security systems, and instructional technology such as projectors and electronic white boards. Electronic technicians repair electronic equipment, including iPads and other mobile devices. Electronic materials and devices are provided at greatly reduced wholesale prices.

Follett Destiny

SOESD's Follett Destiny library management software hosted in our regional data center provides access to enriched, educator-reviewed digital content and tools that help students, librarians and educators find, share and use print and digital resources.

Help Desk Software Suite

Computer Information Services produces and hosts the Region-Wide Help Desk for IT departments, print shops, maintenance departments, and more. The software solution provides data tracking and a suite of software tools including asset inventory management and remote technical support capabilities, as well as robust data reporting.

Infinite Visions Hosting

SOESD hosts the Infinite Visions Business Information Services software in our regional data center at reduced costs to districts. Technicians manage service updates and technical support for the system.

Internet Connectivity

Computer Information Services provides cost effective Internet connectivity with access to Internet2 bundled with the benefit of added Internet circuit redundancy, providing substantial and reliable bandwidth to meet the entire region's needs under a single cost savings contract.

Professional Development Management (PDNetworks)

Computer Information Services produces and hosts the PDNetworks software system that allows districts to create and manage staff's TSPC licensing and professional development plans, as well as publish, manage, and track training activities customized to meet districtwide and individual staff goals.

Software Development

Software Developers create mobile applications for school districts, develop web sites, and customize data systems to meet districts' individual student learning and reporting needs.

Southern Oregon Regional Cybersecurity Program

Network Security Analysts utilize network threat assessment and monitoring tools to support a consortium of the region's districts in assessing their cybersecurity stance, monitoring network security, and implementing defense strategies to maintain cyber program health (e.g., email / domain security and data backup integrity), while providing rapid response to cyber threats and attempted intrusion.



STUDENT SUCCESS ACT COMPREHENSIVE SUPPORT PLAN

2024-25

Reducing Academic Disparities and Supporting Student Health and Safety



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PREFACE

This 2024-2025 Student Success Act Comprehensive Support Plan to reduce academic disparities and support behavioral and mental health is provided to assist districts with the development and implementation of their Integrated Plans for the implementation of the Student Success Act. The services are categorized as potentially free technical assistance services from SOESD or direct technical assistance services at a cost. Free services would be funded using funds SOESD receives from the Student Success Act. The services outlined in this reducing academic disparities and behavioral and mental health support model can be used synergistically with services districts provide in their implementation of supports for students' academic achievement and behavioral and mental health using Student Investment Account or other funds.



REQUIREMENTS

According to HB 3427 (2019), an ESD Comprehensive Support Plan must:

- (A) Align with and support school districts in meeting the performance growth targets of the school districts developing the plan;
- (B) Include the provision of technical assistance to school districts in developing, implementing and reviewing a plan for receiving a grant from the Student Investment Account;
- (C) Provide for coordination with the department in administering and providing technical assistance to school districts, including coordinating any coaching programs; and
- (D) Be adopted and amended as provided for local service plans under ORS 334.175.



STUDENT INVESTMENT ACCOUNT SUPPORT PLAN

Overview

This reducing academic disparities and behavioral and mental health support plan is presented in a tiered support model to assist districts with providing universal, group, and individual support. The services outlined in this reducing academic disparities and behavioral and mental health support model can be used synergistically with services districts provide in their implementation of supports for students' academic and behavioral and mental health.

Tier One

Tier One supports will provide a baseline of knowledge and understanding that helps educators meet the needs of all learners. The strategies listed in Tier One will support educators in effective **core interventions in general education with 80-85% of students meeting expectations** in benchmarks. To the extent possible, all professional learning offerings will be culturally and linguistically sensitive.

Tier Two

Tier Two supports will provide additional knowledge and understanding that helps educators meet the needs of all learners. The strategies listed in Tier Two will support educators in effective group support of intense interventions for the 10-15% of students needing more focused interventions to meet expectations. To the extent possible, all professional learning offerings will be culturally and linguistically sensitive.

Tier Three

Tier Three supports will provide specialized knowledge and understanding that helps educators meet the needs of all learners. The strategies listed in Tier Three will support educators in effective individualized support for specific students as the **most intense interventions** and resources or **continuation of intense interventions over a long time period** (anticipated to be a year or more) for students with intense and persistent needs. To the extent possible, all professional learning offerings will be culturally and linguistically sensitive.



TIER ONE: UNIVERSAL SUPPORTS

About Tier One Supports

Tier One supports will provide a baseline of knowledge and understanding that helps educators meet the needs of all learners. The strategies listed in Tier One will support educators in effective **core interventions in general education with 80-85% of students meeting expectations** in benchmarks. To the extent possible, all professional learning offerings will be culturally and linguistically sensitive.

Professional Learning Opportunities:

The ESD could provide the following types of professional learning through a School Improvement Specialist or contracted services.

Technical Support Services - available at no cost:

Professional Learning Opportunities Focused on Reducing Academic Disparities and Behavioral and Mental Health

- Family Engagement Dr. Mapp and Scholastic
 - Scholastic's support is designed to reframe family engagement as an instructional strategy

and build the capacity of district leadership and building teams to transform homeschool partnerships to improve student outcomes.

- Scholastic Education proposes to support all districts in the SOESD region in the following ways:
 - Provide copies of Powerful Partnerships by Dr. Karen Mapp. We will utilize the books to facilitate a three-part virtual book study prior to starting the three-day workshop series. The virtual book study will provide context for the upcoming training series, establish shared understanding of effective home-school partnerships, and foster collaboration and communication among the group.

- Conduct the Dr. Mapp Series with schoolbased teams. Teams will learn "what works" to engage families in learning, "repurpose" existing family events, and develop a yearlong action plan for engaging families in partnerships to increase student academic achievement.
- Provide on-site and virtual coaching to assist district teams' implementation of new learning, and we will provide consultative support to SOESD leadership to assist in strengthening and sustaining family engagement practices throughout the entire district.
- Facilitate Effective Practices to Welcome All Families professional learning opportunities.
- Conduct virtual webinar series on: Process Conditions and 4 C's
- Facilitate Reaching All Families professional learning workshops
- Design and implement Community Engagement Workshops for district leadership based on ODE's Community Engagement Toolkit

In addition to the days of learning, SOESD will offer ongoing coaching and support through regular PLCs and district specific support throughout the academic year.



• Playworks – K-8 Organized Play

Scholastic's support is designed to reframe family engagement as an instructional strategy and build the capacity of district leadership and building teams to transform home-school partnerships to improve student outcomes.

In addition to the days of learning, SOESD will offer ongoing coaching and support through regular CoPs/PLCs throughout the academic year.

Equity Professional Learning Opportunities (including PK)

SOESD will offer professional learning opportunities in foundational equity work. Examples include:

- Recognizing and responding to implicit bias
- Systemic racism
- Micro-aggressions

Universal Design for Learning (UDL)

A framework to improve and optimize teaching and learning for all people based on scientific insights into how humans learn.

Skillful Teaching

37.5 hours (6 days), eligible for three graduate, undergraduate, or para credits through Fitchburg State University.

The Studying Skillful Teaching program is Research for Better Teaching's cornerstone program for building teachers' capacity – the knowledge and skills as well as the courage and conviction – to promote students' motivation, learning, and increased achievement. It is based on the belief that teaching is a process of decision-making and that skillful teachers never stop learning through experimentation, data analysis, study, and collegial sharing about what works best for their students. This reflective dialogue is consistently rated by our clients as an invaluable asset for building common and coherent language among their educators. In addition to the six days of learning, SOESD will offer ongoing coaching and support through regular CoPs/PLCs throughout the academic year.

Regional SOESD Studying Skillful Teaching Facilitator Cadre is being developed to provide sustainability and availability for ongoing professional learning.

Skillful Leadership and Coaching: Analyzing Teaching for Student Results (ATSR)

42 hours (7 days) plus site visit, eligible for three graduate credits through Fitchburg State University.

This is a program for leaders on how to improve classroom teaching and learning. Reflecting the national shift towards learning-focused supervision and evaluation, the Analyzing Teaching for Student Results (ATSR) program helps leaders zero in on the impact of teaching decisions on students. During the program, participants examine high-leverage teaching strategies and use both a common language and a concept system about teaching to support any state framework. The seven-day curriculum provides multiple opportunities for participants to develop keen observation and analytical skills that will support teachers in building their own capacity to impact students' learning. It includes an on-site co-observation with the instructor for each participant.

In addition to the seven days of learning, SOESD will offer ongoing coaching and support through regular PLCs throughout the academic year.

• Social Emotional Learning Professional Learning

To be effective, districts need to adopt and implement comprehensive school-wide SEL programs (research-based) that address the five main areas of SEL in a culturally responsive environment.

SOESD can provide training and curriculum to help districts implement and adapt programs to specific needs of schools/cultures.

In addition to the initial workshop, SOESD will offer ongoing coaching and support for educators through regular CoPs/PLCs throughout the academic year and professional learning in SEL for parents.

• Trauma-Informed Care/Approaches

Professional learning on the strengths-based framework grounded in an understanding of and responsiveness to the impact of trauma that emphasizes physical, psychological, and emotional safety for everyone, and that creates opportunities for survivors to rebuild a sense of control and empowerment.

• K-3 Early Learning Strategies Professional learning on a variety of K-3 reading and math instructional strategies grounded in the Science of Reading Instruction and the Science of Math Instruction which aligns with the latest brain research. SOESD can provide professional learning focused on the identified student needs for teachers and IAs/EAs/ Paraprofessionals.

Adverse Childhood Experiences (ACEs) including PK

Professional learning focused on adverse childhood experiences (ACEs). ACEs are potentially traumatic events that occur in childhood (0-17 years). Creating and sustaining safe, stable, nurturing relationships and environments for all children and families can prevent ACEs and help all children reach their full potential.

• MTSS Implementation for All Areas

Coaching and professional learning supports focused on the development, implementation and sustainability of Multi-Tiered Systems of Support in academics, attendance, SEL, behavior, etc.

Supporting Districts in Developing Kindergarten Readiness Programs to Reduce Academic Disparities

• Kindergarten Readiness Program Development Technical Assistance for Districts

Preschool Promise coordinator, early learning specialists, and other licensed staff employed by SOESD can provide technical assistance to districts who want to establish new Kindergarten Readiness programs and other district level infrastructure such as portable classrooms. These specialists can also provide strategies and coaching to districts regarding the most effective strategies and process to look at all options and requirements.

Kindergarten Readiness Consultant

Support districts to create programs that align with ODE requirements in staffing and certifications.

Supporting Instructional Practices

Mental and Behavioral Supports

SOESD can provide educators with traumainformed mentoring that supports leadership and instructional practices that promote equity, behavior supports, and social-emotional learning for all students.

Reducing Academic Disparities

SOESD can provide educators with content specific mentoring that supports leadership and instructional practices that promote equity, differentiation, evidence-based practices, reduction of academic disparities for historically underserved students, and academic achievement for all students.

- **Beginning Teacher Mentors** SOESD can provide teacher mentors to support beginning teachers with mentoring that supports effective instructional practices, classroom management, and social-emotional learning.
- **Beginning Special Education Mentors** SOESD can provide special education mentors to support Beginning Special Education Mentor teachers with mentoring that supports effective instructional practices, classroom management, and Beginning Special Education Mentor requirements.
- **Beginning Administrator Mentors** SOESD can provide administrators with leadership support. Administrator mentors can support beginning administrators that are working in general education, Beginning Special Education Mentors and central office positions.

• Licensed Mental and/or Behavioral Health Professional FTE

Licensed mental and/or behavioral health professionals who are acculturated to populations they serve assisting students at school with behavioral and/or mental health challenges on all three tiers:

 Tier-One: Classroom lessons on resilience building and self-regulation (Go Noodle, Brain Gym, Mindful Moments and other Mindfulness Activities, Yoga for Kids), implementation of school-wide social emotional curriculum (Second Step, Kelso's Choices, Bully Prevention, etc.).

Technical Support Services available at no cost:

Technical Assistance for Integrated Programs Plan

- Community Engagement Facilitator
 - Professional Learning for Community Organization Facilitators
- Data Analysis
- One-on-One Technical Assistance
- Integrated Plan Review and Consolidated Feedback
- Longitudinal Performance Growth Targets/ Progress Monitoring
- Marketing and Communication
- Translation Services
 - Linguava Provide translation services for documents focused on SIA work.
 Districts will be able to access services from Linguava using funding available in district/eligible charter school Linguava accounts.

TIER TWO: GROUP SUPPORTS

About Tier Two Supports

Tier Two supports will provide additional knowledge and understanding that helps educators meet the needs of all learners. The strategies listed in Tier Two will support educators in effective group support of intense interventions for the 10-15% of students needing more focused interventions to meet expectations. To the extent possible, all professional learning offerings will be culturally and linguistically sensitive.



Technical Support Services available at no cost:

• On Demand Training for Certified and Classified Employees*

SOESD can provide in-person and/or virtual trainings for certified staff new to their position/district or classified staff who are new to working as classroom instructional/educational assistants or are experienced IAs/EAs new to their assignment. Topics to include safely addressing physically aggressive behaviors, verbal intervention strategies, how to work as a team to support students in resource/self-contained classrooms, following Behavior Support Plans, following IEP goals, and strategies for supporting emerging bilinguals.

- **321 Insight** *purchased in April 2020; license active through June 2024* 321 Insight provides online training through their Trauma Informed Series and Para Sharp Series. These are virtual concise and relevant trainings to staff in a format they can easily digest and apply.
- SOESD's webPD These are online, asynchronous course offerings from SOESD on six topics that were selected based on input from the districts and eligible charter schools in the region.

Direct Services – available at cost in partnership with Student Services:

• Licensed Mental and/or Behavioral Health Professional FTE

Licensed mental and/or behavioral health professionals who are acculturated to populations they serve assisting students at school with behavioral and/or mental health challenges on all three tiers:

• Tier-2: small group counseling, social skills building (teaching specific skills such as relaxation/calming skills, problem solving skills, social skills etc.), implementation of evidence-based social emotional programs (Check-in Check-out, "Check and Connect," reinforcement systems, token boards, success plans, self-monitoring sheets, problem solving sheets, etc.).

TIER THREE: INDIVIDUAL SUPPORTS

About Tier Three Supports

Tier Three supports will provide specialized knowledge and understanding that helps educators meet the needs of all learners. The strategies listed in Tier Three will support educators in effective individualized support for specific students as the most intense interventions and resources or continuation of intense interventions over a long time period (anticipated to be a year or more) for students with intense and persistent needs. To the extent possible, all professional learning offerings will be culturally and linguistically sensitive.

Direct Services – available at cost in partnership with Student Services:

Reducing Academic Disparities and Behavioral and Mental Health

• Licensed Mental and/or Behavioral Health Professional FTE

• Tier-3: individual counseling (strategies to address depression, anxiety, anger management, trauma, etc.), crisis de-escalation plans, suicide screening for students at moderate to high risk (interviewing, assessing and communicating with family to establish or strengthen school- and communitybased supports).



SUPPORTS FOR INTEGRATED GUIDANCE

About Supports for Integrated Guidance

The supports for Integrated Programs and Planning/Reporting will provide technical assistance to districts and charter schools eligible to apply independently in the areas of Every Day Matters, High School Success, Career and Technical Education, Early Indicator and Intervention Systems, and Continuous Improvement Planning.



Technical Support Services - available at no cost:

• Every Day Matters (EDM)

SOESD will work with individual districts and regionally to design and implement professional learning and technical assistance focused on reducing chronic absenteeism. Examples include coaching for school attendance teams, data support using the Chronic Absenteeism Prediction Tool (CAPT), attendance letters, regional attendance collaboratives and monthly attendance inspiration meetings, and supporting the development of community partnerships for supporting attendance.

• Small/Rural District Support

SOESD will provide technical assistance to help reduce administrative burden to districts identified by ODE as being eligible based on their designation as small/rural.

• High School Success (HSS)

The Career Connected Learning (CCL) Team will work with the Southern Oregon CTE Consortium (SOCTEC) and higher education partners to support planning and application efforts designed to meet HSS requirements to establish or expand district and/or regional efforts and programming for Career and Technical Education and College-level education opportunities.

- Career and Technical Education (CTE) The CTE program coordinates a broad system of diverse subject areas aligned with career pathways awarding college credit aligned with the global economy. The program works closely with local high schools, community colleges, and industry to facilitate a Federal Carl D. Perkins consortium grant and the Southern Oregon CTE Consortium. The CTE Department services include Program of Study Approval, Instructor Appraisal and Certification, Professional Development, Federal Carl D. Perkins grant administration, and technical assistance. Project Managers are available through SSA funding to support CTE at the intersectionality with SSA, specifically as it relates to the CTE and HSS sections of the Integrated Plan.
- Early Indicator and Intervention Systems (EIIS)

Interested districts may enter into a consortium agreement with SOESD for the purchase of and support with EIIS.

• Continuous Improvement Planning Specialists will be available to work with individual schools, districts, and regionally to offer technical assistance and/or professional learning that supports the Every Student Succeeds Act (ESSA).

BALLOT

SOUTHERN OREGON EDUCATION SERVICE DISTRICT 2024-2025 LOCAL SERVICE PLAN & STUDENT SUCCESS ACT COMPREHENSIVE SUPPORT PLAN

According to ORS 334.175, Southern Oregon Education Service District's component school district boards must take formal action to approve the 2024-2025 SOESD Local Service Plan on or before March 1, 2024. According to HB 3427 (2019), an ESD Comprehensive Support Plan must be adopted and amended as provided for local service plans under ORS 334.175. After board action, please record your school district board's vote below and return this ballot to the SOESD Office of the Superintendent as soon as board action has occurred.

Approved programs and services within the Local Service Plan and Student Success Act Comprehensive Support Plan will be included in the tentative budget to be submitted to the SOESD Budget Committee. Services are contingent upon adequate funding for next year.

Please forward your signed ballot no later than Friday, March 1, 2024



YES

The school district board approves the 2024-2025 Local Service Plan and Student Success Act Comprehensive Support Plan as presented.



NO

The school district board does not approve the 2024-2025 Local Service Plan and Student Success Act Comprehensive Support Plan as presented.

Name of School District

Signature of Superintendent

Date of Board Action



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Ashland School District IPM Program

Integrated Pest Management Program Ashland School District 5

Revision #2 January 31, 2024

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I. INTRODUCTION

Structural and landscape pests can pose significant problems in schools. Pests such as mice and cockroaches can trigger asthma. Mice and rats are vectors of disease. Many children are allergic to yellow jacket stings. The pesticides used to remediate these and other pests can also pose health risks to people, animals, and the environment. These same pesticides may pose special health risks to children due in large part to their still-developing organ systems. Because the health and safety of students and staff is our first priority – and a prerequisite to learning – it is the policy of Ashland School District to approach pest management with the least possible risk to students and staff. In addition, Senate Bill 637 (incorporated into ORS Chapter 634 upon finalization in 2009) requires all school districts to implement integrated pest management in their schools. For this reason, the Ashland School Board has adopted this integrated pest management plan for use on our district campuses.

II. WHAT IS INTEGRATED PEST MANAGEMENT?

Integrated Pest Management, or IPM, is a process for achieving long-term, environmentally sound pest suppression through various tactics. Control strategies in an IPM program include structural and procedural improvements to reduce the food, water, shelter, and access used by pests. Since IPM focuses on remediation of the fundamental reasons why pests are here, pesticides are rarely used and only when necessary.

IPM Basics

<u>Education and Communication</u>: Education and communication are the foundation for an effective IPM program. We need to know what conditions can cause pest problems, why and how to monitor for pests, and how to properly identify pest behavior and biology before we can manage pests effectively. Communication about pest issues is essential. A protocol for reporting pests or pest conducive conditions and a record of what action was taken is the most important part of an effective IPM program.

<u>Cultural & Sanitation</u>: Knowing how human behavior encourages pests helps you prevent them from becoming a problem. Small changes in cultural or sanitation practices can significantly reduce pest populations. Cleaning under kitchen serving counters, reducing clutter in classrooms, putting dumpsters further from the kitchen door/loading dock, proper irrigation scheduling, and over-seeding of turf areas are all examples of cultural and sanitation practices that can reduce pests.

<u>Physical & Mechanical</u>: Rodent traps, sticky monitoring traps for insects, door sweeps on external doors, sealing holes under sinks, proper drainage and mulching of landscapes, and keeping vegetation at least 24 inches from buildings are all examples of physical and mechanical control.

<u>Pesticides:</u> IPM focuses on remediation of the fundamental reasons why pests are here; pesticides should be rarely used and only when necessary.



III. WHAT IS AN INTEGRATED PEST MANAGEMENT PLAN?

ORS 634.700 defines an IPM plan as a proactive strategy that:

(A) Focuses on the long-term prevention or suppression of pest problems through economically sound measures that:

a) Protect the health and safety of students, staff and faculty;

b) Protect the integrity of campus buildings and grounds;

c) Maintain a productive learning environment; and

d) Protect local ecosystem health;

(B) Focuses on the prevention of pest problems by working to reduce or eliminate conditions of property construction, operation and maintenance that promote or allow for the establishment, feeding, breeding and proliferation of pest populations or other conditions that are conducive to pests or that create harborage for pests;

(C) Incorporates the use of sanitation, structural remediation or habitat manipulation or of mechanical, biological and chemical pest control measures that present a reduced risk or have a low impact and, for the purpose of mitigating a declared pest emergency, the application of pesticides that are not low-impact pesticides;

(D) Includes regular monitoring and inspections to detect pests, pest damage and unsanctioned pesticide usage;

(E) Evaluates the need for pest control by identifying acceptable pest population density levels;

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(G) Excludes the application of pesticides on a routine schedule for purely preventive purposes, other than applications of pesticides designed to attract or be consumed by pests;

(H) Excludes the application of pesticides for purely aesthetic purposes;

(I) Includes school staff education about sanitation, monitoring, and inspection and about pest control measures;

(J) Gives preference to the use of nonchemical pest control measures;

(K) Allows the use of low-impact pesticides if nonchemical pest control measures are ineffective; and

(L) Allows the application of a pesticide that is not a low-impact pesticide only to mitigate a declared pest emergency or if the application is by or at the direction or order of, a public health official.

The above definition is the basis for Ashland School District's IPM plan. This plan clarifies the required strategy from ORS 634.700 – 634.750 for the Ashland School District.

Note: As mentioned above, ORS 634.700 allows for the routine application of pesticides designed to be consumed by pests. To avoid a proliferation of pests and/or unnecessary applications of pesticides, several steps must be taken before **any** "routine" applications are allowed:

1) Staff must be educated on sanitation, monitoring, and exclusion as the primary means to control the pest.

2) An acceptable pest population density level must be established.

3) The use of sanitation, structural remediation, habitat manipulation, or of mechanical or biological control methods must be incorporated into the management strategy of the pest.

4) Documentation that the above steps could have been more effective.

5) The pesticide label must be read thoroughly to make sure the pesticide will be used in strict compliance with all label instructions.

IV. SCHOOL DISTRICT IPM PLAN COORDINATOR

Note: ORS 634.720 states that the Coordinator "must be an employee of the governed district, unit, or school or entity, unless the governing body delegates pest management duties to an independent contractor."

The Facilities Director designates Todd Luke as the IPM Plan Coordinator. The Coordinator is critical to successful IPM implementation in Ashland School District and is given the authority to implement and evaluate this plan. The Coordinator is responsible for:

A. Attending not less than six hours of IPM training each year

The training will include a general review of IPM principles and the requirements of ORS 634.700 – 634.750. It will also include hands-on training on updated exclusion practices, monitoring and inspection techniques, and management strategies for common pests.

Note: ORS 634.720 requires IPM plan coordinators to complete six hours of training each year. Contact your property and liability insurance provider, your Education Service District, or the OSU School IPM Program for information on IPM coordinator training courses that cover the above.

B. Conduct outreach to the school community (custodians, maintenance, construction, grounds, faculty, and kitchen staff) about the school's IPM plan. The IPM Plan Coordinator (or designee) will provide training as outlined in Section VII below.

C. Overseeing pest prevention efforts;

The Coordinator will work with custodians, teachers, and maintenance to reduce classroom clutter and food and seal up pest entry points.

D. Assuring that the decision-making process for implementing IPM in the district (section V) is followed;

The Coordinator will continually assess and improve the pest monitoring/reporting/action protocol.

E. Assuring that all notification, posting, and recordkeeping requirements in section VI are met when the decision to make a pesticide application is made;

F. Maintaining the approved pesticides list as per section VIII; and

G. Responding to inquiries and complaints about noncompliance with the plan. Responses to inquiries and complaints will be written and recorded by the Coordinator.

V. IPM DECISION-MAKING PROCESS

A. Responsibilities of School District Employees

1. IPM Plan Coordinator Responsibilities

See Section IV above

2. Custodial Services Responsibilities

Custodial Services staff is responsible for the following:

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1) Periodic IPM training provided by the ASD Safe Schools Trainings.

2) Checking sticky insect monitoring traps in staff lounge, cafeteria, and kitchen as per the IPM Plan Coordinator's instructions.

3) Keeping records of pest complaints using electronic communication in addition to work orders, and verbal.

4) Assuring floor under serving counters is kept free of food and drink debris.

5) Sealing up small cracks or holes when reported by teachers or noticed as needed.

6) Reporting his/her pest management actions in email to the IPM Coordinator.

7) Reporting pest problems that he/she cannot resolve in a timely manner to the IPM Plan Coordinator.

8) Reporting Staff to the IPM Plan Coordinator who need assistance to reduce clutter and other pest-conducive conditions in their classrooms in a positive way.

9) Reporting pest-conducive conditions to the IPM Plan Coordinator if the custodian cannot fix them in a timely manner.

10) Confiscating any unapproved pesticides (such as aerosol spray cans) discovered during inspections or regular duties and delivering them to the IPM Plan Coordinator.

11) Following up on issues found during inspections as instructed by the IPM Plan Coordinator (IPM Plan Coordinator will determine which schools receive indepth inspections based on pest and incident history).

3. Facilities/Maintenance/Construction Responsibilities

Staff involved in Facilities Maintenance and construction is responsible for working with the IPM Plan Coordinator to ensure their daily tasks, projects and operations enhance effective pest management. This includes:

1) Receiving instruction from the IPM Plan Coordinator (or designee of the Coordinator) on the basic principles of IPM, sealing pest entry points, and sanitation during construction projects as needed.

2) Continually monitoring for pest conducive conditions during daily work, and sealing small holes and cracks when noticed, or scheduling through a work order.

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3) Working in conjunction with the Coordinator to develop a protocol and priority list through the work order software for: sealing holes, installing external door sweeps, and other pest exclusion needs on larger projects.

4) Developing protocols and provisions for pest avoidance and prevention during construction and renovation projects. The IPM Plan Coordinator has the authority to contact the Facilities Director if these protocols and provisions are not being met.

4. Grounds Department Responsibilities

Grounds crews are responsible for:

1) Taking periodic IPM training provided by the ASD Safe Schools Trainings.

2) Keeping vegetation (including tree branches and bushes) at least three feet from building surfaces.

3) Proper mulching in landscaped areas to reduce weeds.

4) Proper fertilization, over-seeding, mowing height, edging, drainage, aeration, and irrigation scheduling in turf areas to reduce weeds (see OSU turf management publications EC 152, EC 1278, EC1550, EC 1638-E, and PNW 299 - available free online at http://extension.oregonstate.edu/catalog/).

5) When the decision is made to apply a pesticide, following notification, posting, record-keeping and reporting protocols in Section VI. After attaining Ashland School Board approval.

5. Kitchen Staff Responsibilities

Kitchen staffs are responsible for:

1) Taking periodic IPM training provided by the ASD Safe Schools Training's

- 2) Assuring floor under serving counters is kept free of food and drink debris.
- 3) Promptly emptying and removing corrugated cardboard materials.
- 4) Keeping exterior kitchen doors closed.
- 5) Reporting pest conducive conditions that require maintenance (e.g., leaky faucets, dumpster too near building, build-up of floor grease requiring spray- washing, etc.) to proper staff either orally or using electronic communication.
- 6) Participating in any inspections conducted by custodian or IPM Plan Coordinator
- 7) Checking sticky trap monitors as needed for cockroaches or drain flies. Immediately reporting these pests and any sightings of rodents or rodent droppings to custodian and in electronic communication to IPM Coordinator.

6. School Faculty Responsibilities

School faculties are responsible for:

1) Taking IPM training as needed provided by ASD Safe Schools trainings.

2) Keeping their classrooms and work areas free of clutter.

3) Making sure students clean up after themselves when food or drink is consumed in the classroom.

4) Reporting pests and pest conducive conditions to the custodian, verbally or by electronic communication.

5) Following first steps of protocol for ant management before notifying the custodian (clean up any food the ants are eating, kill visible ants, wipe down area where ants were with soapy water, notify custodian only if ants continue to be found after following these steps).

7. School Principal Responsibilities

The School Principal is responsible for:

1) Scheduling time for teachers to take IPM ASD Safe Schools Trainings as needed.

2) Taking IPM ASD Safe Schools Trainings as needed.

3) Assuring that teachers keep their rooms clean and free of clutter in accordance with the IPM Plan Coordinator's instructions.

4) Assuring that all faculties, administrators, and staff know that the Ashland School District does not use Pesticides or herbicides unless approved by the Ashland School Board in advance and applied by a licensed Vendor.

5) Working with the IPM Plan Coordinator to make sure all notifications of pesticide applications reach all faculty, administrators, staff, adult students and parents (via website and email notification).

6) Assuring that all staff fulfills their role as outlined in the district's IPM plan (reducing pest conducive conditions, participation in monitoring and pest log recording, taking needed IPM training(s), cooperation with the district's IPM Plan Coordinator).

B. Monitoring – Reporting – Action Protocol

<u>Monitoring is the most important requirement of ORS 634.700 – 634.750</u>. It is the backbone of Ashland School District's IPM Program. It provides recent and accurate information to make intelligent and effective pest management decisions. It can be defined as the regular and ongoing inspection of areas where pest problems do or might occur. Information gathered from these inspections is always retained digitally.

Monitoring should be incorporated into the daily activities of school staff as much as possible. Staff training on monitoring should include what to look for and how to record and report the information.

1. Three levels of monitoring

There are three levels of monitoring:

- 1) Casual observing/looking with no record-keeping is not helpful
- 2) Casual observing/looking with written observations can be useful
- 3) Careful inspections with written observations are always useful

Level 2 monitoring (all staff)

All staff will be trained to improve their "casual observing/looking" to level 2 and to report any pests and pest-conducive conditions they observe. Level 2 monitoring is conducted by faculty, administration, maintenance/construction, kitchen staff, school nurses, etc.

After completing ASD Safe Schools Training on pests and pest conducive conditions, staff will be expected to report pests or pest conducive conditions they observe during the normal course of their daily work.

Reporting will be done by recording observations electronically or reporting them to the custodian for them to make a record of it. Custodial, maintenance and kitchen staff are expected to set and/or check sticky monitoring traps per the district's IPM plan as needed.

Level 3 monitoring (Coordinator and Custodial staff)

The IPM Plan Coordinator (or designee) and Custodians will periodically monitor level 3. The Coordinator and Custodial staff will monitor structures:

- Pest conducive conditions inside and outside the building (structural deterioration, holes that allow pests to enter, conditions that provide pest harborage)
- The level of sanitation inside and out (waste disposal procedures, level of cleanliness inside and out, conditions that supply food and water to pests)
- The amount of pest damage and the number and location of pest signs (rodent droppings, termite shelter tubes, cockroaches caught in sticky traps, etc.)

- Human behaviors that affect the pests (working conditions that make it impossible to close doors or screens, food preparation procedures that provide food for pests, etc.)
- Their management activities (caulking/sealing, cleaning, setting out traps, treating pests, etc.) and their effects on the pest population.

<u>Level 3 monitoring (Grounds staff)</u> Grounds staff will monitor Turf and Landscape:

- The condition of the plants (vigor and appearance)
- The amount of plant damage
- pH, phosphorus, and potassium levels of turf (soil test as needed)
- Type and abundance of pests (weeds, insects, mites, moles, etc.) and natural enemies (ladybugs, spiders, lacewing larvae, syrphid fly larvae, etc.)
- Weather conditions (record any unusually dry, hot, wet, or cold weather as needed)
- Proper drainage
- Human behaviors that affect the plants or pests (foot traffic that compacts the soil, physical damage to plants caused by people, insistence on having certain plants grow in inappropriate situations, etc.)
- Management activities (pruning, fertilizing, mulching, aeration, treating pests, etc.) and their effects on the plants and the pest population.

2. Sticky monitoring traps for insects

Affected staff will be made aware of traps and their purpose so they don't disturb them.

3. Reporting (pests, signs of pests, and conducive conditions)

When staff observe pests or pest conducive conditions, they should report them to the custodian for them to communicate to the IPM Coordinator.

4. Reporting "Pests of Concern"

"A pest of concern" is a pest determined to be a public health risk or a significant nuisance pest. These include cockroaches (disease vectors, asthma triggers), mice & rats (disease vectors, asthma triggers), yellow jackets (sting can cause anaphylactic shock), cornered nutria, raccoons, cats, dogs, opossums, skunks (they can bite), and bed bugs (significant nuisance pest).

When pests of concern (or their droppings, nests, etc.) are observed, staff should immediately tell the building custodian and IPM Coordinator.

5. Action!

a) <u>Structural</u>

Any items (such as sealing up holes) that maintenance/construction staff or custodial staff observes should be taken care of, or a work request issued.

The Coordinator will monitor the completion of the work order. If the work is not completed as expected, the Coordinator may write a follow-up e-mail to the Facilities Director.

The Coordinator will keep records of time and money spent to manage the pest, including copies of original receipts.

Small Ants:

When staff observes a small number of ants (under ten (10) ants), they must:

1st) Spend two minutes trying to find out where the ants are coming from

2nd) Kill the ants with a paper towel or similar

3rd) Remove any food or liquid the ants were eating

4th) Wipe down the area with soapy water or disinfectant to remove pheromone trails

5th) Record the above electronically as prudent.

If the ants come back or there are more than a small number (under 10 ants) of them:

1st) Spend two minutes trying to find out where the ants are coming from

2nd) Record the above electronically as prudent.

3rd) Ask the custodian to come with a vacuum and sealant as soon as they are able.

- 1st) Try to find out where the ants may be coming from.
- 2nd) Vacuum up the ants and any food debris nearby.
- 3rd) Seal up the crack or hole from which the ants were coming.
- 4th) Wipe down the area with soapy water or disinfectant to remove pheromone trails
- 5th) Record as prudent.

b) <u>Grounds</u>

When pests on the grounds reach a threshold established by the Grounds staff, lead, and the IPM Plan Coordinator, action will be taken as determined by the Coordinator.

A threshold is the number of pests that can be tolerated before taking action. The acceptable threshold for cockroaches, mice, rats, raccoons, cats, dogs, opossums, skunks, and nutria is 0.

The IPM Plan Coordinator will determine acceptable thresholds for other pests.

C. Inspections

1) Routine Inspections

The IPM Plan Coordinator will conduct routine inspections of different schools throughout the year, retain pertinent information for writing the IPM Report, and create best practices for IPM.

2) Annual Inspections

The IPM Plan Coordinator will conduct annual inspections at individual schools and retain pertinent information for use in writing the IPM Report and to create best practices for IPM.

D. Pest Emergencies (see also Section VII. B. below)

<u>IMPORTANT: If a pest emergency is declared, the area must be evacuated and</u> <u>cordoned off before taking other steps</u>. When the IPM Plan Coordinator, after consultation with school faculty and administration, determines that the presence of a pest or pests immediately threatens the health or safety of students, staff, faculty members, or members of the public using the campus or the structural integrity of campus facilities, they may declare a pest emergency. Examples include (but are not limited to) yellow jackets swarming in areas frequented by children, a nutria in an area frequented by children, and half a dozen mice or rats running through occupied areas of a school building.

E. Annual IPM Report (completed by IPM Plan Coordinator)

In January of each year, the IPM Plan Coordinator will provide the Facilities Director with an annual IPM report. The IPM report will include all costs associated with the IPM program.

Prevention and management steps taken that proved to be ineffective and led to the decision to make a pesticide application will be copied and pasted or incorporated into the annual report of pesticide applications (see section VII. D)

VI. REQUIRED TRAINING/EDUCATION

ORS 634.700 (3) (i) requires staff education "Provided by ASD Safe Schools training."

A. IPM Plan Coordinator Training

ORS 634.720 (2) requires the IPM Plan Coordinator "shall complete not less than six hours of training each year. The training shall include at least a general review of IPM principles and the requirements of ORS 634.700 to 634.750."

Content should include health and economic issues associated with pests in schools, exclusion practices, pest identification and biology for common pests, common challenges with monitoring-reporting-action protocols, proper use of sticky insect monitoring traps, and hands-on training on proper inspection techniques.

Contact your Education Service District or the OSU School IPM Program for information on OSU-approved training courses.

B. Training for Custodial Staff

Will be provided by ASD Safe Schools IPM training as needed.

C. Training for Maintenance and Construction Staff

Will be provided by ASD Safe Schools IPM training as needed.

D. Training for Grounds Staff

Will be provided by ASD Safe Schools IPM training as needed. Additional available resources can be found at:

OSU turf management publications EC 1521, EC 1278, EC 1550, EC 163-E, and PNW 299 (free online).

E. Training for Kitchen Staff

Training will be provided by ASD Safe Schools IPM training as needed.

F. Training for Faculty and Principal

Training will be provided by ASD Safe Schools IPM training as needed.

VII. PESTICIDE APPLICATIONS: REQUIRED NOTIFICATION, POSTING, RECORD KEEPING, AND REPORTING

Any pesticide application on school property must be made by a licensed vendor after School Board approval. Proper communication will be made with the affected people.

The IPM Plan Coordinator (or a designee of the Coordinator) will give written notice of a proposed pesticide application (via website and email notification) at least 24 hours before the application occurs.

The notice must identify the name, trademark, or type of pesticide product, the EPA registration number of the product, the expected area of the application, the scheduled date of application, and the reason for the application.

The IPM Plan Coordinator (or a designee of the Coordinator) shall place warning signs around pesticide application areas beginning no later than 24 hours before the application occurs and ending no earlier than 72 hours after the application.

A warning sign must bear the words "Warning: pesticide-treated area" and give the expected or actual date and time for the application, the expected or actual reentry time, and provide the telephone number of a contact person (the person who is to make the application and/or the IPM Plan Coordinator).

A. Notification and Posting for Emergencies

Important Notes:

- 1) The IPM Plan Coordinator may not declare the existence of a pest emergency until after consultation with school faculty, administration, and the Facilities Director.
- 2) If a pesticide is applied at a campus due to a pest emergency, the Plan Coordinator shall review the IPM plan to determine whether modification of the plan might prevent future pest emergencies and provide a report of such to the Facilities Director.
- 3) If prudent, The Facilities Director shall review and take formal action on any recommendations in the report.

B. Notification and Posting for Emergencies

The declaration of the existence of a pest emergency is the only time a non-lowimpact pesticide may be applied.

If a pest emergency is declared, the area must be evacuated and cordoned off before taking any other steps.

If a pest emergency makes it impracticable to give a pesticide application notice no later than 24 hours before the pesticide application occurs, the IPM Plan Coordinator shall send the notice no later than 24 hours after the application.

The IPM Plan Coordinator or designee shall place notification signs around the area as soon as practicable but no later than at the time the application occurs.

Note: ORS 634.700 also allows the application of a non-low-impact pesticide "by, or at the direction or order of, a public health official." If this occurs, every effort must be made to comply with the notification and posting requirements above.

C. Record Keeping of Pesticide Applications

The IPM Plan Coordinator or designee shall keep a copy of the following pesticide product information on file at each head custodian's office at the school where the application occurred and at the office of the IPM Plan Coordinator:

- A copy of the label
- A copy of the MSDS
- The brand name and USEPA registration number of the product
- The approximate amount and concentration of product applied
- The location of the application
- The pest condition that prompted the application
- The type of application and whether the application proved effective
- The pesticide applicator's license numbers and the pesticide trainee or certificate numbers of the person applying the pesticide
- The name(s) of the person(s) applying the pesticide
- The dates on which notices of the application were given
- The dates and times for the placement and removal of warning signs
- Copies of all required notices given, including the dates the IPM Plan Coordinator gave the notices

The above records must be kept on file at each head custodian's office at the school where the application occurred and at the office of the IPM Plan Coordinator for at least four years following the application date.

D. Annual Report of Pesticide Applications

In January, the IPM Plan Coordinator will provide the Facilities Director with an annual report of all pesticide applications made the previous year. This report will be included in the IPM Report. The report will contain the following for each application:

- The brand name and USEPA registration number of the product applied
- The approximate amount and concentration of product applied
- The location of the application
- The prevention or management steps taken that proved to be ineffective and led to the decision to make a pesticide application
- The type of application and whether the application proved effective

Low Impact Pesticide List

Pesticides on this list may not contain a pesticide product or active ingredient with the words "warning" or "danger" on the label. These cannot contain a pesticide product classified as a human carcinogen or probable human carcinogen under the United States Environmental Protection Agency1986 Guidelines for Carcinogen Risk Assessment. These also cannot contain a pesticide product classified as a human carcinogen or likely to be carcinogenic to humans under the United States Environmental Protection Agency 2003 Draft Final Guidelines for Carcinogen Risk Assessment.

ANTS

TERRO ant killer II Liquid Ant Baits (6 pack) EPA Reg. No.149-8

WEEDS Roundup Promax Herbicide EPA Reg.No.524-579

WEEDS Roundup QuikPro Herbicide EPA Reg.No.524-535

WEEDS

RoundUp Pro Concentrate EPA Reg.No.524-529

WASP & HORNET SPRAY Raid Wasp & Hornet Killer EPA Reg. No.4822-553

WASP HORNET YELLOWJACKET Rescue! W-H-Y Attractant EPA Reg.No. 84565-3-49407

Integrated Pest Management

IPM Website Link (Pending approval and Implementation)

Ashland School District 5

Code: **IGBI** Adopted: 5/10/04 Readopted: 6/12/17 Orig. Code(s): IGBI

Bilingual Education**

Students whose primary language is a language other than English will be provided appropriate assistance until they are able to use English in a manner that allows effective, relevant participation in regular classroom instruction and other educational activities.

Parents who are not able to use English in a manner that allows effective, relevant participation in educational planning for their student will be provided with relevant written, verbal or signed communication in a language they can understand.

END OF POLICY

Legal Reference(s):

ORS 336.074 ORS 336.079 OAR 581-021-0046 OAR 581-022-1140

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2006). Every Student Succeeds Act of 2015, 20 U.S.C. §§ 6801-7014.

Ashland School District 5

Code: **IFE** Adopted: 5/10/04 Readopted: 6/12/17 Orig. Code(s): IFE

Curriculum Guides and Course Outlines

Curriculum guides and course descriptions will be available for all courses offered in the district. Academic Content Standards/Common Core State Standards and Essential Skills as adopted by the State Board of Education will be included. Teachers are expected to adhere closely to the course of study adopted by the district. Information regarding course offerings and course descriptions will be available to all students and interested patrons of the district.

END OF POLICY

Legal Reference(s):

ORS 332.075(1) ORS 336.035

OAR 581-021-0045 OAR 581-021-0046 OAR 581-022-0606 OAR 581-022-0807 OAR 581-022-1020 OAR 581-022-1030 OAR 581-022-1130 OAR 581-022-1140 OAR 581-022-1210 OAR 581-022-1340 OAR 581-022-1610



4th and 5th grade students can apply to be a WPL but must show great leadership qualities; like being fair, kind, helpful, maintaining good behaviors and also keeping up on their school work.





We are the Wolf Pack Leaders and we help younger students with 'Small' problems!

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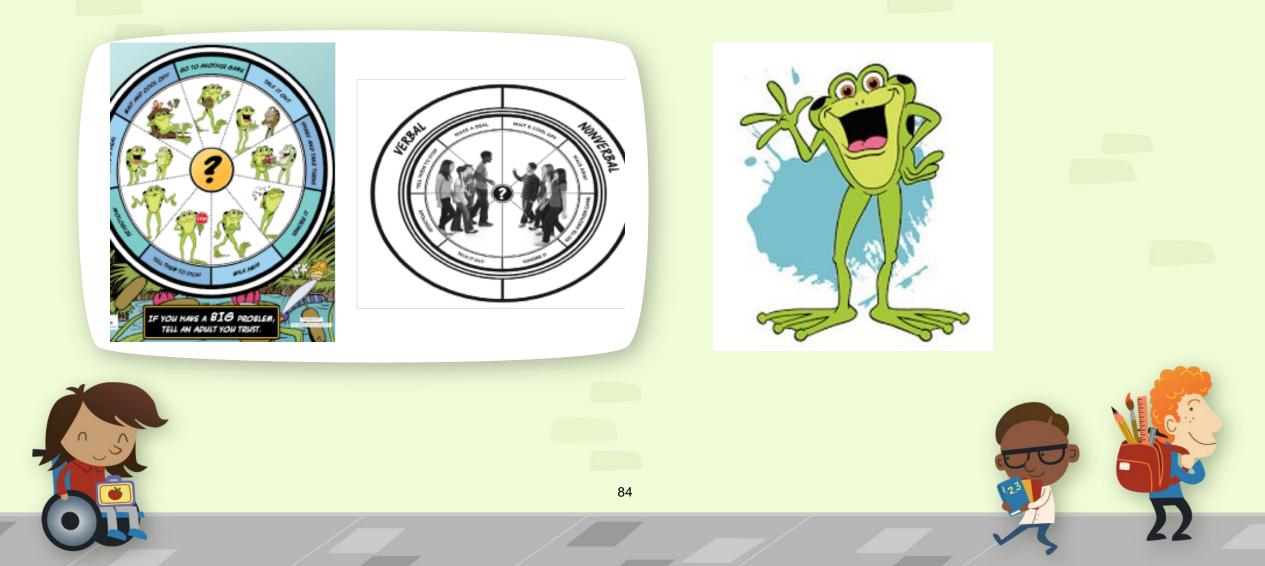


Left to right: Sa'nite, Olivia, Valentina, Yuzu, and Mia are helping at morning recess.





We use Kelso's Choices to help the younger kids solve small problems. If there are big problems we find an adult right away.









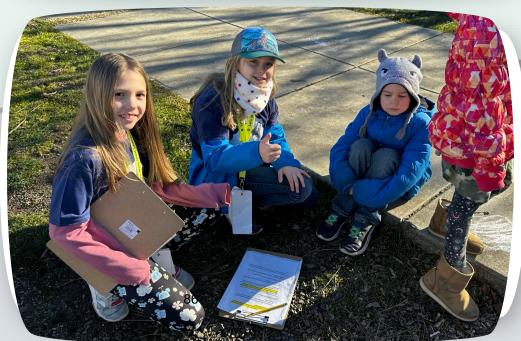
Wolf Pack Leaders do so many things around Walker! They create games or push younger students on the swings. 85











Wolf Pack Leaders also walk students to the office, make Friday announcements, and help younger students find games to play at recess.





Wolf Pack Leaders helped at the Gum Drop Shop this year by helping younger students wrap presents.



Wolf Pack Leaders went into every class to introduce themselves and to explain our Kindness board_s by the library.





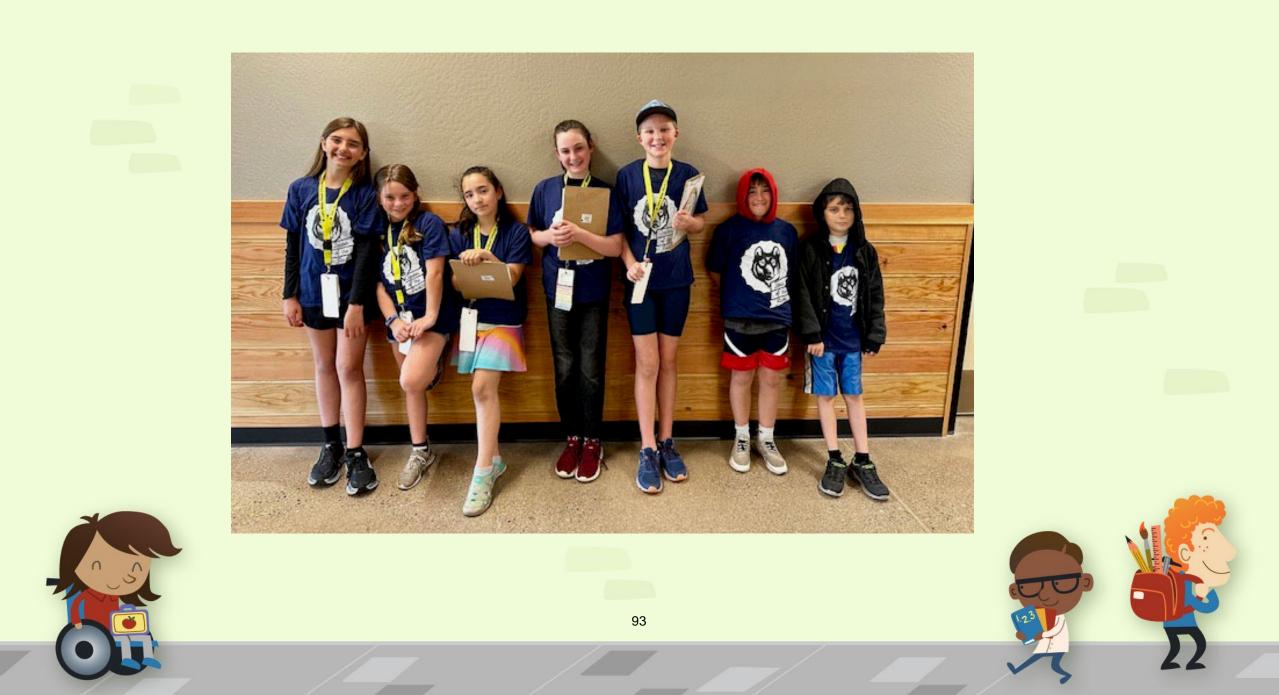








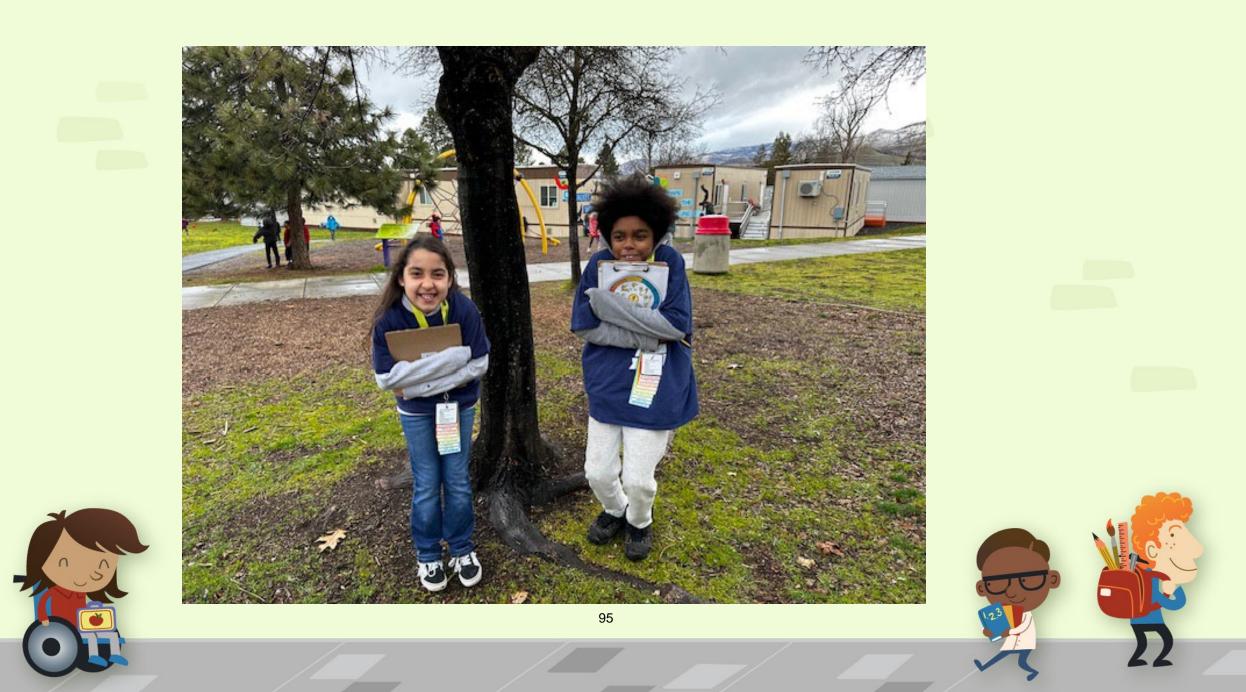


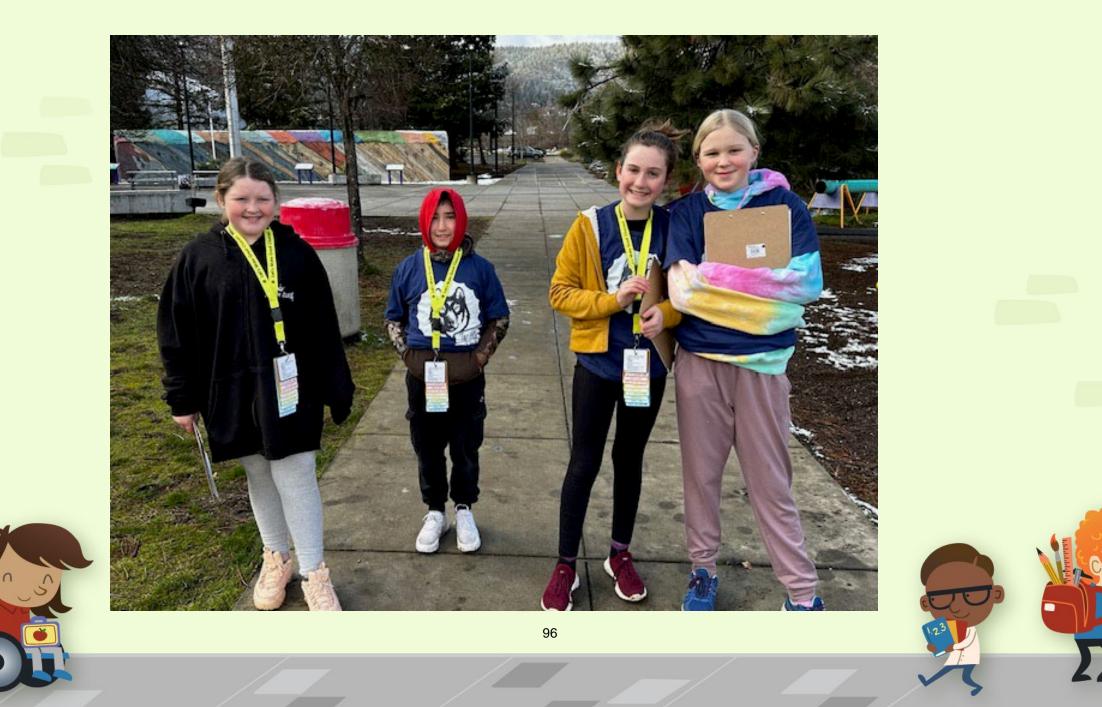


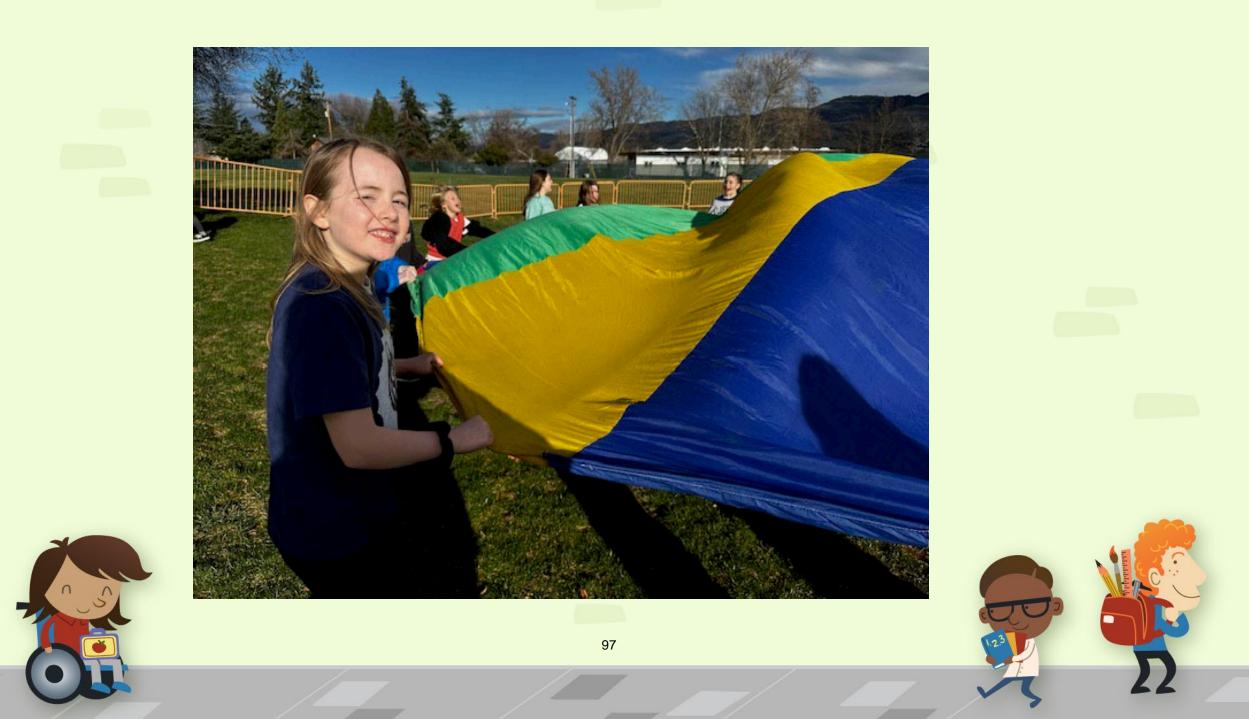




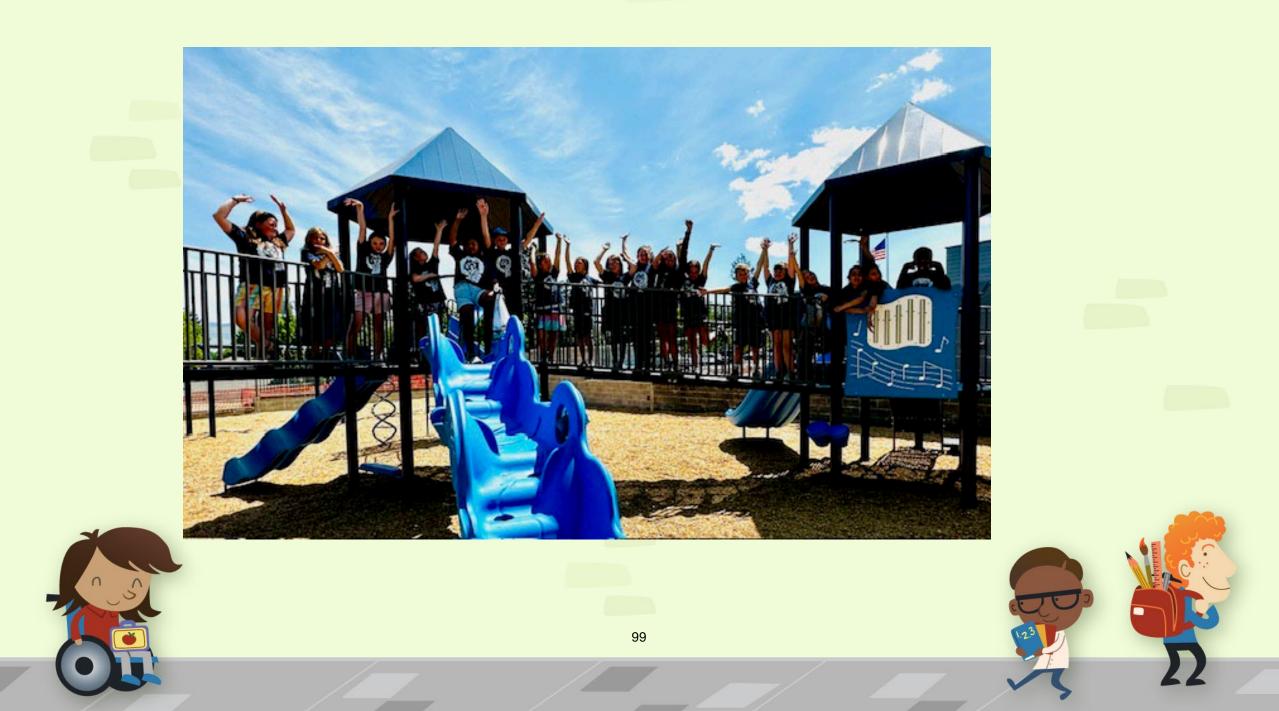
























Thank you for inviting us!!





Classified Employee Appreciation Week

WHEREAS, the education of youth is essential to the future of our community, state, country and world; and

WHEREAS, classified employees are the backbone of our public education system; and

WHEREAS, classified employees work directly with students, educators, parents, volunteers, business partners and community members; and

WHEREAS, classified employees support the smooth operation of offices, the safety and maintenance of buildings and property, and the safe transportation, healthy nutrition and direct instruction of students; and

WHEREAS, our community depends upon and trusts classified employees to serve students; and

WHEREAS, classified employees, with their diverse talents and true dedication, nurture students throughout their school years.

NOW, THEREFORE, BE IT RESOLVED that the Ashland School District Board of Directors proclaims March 4-8, 2024, to be **CLASSIFIED EMPLOYEE APPRECIATION WEEK**; and

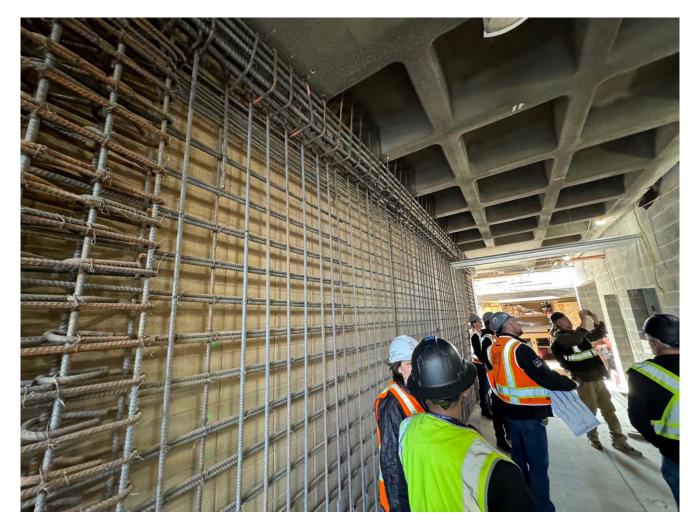
BE IT FURTHER RESOLVED that the Ashland School District Board of Directors strongly encourages all members of our community to join in this observance, recognizing the dedication and hard work of these individuals.

Adopted this 8th day of February, 2024.

Signed:

Rebecca Dyson, Chair Ashland School District Board of Directors Samuel Bogdanove Superintendent





Ashland High School Humanities Building Structural Reinforcement

ASHLAND SCHOOL DISTRICT CAPITAL BOND PROGRAM

END OF MONTH REPORT – JANUARY 2023



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HMKCO.ORG



GENERAL PROGRAM UPDATE

January consisted of great progress on the Ashland High School project. With the construction team now able to work on both the first and second floors of the Humanities building and on Phase 1 of the Science floor in the Science building, a lot of work is being done. In addition, bids were received for the remainder of the Science portion of the project and are in the process of being vetted.

PROJECT ADMINISTRATION

Project administration and accounting support are two key areas critical to Program success. This is a combined effort of HMK Company and ASD Accounting Department. In the month of January, we requested 4 purchase orders and processed 18 invoices.

Contract Type	Number of Contracts	Value	
Professional Service Agreements / Design Contracts	1	\$ 21,973,222	
Construction Contracts	3	\$ 94,683,288	





LOCAL VENDORS AND CONTRACTORS

The following list of local vendors are currently working on the projects.

ASHLAND AREA VENDORS and CONTRACTORS

Arkitek:design&architecture Ciota Engineering Covey Pardee Landscape Architecture **Douglas Engineering Pacific** HMK Company KenCairn Landscape Architecture Bean Electric Renfro Pariani Land Surveying **Powell Engineering** ZCS Engineering & Architecture Beflor Top Notch Sandeen Masonry Metal Masters Moore Construction Devry Precision Electric Hall of Fame Movers Milestone Landscape Group Figueroa's Lanscaping & Construction North Core Excavation

Adroit Construction Co. DOBRIN Infinity Electric Van Row Mechanical **Cascade** Communications **Quality Fence** Pacific 3D Reality Capture Welburn Electric Britannia Patriot Landscaping Sandeen Masonry Alco **Quality Fence** S&S Sheetmetal Urban Racks Curtis Huntley Cut N' Break Advanced Air New Horizons Woodworks Viking Concrete Cutting Artoff Construction

Ashland Area, defined as Rogue Valley





ASHLAND MIDDLE SCHOOL & TRAILS

PROJECT ADDITION & RENOVATIONS TO EXISTING BUILDING

PROJECT DESCRIPTION

- New and renovated classroom space to replace 3 existing classroom wings, approx. 65,000 sq. ft.
- Campus security
- Air Quality improvements and Climate resilience for existing buildings, including new construction
- Required tech infrastructure

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	08/12/19	11/15/19	100%	
Design Development	12/09/19	02/28/20	100%	
Construction Documents	03/23/20	08/07/20	100%	
Bid and Award Site Package	10/27/20	11/02/20	100%	
Bid and Award Building Package	10/27/20	11/02/20	100%	
Construction	11/03/20	10/21/22	100%	
Substantial Completion	10/21/22	03/01/23	100%	
Owner Occupancy	08/24/22	10/31/22	100%	
Post Occupancy Evaluation	03/01/23	12/21/23	100%	
Warranty Period	03/01/23	03/01/24	91%	
Other			0%	

CURRENT ACTIVITIES

Ashland Middle School and TRAILS Outdoor School are complete, and staff and students are fully occupying the new spaces.

Throughout each campus, upgrades in HVAC systems, plumbing, and electrical are prevalent, introducing energy efficiency air quality improvements and climate resilience resulting in more accommodating environments for maximum learning opportunities. Each school has received upgraded widows, new roof systems, new restrooms and redesigned administrative/office spaces. The project also resulted in improvements to overall campus security, technology infrastructure, seismic upgrades and accessibility. Both schools have been retrofitted with fire alarm and fire suppression systems as well. Each school campus has its own vehicle entry and exit with clear-cut pick up and drop off areas to assist with reduced congestion during high traffic periods.





Ashland Middle School comprises about 40,000 sq. ft. of the project including a new library and addition of a newly constructed two-story 6th grade building with an elevator. The campus includes a leadership room with full kitchen designed to host campus events. The SPED area includes multiple classrooms and offices with an additional calming space, private restrooms, and secure outdoor learning area. The covered courtyard is central to the campus with a multifunctional design including reclaimed wood beam stadium style benches for outdoor educational purposes and skateboard accommodating features allowing students a safe and fresh outdoor space for various activities. The kitchen and cafeteria have also been upgraded with new appliances and renewed finishes.

TRAILS Outdoor School has an entirely separate, newly renovated building stretching across 26,000 sq. ft. of useable space. The campus now includes 5 classrooms, a library, art lab, testing room, SPED room, music facility and multi-purpose room. There is also a grand outdoor structure attached to the building, allowing activities in adverse weather, including an integrated rock-climbing wall. The multi-purpose room, also known as the community room, is the highlight of the building. This area not only provides a place for staff and students to congregate for events but is equipped with large windows and roll up doors that can be opened to connect to the outdoors. Designing this aspect of the multi-purpose room was fully intentional and a defining characteristic of the school culture. The adjacent ready room has a full kitchen, which accommodates preparation for outdoor activities as well as daily meal requirements.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

• Warranty Work

ADDITIONAL INFORMATION

For questions, comments or additional information, please contact:

Josh Whitaker, Project Manager josh.whitaker@hmkco.org 541.601.3638





PROJECT PHOTO GALLERY

Combined Ashland Middle School and TRAILS Outdoor School Campus







TRAILS Outdoor School







HMK COMPANY



Ashland Middle School







HMK COMPANY



HELMAN ELEMENTARY SCHOOL

PROJECT ADDITION & RENOVATIONS TO EXISTING BUILDING

PROJECT DESCRIPTION

- New secure classroom wing to replace 2 classroom pods, approx. 23,000 sq. ft.
- Campus security
- Includes District Wide HVAC improvements which includes Climate resilience for all buildings, rather than just new construction
- Required tech infrastructure upgrades

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	06/17/19	01/23/20	100%	
Design Development	02/01/20	04/30/20	100%	
Construction Documents	05/14/20	09/24/20	100%	
Bid and Award Site Package	09/04/20	10/16/20	100%	
Bid and Award Building Package	10/15/20	12/15/20	100%	
Construction	10/30/20	08/31/22	100%	
Building Commissioning	06/01/22	03/31/23	100%	
Substantial Completion	08/31/22	03/01/23	100%	
Owner Occupancy	08/23/22	08/24/22	100%	
Post Occupancy Evaluation	03/02/23	08/01/23	100%	
Warranty Period	03/01/23	03/01/24	91%	
Other			0%	

CURRENT ACTIVITIES

With the completion of this project, Helman Elementary School staff, students and community members are now able to fully utilize the renovated campus. The renovations included a brand new approximately 23,000 square foot classroom building to replace two of the existing quad buildings.





The construction of this building has a net reduction in the school's energy use that truly models the Ashland School District's adoption of the City of Ashland's Climate and Energy Action Plan (CEAP). The new classroom building also includes a SPED instructional space with exterior play area, sensory room with state-of-the-art furnishings, a large multipurpose room with an operable exterior wall and multiple breakout spaces scattered throughout the building.

The front administration area underwent a full renovation that included an access-controlled entry. New reception area, conference room and staff work room concluded the new spaces included in the administration area.

Campus wide, a new 4-Pipe hydronic HVAC system that includes new high efficiency boilers, new air handlers and a new chiller was installed. A new building controls system, allowing the district to operate the new systems as efficiently as possible and minimize any maintenance or troubleshooting delays, was also included. The campus also received a new fire alarm system bringing everything up to current building codes.

On the exterior of the site, a new entry drive was installed that will aid with traffic congestion during high traffic periods. Additional parking was installed at the south end of the campus. There is a brand new 1/8th mile walking track and new playground that is accessible to all. New landscaping wraps up the remainder of the campus.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

• N/A

ADDITIONAL INFORMATION

For questions, comments, or additional information, please contact:

Mike Freeman, Project Manager <u>Mike.freeman@hmkco.org</u> 541.499.7996





PROJECT PHOTO GALLERY

Completed Project







ASHLAND HIGH SCHOOL

PROJECT ASHLAND HIGH SCHOOL RENOVATION

PROJECT DESCRIPTION

- Improved accessibility and flexibility for the Humanities and Science Buildings.
- Repurpose or reconfigure exisiting spaces for science program requirements.
- Upgrades for air quality, security, restrooms, and technology infrastructure.

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	01/27/20	10/02/20	100%	
Design Development	10/02/20	01/29/21	100%	
Construction Documents	01/29/21	1/31/24	97%	Revisions to Science Complete
Permits, Bid and Award	05/31/23	3/29/24	75%	Project will have Phased Bid Packages
Construction	06/16/23	12/31/24	35%	HUM Underway SCI Bid Out
Substantial Completion	12/31/24	12/31/24	0%	
Post Occupancy Evaluation	TBD	TBD	0%	
Warranty Period	01/01/25	01/01/26	0%	
Other				

CURRENT ACTIVITIES

The majority of the concrete has been poured back in the Humanities basement and the team is prepping for concrete pour backs at the remainder of the seismic work areas on the ground level and second floor. Much of the rebar structural reinforcements are installed. The mechanical, electrical, fire sprinkler and plumbing is being roughed in on the first two floors of the Humanities building. Work inside of the H-10/H-14 classrooms is awaiting the final approval to proceed now that pricing has been completed and the permit is nearly complete.

The Science Building package was bid out in January with relatively good coverage in most areas by bidders. Abatement and demo were completed previously during the winter break and the construction team will be able to start "Phase 1" work on the Science Building, once the GMP Amendment is approved.

The remaining scope of campus modernization, which includes most of the ancillary buildings is nearly complete and will be put out to bid in February.





ACTIVITIES SCHEDULED FOR NEXT PERIOD

- Commencement of construction in the Science Building.
- The Humanities Building seismic upgrades will continue with emphasis on concrete pour backs.
- Construction Documents for the remainder of the campus work.

ADDITIONAL INFORMATION

For questions, comments, or additional information, please contact:

Josh Whitaker, Project Manager josh.whitaker@hmkco.org 541.601.3638

PROJECT PHOTO GALLERY

Humanities Building Installation of Structural Reinforcement for Seismic Upgrades







ASHLAND SCHOOL DISTRICT CAPITAL PROJECT JANUARY 31, 2024

Humanities Basement Structural Improvements











HMK COMPANY

Page **4** of **4**



WALKER ELEMENTARY SCHOOL

PROJECT ADDITION & RENOVATIONS PROJECT

PROJECT DESCRIPTION

- Comprehensive renovation and seismic improvement of historic Walker Elementary School main building and gymnasium
- Includes replacement of classroom wing, with new classrooms, redesigned entry, new finishes, doors, windows and roof
- Also, includes the district wide HVAC improvements

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	01/07/20	09/22/20	100%	Complete
Design Development	09/22/20	12/10/20	100%	Complete
Construction Documents	12/10/20	08/13/21	100%	Complete
Bid and Award	03/22/21	05/14/21	100%	Complete
Construction Documents Phase 2	10/18/20	11/16/21	100%	Complete
Bid and Award Phase 2	03/22/21	12/14/21	100%	Complete
Construction	07/17/21	04/17/23	100%	Complete
Building Commissioning	01/16/23	04/17/23	100%	Complete
Owner Occupancy	04/17/23	04/18/23	100%	Complete
Post Occupancy Evaluation	04/18/23	07/17/23	100%	Complete
Warranty Period	04/18/23	04/18/24	74%	
Other			0%	

CURRENT ACTIVITIES

The Walker Elementary School renovation is now complete. This project brought much needed improvements to the existing Walker School that will provide the community with a state-of-the-art educational facility for many years to come. The older classroom annex was demolished in order to construct a new classroom wing that also allowed the front entrance to be relocated creating a much more intuitive office space. The historical wing of the building received structural upgrades by way of a state funded seismic grant. The entire classroom building received new finishes, upgraded energy efficient exterior envelope that included new windows and new furniture.

The renovation and addition has a net reduction in the school's energy use that truly models the Ashland School District's adoption of the City of Ashland's Climate and Energy Action Plan (CEAP). The





new addition also includes a SPED instructional space with exterior play area, sensory room with stateof-the-art furnishings, dedicated resource rooms and multiple breakout spaces scattered throughout the building.

Campus wide, a new 4-Pipe hydronic HVAC system that includes new high efficiency boilers, new air handlers and a new chiller was installed. A new building controls system, allowing the district to operate the new systems as efficiently as possible and minimize any maintenance or troubleshooting delays, was also included. The campus also received a new fire alarm system bringing everything up to current building codes.

The gym underwent a seismic upgrade making this building now rated to withstand a seismic event. In addition, it received a new roof and exterior paint as well as HVAC upgrades.

The exterior of the site underwent extensive renovations in order to improve campus security and student and automobile circulation. The parking area was extended, and the traffic flow was reconfigured to create a more cohesive format for pick up and drop off that eases congestion in the neighborhood and adjoining streets. The exterior was fenced creating a secure campus and the newly configured front entrance added access control in order to create a single point of entrance. A new fully accessible playground was installed as well. New landscaping wraps up the exterior improvements.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

• N/A

HIGHLIGHTS, CHALLENGES, SOLUTIONS

HIGHLIGHTS:

• Project completion.

CHALLENGES:

• No current challenges to note.

ADDITIONAL INFORMATION

For questions, comments, or additional information, please contact:

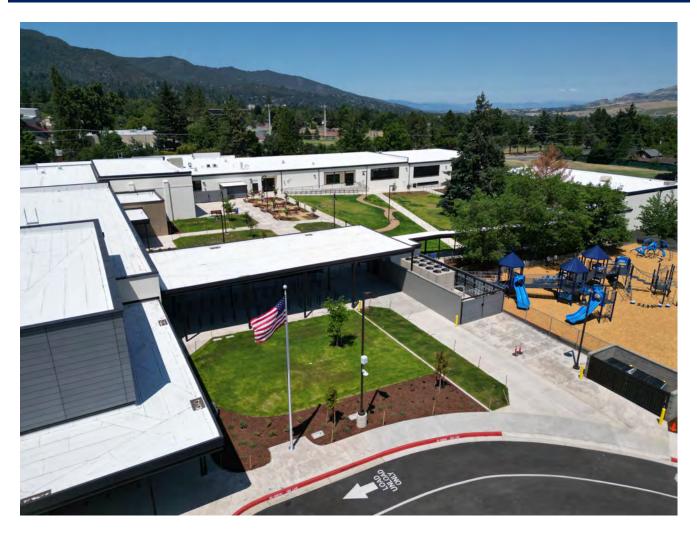
Josh Whitaker, Project Manager josh.whitaker@hmkco.org 541.601.3638





PROJECT PHOTO GALLERY

Aerial Photos of New Renovation and Addition











Placard Depicting the Seismic Upgrade through the Oregon Seismic Rehabilitation Grant







ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION** DISTRICT WIDE ROLLUP BUDGET **DECEMBER 31, 2023**

oject Expense		Original Bu	dget	Pa	aid to Date	Remaining Balance	Re	vised Budget
Hard Cost								
Technology	:	\$ 3,420,	,000	\$	3,244,519	\$ 154,705	\$	3,399,224
Restrooms	:	\$ 3,087,	,500	\$	-	\$ -	\$	-
Security		\$ 2,850,	,000	\$	266,321	\$ 40,621	\$	306,942
HVAC & MEP		\$ 13,569,	,000	\$	-	\$ -	\$	-
Transportation	:	\$	-	\$	559,844	\$ 1	\$	559,845
Bellview	:	\$	-	\$	1,313,435	\$ 383,847	\$	1,697,282
Maintenance	:	\$	-	\$	676,982	\$ 0	\$	676,982
Disctrict Office	:	\$	-	\$	-	\$ -	\$	-
Asbestos Abatement		\$ 316,	·	\$	-	\$ -	\$	-
Construction Contingency	:	\$ 1,348,	,640	\$	-	\$ 300,769	\$	300,769
Construction Sub Total		\$ 24,591,	,587	\$	6,061,100	\$ 879,944	\$	6,941,044
Soft Cost								
Administrative Cost								
Legal Fees	:	\$ 35,	,000	\$	-	\$ -	\$	-
Bond Counsel	:	\$	-	\$	-	\$ -	\$	-
Bond Issuance Cost		\$	-	\$	-	\$ -	\$	-
Builders Risk Insurance	:	\$	-	\$	-	\$ -	\$	-
Project Management	**	\$733,	,063	\$	-	\$ -	\$	-
Reimbursable Expenses	**	\$ 48,	,870	\$	-	\$ -	\$	-
Communications	:	\$	-	\$	-	\$ -	\$	-
Sustainability	:	\$	-	\$	-	\$ -	\$	-
Site Cost								
Site Survey	:	\$ 30,	,000	\$	2,270	\$ 30,000	\$	32,270
Geo-Tech Report	:	\$	-	\$	-	\$ -	\$	-
Planning Cost								
Design Fees		\$ 2,026,	,632	\$	110,448	\$ 171,610	\$	282,058
A & E Reimbursable Expenses			,670	\$	-	\$ 10,000	\$	10,000
Commissioning	:		,267	\$	168,979	\$ (979)	\$	168,000
Printing & Plan Distribution	:		,416	\$	-	\$ -	\$	-
Hazardous Materials Consultant	:		,808,	\$	20,890	\$ 460	\$	21,350
Construction Testing		\$	-	\$	-	\$ -	\$	-
Constructability Review	:		,634	\$	-	\$ -	\$	-
Plan Review & Building Permits	:	\$ 250,	,971	\$	60,724	\$ 46,754	\$	107,478
Special Inspection and Testing	:	\$50,	,053	\$	-	\$ 21,000	\$	21,000
Miscellaneous Fees	:	\$	-	\$	24,549	\$ 7,751	\$	32,300
Ed Specs	:	\$		\$	-	\$ -	\$	-
Kitchen	:	\$	-	\$	-	\$ -	\$	-
Miscellaneous								
Legal Advertisements	:	\$4,	,823	\$	1,217	3,690	\$	4,907
Furniture, Fixtures, and Equipment (FF&E)		\$		\$	7,631	17,369		25,000
Technology		\$	-	\$	37,475	\$ 3,525	\$	41,000
Technology (Design)			,634	\$	1,200	27,477	\$	28,677
Acoustics		. ,	,317	\$	-	\$ -	\$	-
Criminal Background Checks			,162	\$	-	\$ -	\$	-
System Development Charges		\$		\$	-	\$ -	\$	-
Value Engineering			,634	\$	-	\$ -	\$	-
Utility Connection Fee			,214	\$	-	\$ -	\$	-
Unallocated Owner Contingency	:	\$ 2,964,	,431	\$	-	\$ 37,587	\$	37,587
Inflation	:	\$ 1,885,	566	\$	-	\$ 74,433	\$	74,433
Sub Total Soft Cost		\$ 8,876,	,165	\$	435,383	\$ 450,677	\$	886,060

* Budget has been moved to the Project Level **Budget has been moved to the Program Level



ASHLAND SCHOOL DISTRICT CAPITAL CONSTRUCTION PROGRAM LEVEL BUDGET DECEMBER 31, 2023

ogram Revenue ¹	c	Driginal Budget	R	eceived to Date	A	llocated to Date	Unallocated Balance	Revised Budget		
Bond and Other Proceeds										
Bond Proceeds	\$	107,380,000	\$	107,380,000	\$	107,380,000	\$ -	\$	107,380,000	
Bond Premium	\$	22,436,690	\$	22,436,690	\$	17,783,997	\$ 4,652,692	\$	22,436,690	
OSCIM Grant (Ashland Middle School)	\$	1,032,927	\$	4,000,000	\$	4,000,000	\$ -	\$	4,000,000	
Seismic (Walker)	\$	2,500,000	\$	2,497,447	\$	2,497,447	\$ -	\$	2,497,447	
Seismic (Walker-Gymnasium)	\$	-	\$	-	\$	1,834,325	\$ -	\$	1,834,325	
Seismic (Ashland High School)	\$	-	\$	-	\$	2,500,000	\$ -	\$	2,500,000	
Investment Interest	\$	5,000,000	\$	6,211,509	\$	4,628,566	\$ 1,582,943	\$	6,211,509	
	\$	-	\$	-	\$	-	\$ -	\$	-	
Miscellaneous	\$	-	\$	146,252	\$	-	\$ 146,252	\$	146,252	
Total Revenue	\$	138,349,617	\$	142,671,897	\$	140,624,335	\$ 6,381,887	\$	147,006,222	

1. Program Revenue is an estimate. Accuracy should be verified by district personnel

The financial statement presentation has been prepared as a courtesy by HMK. They are based on information derived from ledgers provided by the agency, which have not been independently verified. The financial information included in this presentation is unaudited and should be used for informational purposes only and should not be relied upon for any other use.



ASHLAND SCHOOL DISTRICT CAPITAL CONSTRUCTION PROGRAM BUDGET DECEMBER 31, 2023

ogram Expense	Or	iginal Budget	Paid to Date	Remaining Balance	Re	evised Budge
District Wide Programs	\$	24,591,587	\$ 6,061,100	\$ 879,944	\$	6,941,044
District Wide Solar Projects	\$	-	\$ 856,874	\$ 793,924	\$	1,650,798
Helman Elementary	\$	11,294,084	\$ 15,357,996	\$ (222,925)		15,135,071
Walker Elementary	\$	11,252,185	\$ 29,699,836	\$ 517,701		30,217,537
Ashland Middle School	\$	21,960,270	\$ 35,553,706	\$ (106,330)		35,447,376
Ashland High School	\$	9,124,089	\$ 5,398,686	\$ 16,758,403	\$	22,157,089
Willow Wind Learning Center	\$	-	\$ 1,732,696	\$ 1,732		1,734,428
Construction Sub Total	\$	78,222,215	\$ 94,660,894	\$ 18,622,448	\$	113,283,343
Soft Cost						
Administrative Cost						
Legal Fees	\$	100,000	\$ 24,006	\$ (592)	\$	23,41
Bond Counsel	\$	-	\$ -	\$ -	\$	-
Bond Issuance Cost	\$	625,293	\$ 625,293	\$ 0	\$	625,29
Builders Risk Insurance	\$	-	\$ 80,126	\$ (7,926)	\$	72,20
Project Management	\$	2,274,483	\$ 4,258,966	\$ (250,102)	\$	4,008,864
Reimbursable Expenses	\$	151,631	\$ 328,755	\$ (1,788)		326,96
Communications	\$	-	\$ 199,367	\$ (6,095)		193,27
Sustainability	\$	-	\$ -	\$ -	\$	-
Miscellaneous Fees (Bank, consulting)	\$	-	\$ 360,008	\$ (54,359)		305,64
Ashland SD Staff	\$	-	\$ 943,855	\$ (86,219)		857,63
Lincoln Elementary	\$	-	\$ 42,354	\$ 446	\$	42,80
District Wide Roofing Project	\$	-	\$ 46,200	\$ -	\$	46,20
Site Cost						
Site Survey	\$	213,903	\$ 138,134	\$ 19,589	\$	157,72
Geo-Tech Report	\$	123,179	109,323	\$ 15,411	\$	124,73
Planning Cost						
Design Fees	\$	7,414,694	\$ 7,999,926	\$ 179,874	\$	8,179,80
A & E Reimbursable Expenses	\$	144,431	\$ 35,420	\$ 81,103	\$	116,52
Commissioning	\$	334,589	\$ 378,263	\$ (17,954)	\$	360,30
Printing & Plan Distribution	\$	31,288	\$ 1,724	\$ 55	\$	1,77
Hazardous Materials Consultant	\$	418,761	\$ 476,853	\$ (997)	\$	475,85
Construction Testing	\$	-	\$ -	\$ -	\$	-
Constructability Review	\$	285,616	\$ 573,003	\$ 470	\$	573,47
Plan Review & Building Permits	\$	764,778	\$ 3,114,630	\$ 402,583	\$	3,517,21
Special Inspection and Testing	\$	391,469	\$ 551,072	\$ (10,367)	\$	540,70
Miscellaneous Fees	\$	205,522	\$ 969,477	\$ (127,273)		842,20
Ed Specs	\$	73,532	\$ -	\$ -	\$	-
Kitchen	\$	32,940	\$ -	\$ -	\$	-
Miscellaneous						
Legal Advertisements	\$		\$ 1,217	5,690	\$	6,90
Furniture, Fixtures, and Equipment (FF&E)	\$	2,569,031	\$ 2,615,430	\$ 123,409	\$	2,738,83
Technology	\$	404,005	\$ 460,501	\$ 27,199	\$	487,70
Technology (Design)	\$	467,536	6,605	\$ 63,870	\$	70,47
Acoustics	\$	113,387	-	\$ -	\$	-
Criminal Background Checks	\$	9,862	\$ 10,915	\$ 1,168	\$	12,08
System Development Charges	\$	332,544	\$ 19,662	\$ (570)	\$	19,09
Value Engineering	\$	194,985	\$ -	\$ -	\$	-
Utility Connection Fee	\$	116,214	\$ -	\$ -	\$	-
Unallocated Owner Contingency	\$	9,104,657	\$ -	\$ 38,849	\$	38,84
Inflation	\$	6,111,120	\$ -	\$ 74,433	\$	74,43
Sub Total Soft Cost	\$	33,022,273	\$ 24,371,086	\$ 469,907	\$	24,840,99



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION PROGRAM LEVEL BUDGET DECEMBER 31, 2023**

		Orig	ginal Budget	I	Paid to Date	Remaining	Re	vised Budget
Program Expense						Balance		-
Soft Cost								
Legal Fees		\$	-	\$	24,006	\$ (592)	\$	23,414
Bond Counsel		\$	-	\$	-	\$ -	\$	-
Bond Issuance Cost		\$	625,293	\$	625,293	\$ 0	\$	625,293
Builders Risk Insurance		\$	-	\$	-	\$ -	\$	-
Project Management	12	\$	-	\$	4,122,168	\$ (153,304)	\$	3,968,864
Reimbursable Expenses	11	\$	-	\$	311,211	\$ 356	\$	311,567
Communications	11	\$	-	\$	199,367	\$ (6,095)	\$	193,272
Sustainability		\$	-	\$	-	\$ -	\$	-
Criminal Background Checks	10,11	\$	-	\$	10,915	\$ 1,168	\$	12,083
Printing & Plan Distribution	10	\$	-	\$	779	\$ -	\$	779
Miscellaneous Fees (Bank, consulting)	11	\$	-	\$	360,008	\$ (54,359)	\$	305,649
Ashland SD Staff	11,12	\$	-	\$	943,855	\$ (86,219)	\$	857,636
Lincoln Elementary		\$	-	\$	42,354	\$ 446	\$	42,800
District Wide Roofing Project		\$	-	\$	46,200	\$ -	\$	46,200
Sub Total Soft Cost		\$	625,293	\$	6,686,155	\$ (298,598)	\$	6,387,557

1. Reallocated within budget

2. Reallocated within budget (06.30.21)

3. Reallocated within budget (03.31.22)

4. Reallocated Bond Issuance Costs back to Program Level (06.30.22)

5. Reallocated within budget (06.30.22)

6. Reallocated from investment for add'l staff time (08.31.22)

7. Reallocated from investment income and budget (09.30.22)

8. Reallocated within budget (10.31.22)
 9. Reallocated within budget (12.31.22)

10. Reallocated within budget (01.31.23)

11. Reallocated \$360k from Security (04.30.23)

12. Reallocated within budget (05.31.23)

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ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION DW RESTROOMS BUDGET DECEMBER 31, 2023**

roject Expense		Ori	ginal Budget		Paid to Date		Remaining Balance	Revi	sed Budge
Hard Cost									
Maximum Allowable Construction Cost (MACC)	2	\$	3,087,500	\$	-	\$	-	\$	-
Asbestos		\$	58,705	\$	-	\$	-	\$	-
Seismic Retro Upgrade		\$	-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)		\$	-	\$	-	\$	-	\$	-
Construction Contingency	2	\$	162,500	\$	-	\$	-	\$	-
Construction Sub Total		\$	3,308,705	\$	-	\$	-	\$	-
Soft Cost									
Administrative Cost									
Legal Fees		\$	5,000	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance	3	\$	-	\$	-	\$	-	\$	-
Project Management		\$	99,261	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	6,617	\$	-	\$	-	\$	-
Communications		\$	-	\$	-	\$	-	\$	-
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey		\$	_	\$	_	\$	_	\$	-
Geo-Tech Report		\$	-	\$	-	\$	-	\$	-
Planning Cost									
Design Fees	2	\$	363,958	\$	_	\$	_	\$	-
A & E Reimbursable Expenses	2	\$	6,617	\$	_	\$	_	\$	-
Commissioning	2	\$	-	\$	-	\$	-	\$	_
Printing & Plan Distribution		\$	2,316	\$	_	\$	_	\$	_
Hazardous Materials Consultant	2	\$	66,174	\$	-	\$		\$	_
Construction Testing	2	\$	-	\$	-	\$	-	\$	_
Constructability Review		\$	-	φ \$	-	\$	-	φ \$	-
Plan Review & Building Permits	2		- 39,704		-		-	э \$	-
	2	\$	39,704 -	\$	-	\$	-	¢ ¢	-
Special Inspection and Testing		\$		\$		\$	-	\$	-
Miscellaneous Fees		\$	-	\$	-	\$	-	\$	-
Ed Specs Kitchen		\$ \$	-	\$ \$	-	\$ \$	-	\$ \$	-
Missellanaaua									
Miscellaneous	0	¢	4 000	¢		¢		¢	
Legal Advertisements	2	\$	1,323	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)		\$	-	\$	-	\$	-	\$	-
		\$	-	\$	-	\$	-	\$	-
Technology (Design)		\$	-	\$ ¢	-	\$	-	\$	-
Acoustics		\$	-	Ψ	-	\$	-	\$	-
Criminal Background Checks		\$	662	\$	-	\$	-	\$	-
System Development Charges		\$	-	\$	-	\$	-	\$	-
Value Engineering		\$	-	\$	-	\$	-	\$	-
Utility Connection Fee	-	\$	-	\$	-	\$	-	\$	-
Unallocated Owner Contingency	2	\$	413,588	\$	-	\$	0	\$	
Inflation		\$	258,837	\$	-	\$	-	\$	-
Sub Total Soft Cost		\$	1,264,057	\$	-	\$	0	\$	
Total Project Cost		\$	4,572,762	\$	-	\$	0	\$	

1. Reallocated \$750,000 to AHS (07.31.21) 1. Reallocated \$641,400 to AHS (07.31.21) 1. Reallocated \$1,100,040 to AMS (07.31.21)

2. Reallocated \$ 684,164 to AHS (09.30.21) 3. Reallocated Bond Issuance Costs back to Program Level (06.30.22)



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION** DW SECURITY BUDGET **DECEMBER 31, 2023**

oject Expense	Or	iginal Budget	F	Paid to Date		Remaining Balance	Rev	vised Budget
Hard Cost								
Maximum Allowable Construction Cost (MACC) 10	\$	2,850,000	\$	266,321	\$	40,621	\$	306,942
Asbestos	\$	-	\$	-	\$	-	\$	-
Seismic Retro Upgrade	\$	-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)	\$	-	\$	-	\$	-	\$	-
Construction Contingency	\$	150,000	\$	-	\$	137,207	\$	137,207
Construction Sub Total	\$	3,000,000	\$	266,321	\$	177,828	\$	444,149
Soft Cost								
Administrative Cost								
Legal Fees	\$	5,000	\$	-	\$	-	\$	-
Bond Counsel	\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost	\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance	\$	-	\$	-	\$	-	\$	-
Project Management	\$	90,000	\$	-	\$	-	\$	-
Reimbursable Expenses	\$	6,000	\$	-	\$	-	\$	-
Communications	\$	-	\$	-	\$	-	\$	-
Sustainability	\$	-	\$	-	\$	-	\$	-
Site Cost								
Site Survey	\$	30,000	\$	-	\$	30,000	\$	30,000
Geo-Tech Report	\$	-	\$	-	\$	-	\$	-
Planning Cost								
Design Fees	\$	210,000	\$	-	\$	171,500	\$	171,500
A & E Reimbursable Expenses	\$	6,000	\$	-	\$	-	\$	
Commissioning	\$	0,000	\$	_	\$	-	\$	
Printing & Plan Distribution	\$	2,100	\$	-	φ \$		φ \$	_
Hazardous Materials Consultant	\$	2,100	\$	-	\$	-	φ \$	-
Construction Testing	э \$	-	э \$	-	ф \$	-	э \$	-
		-		-		-		-
Constructability Review	\$	-	\$	-	\$	-	\$	-
Plan Review & Building Permits	\$	30,000	\$	-	\$	18,000	\$	18,000
Special Inspection and Testing	\$	21,000	\$	-	\$	21,000	\$	21,000
Miscellaneous Fees	\$	-	\$	-	\$	-	\$	-
Ed Specs Kitchen	\$ \$	-	\$ \$	-	\$ \$	-	\$ \$	-
	Ŷ		Ŷ		Ŷ		Ŷ	
Miscellaneous	•		~		¢		•	
Legal Advertisements	\$	1,000	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)	\$	-	\$	-	\$	-	\$	-
Technology	\$	-	\$	-	\$	-	\$	-
Technology (Design)	\$	30,000	\$	-	\$	27,000	\$	27,000
Acoustics	\$	-	\$	-	\$	-	\$	-
Criminal Background Checks	\$	500	\$	-	\$	-	\$	-
System Development Charges	\$	-	\$	-	\$	-	\$	-
Value Engineering	\$	-	\$	-	\$	-	\$	-
Utility Connection Fee	\$	-	\$	-	\$	-	\$	-
Unallocated Owner Contingency 6	\$	375,000	\$	-	\$	10,852	\$	10,852
Inflation 7,8,9,		228,396	\$	-	\$	74,433	\$	74,433
Sub Total Soft Cost	\$	1,034,996	\$	-	\$	352,785	\$	352,785

Reallocated \$350,000 to new projects (transportation, bellview, maintenance, and district office)
 Reallocated \$2,000,000 to AHS (09.30.21)
 Reallocated Bond Issuance Costs back to Program Level (06.30.22)
 Reallocated \$50k from Security to Transportation and \$40k to AMS (06.30.22)
 Reallocated \$24k from Security to Maintenace (08.31.22)
 Reallocated \$26k from Security to BES for Sentinel (03.31.23)
 Reallocated \$24k from Security to Maintenance for Ednetics (03.31.23)
 Reallocated \$17k from Security to Transportation for Ednetics(03.31.23)
 Reallocated \$360k from Security to Program Level (04.30.23)



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION DW HVAC & MEP BUDGET DECEMBER 31, 2023**

oject Expense		Or	iginal Budget		Paid to Date		Remaining Balance		Revised Budge
Hard Cost									
Maximum Allowable Construction Cost (MACC)	3	\$	13,569,000	\$	-	\$	-	\$	-
Asbestos		\$	257,742			\$	-	\$	-
Seismic Retro Upgrade		Ŷ	201,112	\$	-	ŝ	-	\$	-
1.5% Solar (Total Project Major Building)				\$	-	\$ \$	_	\$	
				Ψ	_	\$	_	\$	-
Construction Contingency	3	\$	856,140	\$	-	э \$	-	э \$	
	0	Ψ	000,140	Ψ		Ψ		Ψ	
Construction Sub Total		\$	14,682,882	\$	-	\$	-	\$	
Soft Cost									
Administrative Cost									
Legal Fees		\$	20,000	\$	-	\$	-	\$	
Bond Counsel		\$	-	\$	-	\$	-	\$	
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	
Builders Risk Insurance	5	\$	-	\$	-	\$	-	\$	
Project Management	-	\$	435,802	\$	-	\$	-	\$	
Reimbursable Expenses		\$	29,053	\$		\$	-	\$	
Communications		э \$	29,000	э \$	-	э \$	-	э \$	
Sustainability		э \$	-	э \$	-	ъ \$	-	э \$	
		Ψ		Ψ		Ψ		Ψ	
Site Cost		-						-	
Site Survey		\$	-	\$	-	\$	-	\$	
Geo-Tech Report		\$	-	\$	-	\$	-	\$	
Planning Cost									
Design Fees	3	\$	1,452,674	\$	-	\$	-	\$	
A & E Reimbursable Expenses	3	\$	29,053			\$	-	\$	
Commissioning	3	\$	145,267			\$	-	\$	
Printing & Plan Distribution	0	\$	5,000	\$		ŝ	-	\$	
Hazardous Materials Consultant	3	\$	72,634	\$		\$ \$	_	\$	
Construction Testing	3	\$	-	\$	_	\$	-	φ \$	
	0					φ ¢	-	ው ድ	
Constructability Review	3	\$	72,634	\$		\$	-	\$	
Plan Review & Building Permits	3	\$	145,267	\$	-	\$	-	\$	
Special Inspection and Testing	3	\$	29,053	\$		\$	-	\$	
Miscellaneous Fees		\$	-	\$	-	\$	-	\$	
Ed Specs		\$	-	\$	-	\$	-	\$	
Kitchen		\$	-	\$	-	\$	-	\$	
<i>l</i> iscellaneous									
Legal Advertisements		\$	1,500	\$	-	\$	-	\$	
Furniture, Fixtures, and Equipment (FF&E)		\$	-	\$	-	\$	-	\$	
Technology		\$	-	\$	-		-	\$	
Technology (Design)		\$	72,634	\$	-	\$ \$	-	\$	
Acoustics	3	\$	36,317	\$	-	\$	-	\$	
Criminal Background Checks	0	\$	1,000	φ \$	-	\$	-		
System Development Charges		\$	-	\$	-	\$	-	\$ \$	
Value Engineering	2	\$	72,634	\$		\$	-		
	3						-	\$	
Utility Connection Fee	3	\$	116,214			\$	-	\$	
Unallocated Owner Contingency Inflation	4 4	\$ \$	1,815,843 1,144,761	\$ \$		\$ \$	-	\$ \$	
	,							-	
Sub Total Soft Cost		\$	5,697,340	\$	-	\$	-	\$	
Total Project Cost		\$	20,380,222	•		\$		\$	

2. Reallocated \$165,000 to AMS for HVAC upgrade (06.01.21)

3. Reallocated \$1,310,000 to AHS (07.01.21) 3. Reallocated \$7,100,000 to AHS -Phase II (07.01.21)

3. Reallocated \$775,000 to AHS -Phase II (07.01.21) 3. Reallocated \$775,000 to AHS -Phase II (07.01.21) 4. Reallocated \$972,316 to AHS -Phase II (07.01.21)

5. Reallocated Bond Issuance Costs back to Program Level (06.30.22)



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION** DW TECHNOLOGY BUDGET **DECEMBER 31, 2023**

Project Expense		Ori	ginal Budget	F	Paid to Date		Remaining Balance	Re	vised Budget
Hard Cost									
Maximum Allowable Construction Cost (MACC)	8/9	\$	3,420,000	\$	3,244,519	\$	154,705	\$	3,399,224
Asbestos	0/0	\$	-	\$	-	\$	-	\$	-
Seismic Retro Upgrade		\$	-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)		\$	-	\$	-	\$	-	\$	-
		Ψ		Ψ		\$	_	\$	-
Construction Contingency		\$	180,000	\$	-	\$	-	\$	-
Construction Sub Total		\$	3,600,000	\$	3,244,519	\$	154,705	\$	3,399,224
Soft Cost									
Administrative Cost									
		\$	E 000	¢		¢		¢	
Legal Fees			5,000	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$		\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance		\$	-	\$	-	\$	-	\$	-
Project Management		\$	108,000	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	7,200	\$	-	\$	-	\$	-
Communications		\$	-	\$	-	\$	-	\$	-
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey		\$	-	\$	-	\$	-	\$	-
Geo-Tech Report		\$	-	\$	-	\$	-	\$	-
Planning Cost									
Design Fees		\$	-	\$	-	\$	-	\$	-
A & E Reimbursable Expenses		\$	-	\$	-	\$	-	\$	-
Commissioning		\$	_	\$		\$	_	\$	-
Printing & Plan Distribution		\$	_	\$		\$	_	\$	_
Hazardous Materials Consultant		\$	-	\$	-	\$	-	\$	_
		\$	-	э \$	-	э \$	-	ֆ \$	-
Construction Testing			-		-		-		-
Constructability Review		\$	-	\$	-	\$	-	\$	-
Plan Review & Building Permits	9	\$	36,000	\$	-	\$	-	\$	-
Special Inspection and Testing		\$	-	\$	-	\$	-	\$	-
Miscellaneous Fees		\$	-	\$	-	\$	-	\$	-
Ed Specs		\$	-	\$	-	\$	-	\$	-
Kitchen		\$	-	\$	-	\$	-	\$	-
Miscellaneous									
Legal Advertisements	9	\$	1,000	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)		\$	-	\$	-	\$	-	\$	-
Technology		\$	-	\$	-	\$	-	\$	-
Technology (Design)	9	\$	108,000	\$	1,200	\$	477	\$	1,677
Acoustics	-	\$	-	\$		\$	-	\$	
Criminal Background Checks		\$	1,000	\$	-	\$	-	\$	-
System Development Charges		\$	-	\$	-	\$	-	\$	-
Value Engineering		\$	_	\$		\$	_	\$	_
Utility Connection Fee		\$		ф \$	_	ф \$	-	գ Տ	-
•	6	э \$	-	э \$	-	э \$	-	э \$	-
Unallocated Owner Contingency Inflation	υ	ծ \$	360,000 253,572	ծ \$	-	ъ \$	-	ֆ \$	-
Sub Total Soft Cost		\$	879,772	\$	1,200	\$	477	\$	1,677

* Budget has been moved to the Project Level **Budget has been moved to the Program Level *** Re-allocated \$723,216 to Helman (05.31.20) +Budget has been moved to the Program Level (10.31.20) * Re-allocated \$223,636 to Program Level (11.30.20) 1. Reallocated \$362,000 to AHS (09.30.21) 2. Reallocated from Contingency (12.31.21) 3. Reallocated from Contingency (03.31.22) 4. Reallocated from Contingency (05.31.22) 5. Reallocated Bond Issuance Costs back to Program Level

5. Reallocated Bond Issuance Costs back to Program Level (06.30.22) 6. Reallocated costs to MACC (06.30.22)

7. Reallocated from Invest Inc (08.31.22)

Reallocated 300k from Invest Inc (09.30.22)
 Reallocated within Budget (09.30.22)



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION TRANSPORTATION BUDGET DECEMBER 31, 2023**

oject Expense		Origin	al Budget	Pa	aid to Date		Remaining Balance	Rev	ised Budget
Hard Cost									
Maximum Allowable Construction Cost (MACC)	8,10	\$	-	\$	559,844	\$	1	\$	559,845
Asbestos		\$	-	\$	-	\$	-	\$	-
Seismic Retro Upgrade		\$	-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)		\$	-	\$	-	\$	-	\$	-
		\$	-			\$	-	\$	-
Construction Contingency	8,10	\$	-	\$	-	\$	1,652	\$	1,652
Construction Sub Total		\$	-	\$	559,844	\$	1,653	\$	561,497
Soft Cost									
Administrative Cost									
Legal Fees		\$	-	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance		\$	-	\$	-	\$	-	\$	-
Project Management		\$	-	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	-	\$	-	\$	-	\$	-
Communications		\$	-	\$	-	\$	-	\$	-
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey		\$	-	\$	-	\$	-	\$	-
Geo-Tech Report		\$	-	\$	-	\$	-	\$	-
Planning Cost									
Design Fees		\$	-	\$	32,860	\$	-	\$	32,860
A & E Reimbursable Expenses		\$	-	\$	-	\$	-	\$	-
Commissioning		\$	-	\$	19,501	\$	499	\$	20,000
Printing & Plan Distribution		\$	-	\$	-	\$	-	\$	
Hazardous Materials Consultant	10	\$	-	\$	8,850	\$	0	\$	8,850
Construction Testing	10	\$	-	\$	-	\$	-	\$	-
Constructability Review		\$	-	\$	-	\$	-	\$	-
Plan Review & Building Permits		\$	-	\$	17,903	\$	7,152	\$	25,055
Special Inspection and Testing		φ \$		φ \$	-	φ \$	7,152	φ \$	23,033
Miscellaneous Fees	8	φ \$		φ \$	4,388	\$	613	φ \$	5,000
	0		-				013		5,000
Ed Specs Kitchen		\$ \$	-	\$ \$	-	\$ \$	-	\$ \$	-
Nichen		Ψ	-	Ψ	-	ψ	-	φ	-
Miscellaneous		•		•	407	•		•	407
Legal Advertisements		\$	-	\$	407	\$	0	\$	407
Furniture, Fixtures, and Equipment (FF&E)		\$	-	\$	7,631	\$	17,369	\$	25,000
Technology	9	\$	-	\$	16,822	\$	178	\$	17,000
Technology (Design)		\$	-	\$	-	\$	-	\$	-
Acoustics		\$	-	\$	-	\$	-	\$	-
Criminal Background Checks		\$	-	\$	-	\$	-	\$	-
System Development Charges		\$	-	\$	-	\$	-	\$	-
Value Engineering		\$	-	\$	-	\$	-	\$	-
Utility Connection Fee		\$	-	\$	-	\$	-	\$	-
Unallocated Owner Contingency	8	\$	-	\$	-	\$	-	\$	-
Inflation		\$	-	\$	-	\$	-	\$	-
Sub Total Soft Cost		\$	-	\$	108,361	\$	25,812	\$	134,172

Reallocated from DW Security and HVAC (04.18.21)
 Reallocated within Budget(12.31.21)
 Reallocated to Maintenance Bldg (02.28.22)
 Reallocated to Maintenance Bldg (03.31.22)

5. Reallocated within Budget (05.31.22)

6. Reallocated \$50k from Security to Transportation (06.30.22)

7. Reallocated within Budget (08.31.22)

Reallocated within Budget (00.0.122)
 Reallocated from Security (03.31.23)



ASHLAND SCHOOL DISTRICT CAPITAL CONSTRUCTION BELLVIEW BUDGET DECEMBER 31, 2023

roject Expense		Origina	l Budget	F	aid to Date		Remaining Balance	Re	vised Budge
Hard Cost		•		•		•			
Maximum Allowable Construction Cost (MACC)	6	\$	-	\$	352,879	\$	54,763	\$	407,642
Asbestos Seiemie Detro Llegrade		\$	-	\$	-	\$	-	\$	-
Seismic Retro Upgrade		\$	-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)	FC	\$	-	\$	-	\$	-	\$	1 200 640
Phase 2 Construction Contingency	5,6 6	\$ \$	-	\$ \$	960,556 -	\$ \$	329,084 144,186	\$ \$	1,289,640 144,186
Construction Sub Total		\$	-	\$	1,313,435	\$	528,033	\$	1,841,468
Soft Cost									
Administrative Cost									
Legal Fees		\$	-	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance		\$	-	\$	-	\$	-	\$	-
Project Management		\$	-	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	-	\$	-	\$	_	\$	-
Communications		\$ \$	_	\$	-	\$	_	\$	_
Sustainability		φ \$	-	\$	-	φ \$	-	\$	-
Site Cost									
Site Survey	4	\$	-	\$	2,270	\$	-	\$	2,270
Geo-Tech Report		\$	-	\$	-	\$	-	\$	-
Planning Cost									
Design Fees	4,7	\$	-	\$	48,738	\$	(45)	\$	48,69
A & E Reimbursable Expenses		\$	-	\$	-	\$	5,000	\$	5,00
Commissioning	4,7	\$	-	\$	126,976	\$	(3,976)	\$	123,00
Printing & Plan Distribution	7	\$	-	\$	-	\$	-	\$	-
Hazardous Materials Consultant		\$	-	\$	4,540	\$	460	\$	5,00
Construction Testing		\$	-	\$	-	\$	-	\$	-
Constructability Review		\$	-	\$	-	\$	-	\$	-
Plan Review & Building Permits		\$	-	\$	8,508	\$	21,405	\$	29,91
Special Inspection and Testing		\$	-	\$	-	\$	-	\$	-
Miscellaneous Fees		\$	-	\$	13,306	\$	5,694	\$	19,00
Ed Specs		\$	-	\$	-	\$	-	\$	-
Kitchen		\$	-	\$	-	\$	-	\$	-
Miscellaneous									
Legal Advertisements		\$	-	\$	404	\$	2,096	\$	2,50
Furniture, Fixtures, and Equipment (FF&E)		\$	-	\$	-	\$	-	\$	-
Technology		\$	-	\$	-	\$	-	\$	-
Technology (Design)		\$	-	\$	-	\$	-	\$	-
Acoustics		\$	-	\$	-	\$	-	\$	-
Criminal Background Checks		\$	-	\$	-	\$	-	\$	-
System Development Charges		\$	-	\$	-	\$	-	\$	-
Value Engineering		\$	-	\$	-	\$	-	\$	-
Utility Connection Fee		\$	-	\$	-	\$	-	\$	-
Unallocated Owner Contingency	4,7	\$	-	\$	-	\$	-	\$	-
Inflation	·	\$	-	\$	-	\$	-	\$	-
Sub Total Soft Cost		\$	-	\$	204,743	\$	30,633	\$	235,376
Total Project Cost		\$	-	\$	1,518,178	\$	558,666	\$	2,076,844
 Reallocated from DW Security and HVAC (04.18.21) Reallocate within budget (12.31.21) Reallocate within budget (06.30.22) Reallocate within budget (09.30.22) Reallocate from Premium and DW Security (03.31.23) 		135			\$1,512,957.82 \$1,384,163.80 77,351.64 33,229.88	Leo	134,013.85 dgers only dgers only		trict manage



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION** MAINTENANCE BLDG BUDGET **DECEMBER 31, 2023**

Project Expense		Or	iginal Budget	I	Paid to Date		Remaining Balance	Rev	ised Budget	
Hard Cost										
Maximum Allowable Construction Cost (MACC)		\$	-	\$	653,092	\$	0	\$	653,092	
Security Fencing	7,10	\$	-	\$	23,890	\$	-	\$	23,890	
Seismic Retro Upgrade		\$	-	\$	-	\$	-	\$	-	
1.5% Solar (Total Project Major Building)		\$	-	\$	-	\$	-	\$	-	
		\$	-			\$	-	\$	-	
Construction Contingency	10	\$	-	\$	-	\$	17,724	\$	17,724	
Construction Sub Total		\$	-	\$	676,982	\$	17,724	\$	694,706	
Soft Cost										
Administrative Cost										
Legal Fees		\$	-	\$	-	\$	-	\$	-	
Bond Counsel		\$	-	\$	-	\$	-	\$	-	
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-	
Builders Risk Insurance		\$	-	\$	-	\$	-	\$	-	
Project Management		\$	-	\$	-	\$	-	\$	-	
Reimbursable Expenses		\$	-	\$	-	\$	-	\$	-	
Communications		\$	-	\$	-	\$	-	\$	-	
Sustainability		\$	-	\$	-	\$	-	\$	-	
Site Cost										
Site Survey		\$	-	\$	-	\$	-	\$	-	
Geo-Tech Report		\$	-	\$	-	\$	-	\$	-	
Planning Cost										
Design Fees	6	\$	-	\$	28,850	\$	155	\$	29,005	
A & E Reimbursable Expenses		\$	-	\$	-	\$	5,000	\$	5,000	
Commissioning		\$	-	\$	22,501	\$	2,499	\$	25,000	
Printing & Plan Distribution		\$	-	\$,	\$	_,	\$		
Hazardous Materials Consultant		\$	-	\$	7,500	\$	-	\$	7,500	
Construction Testing		\$	-	\$	-	\$	-	\$	-	
Constructability Review		\$		\$	-	\$	-	\$	_	
Plan Review & Building Permits	8	\$		\$	34,313	\$	197	\$	34,510	
Special Inspection and Testing	0	\$	-	\$	- 54,515	φ \$	-	φ \$	54,510	
Miscellaneous Fees	6	\$	-	\$	6,855	\$	- 1,445	\$	8,300	
	0		-		0,000		1,445		6,300	
Ed Specs Kitchen		\$ \$	-	\$ \$	-	\$ \$	-	\$ \$	-	
Miscellaneous										
Legal Advertisements		\$		\$	407	\$	1,593	\$	2,000	
Furniture, Fixtures, and Equipment (FF&E)		\$	_	\$	407	\$	-	\$	2,000	
	8,9		-	¢ ¢	-				-	
Technology Technology (Design)	0,9	\$	-	\$	20,653	\$	3,347	\$	24,000	
		\$ \$	-	\$	-	\$	-	\$	-	
Acoustics			-	\$	-	\$	-	\$	-	
Criminal Background Checks		\$	-	\$	-	\$	-	\$	-	
System Development Charges		¢ ¢	-	\$ ¢	-	\$ ¢	-	\$ ¢	-	
Value Engineering		\$	-	\$	-	\$	-	\$	-	
Utility Connection Fee	~	\$	-	\$	-	\$	-	\$	-	
Unallocated Owner Contingency Inflation	6	\$ \$	-	\$ \$	-	\$ \$	26,735	\$ \$	26,735 -	
Sub Total Soft Cost		\$	_	\$	121,080	\$	40,970	\$	162,050	
					-		-			
Total Project Cost		\$	-	\$	798,061	\$	58,695	\$	856,756	

1. Reallocated from DW Security and HVAC (04.18.21) 2. Reallocated from Transportation (02.28.22) 3. Reallocated within Budget (02.28.22)

4. Reallocated within Budget (03.31.22)

5. Reallocated within Budget (05.31.22)

6. Reallocated within Budget (06.30.22)

7. Reallocated from Safety and Security (08.31.22)

8. Reallocate from investment income (09.30.22)

9. Reallocate 24k from Security (01.31.23)

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ASHLAND SCHOOL DISTRICT CAPITAL CONSTRUCTION HELMAN ELEMENTARY SCHOOL BUDGET DECEMBER 31, 2023

roject Expense		Or	iginal Budget	I	Paid to Date		Remaining Balance	Re	evised Budget
Hard Cost Maximum Allowable Construction Cost (MACC) Asbestos	13	\$ \$	10,576,000 189,259	\$	15,357,996	\$ \$	(222,925) -	\$ \$	15,135,071 -
Seismic Retro Upgrade 1.5% Solar (Total Project Major Building)						\$ \$	-	\$	-
Construction Contingency	13	\$	528,825	\$	-	\$	-	\$	-
Construction Sub Total		\$	11,294,084	\$	15,357,996	\$	(222,925)	\$	15,135,071
Soft Cost									
Administrative Cost									
Legal Fees		\$	15,000	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance		\$	-	\$	10,869	\$	131	\$	11,000
Project Management		\$	338,823	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	22,588	\$	_	\$	_	\$	_
Communications		\$	22,500	\$		\$		\$	_
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey		\$	22,588	\$	16,151	\$	-	\$	16,151
Geo-Tech Report		\$	33,882	\$	22,170	\$	30	\$	22,200
Planning Cost									
Design Fees	13	\$	1,129,408	\$	1,213,367	\$	0	\$	1,213,367
A & E Reimbursable Expenses		\$	22,588	\$	271	\$	0	\$	271
Commissioning		\$	56,470	\$	42,420	\$	1,000	\$	43,420
Printing & Plan Distribution		\$	2,500	\$	-	\$	-	\$	-
Hazardous Materials Consultant	13	\$	56,470	\$	79,820	\$	13,200	\$	93,020
Constructability Review		\$	56,470	\$	75,000	\$	470	\$	75,470
Plan Review & Building Permits		\$	112,941	\$	640,326	\$	8,448	\$	648,774
Special Inspection and Testing		\$	79,059	\$	144,118	\$	38,102	\$	182,220
Miscellaneous Fees	13,14		45,176	\$	96,711	\$	4,723	\$	101,434
Ed Specs	10,14	\$	22,588	\$	50,711	\$	4,725	\$	
Kitchen		\$	-	\$	-	\$	-	\$	-
Miscellaneous									
Legal Advertisements		\$	2,000	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)		\$	564,704	\$	586,301	\$	(3,362)	\$	582,939
Technology		\$	112,941	\$	-	\$	-	\$	
Technology (Design)		\$	56,470	\$	5,404	\$	96	\$	5,500
Acoustics		\$	16,941	\$		\$	-	\$	-
Criminal Background Checks		\$	2,000	\$	-	\$	-	\$	-
System Development Charges	13,14		112,941	\$	-	\$	_	φ \$	_
Value Engineering	13,14	ֆ \$	56,470	գ \$	-	ֆ \$	-	ֆ \$	-
Utility Connection Fee		\$		φ \$	_	φ \$	_	\$	_
Unallocated Owner Contingency		ֆ \$	- 1,129,408	գ \$	-	ֆ \$	-	ֆ \$	-
Inflation		ф \$	921,871	э \$	-	э \$	-	э \$	-
Sub Total Soft Cost		\$	4,992,297	\$	2,932,928	\$	62,838	\$	2,995,766
Total Project Cost		\$	16,286,381	\$	18,290,924	\$	(160,087)	*	18,130,837

12. ReAllocated within Budget (09.30.22)

13. ReAllocated within Budget (01.31.23)

14. Costs were recategorized (04.30.23)



ASHLAND SCHOOL DISTRICT CAPITAL CONSTRUCTION ASHLAND MIDDLE SCHOOL BUDGET DECEMBER 31, 2023

roject Expense		Or	iginal Budget	I	Paid to Date		Remaining Balance	Re	vised Budge
Hard Cost		•	00 500 005	¢	AF FFA	¢	(400.00	¢	05 4/5 055
Maximum Allowable Construction Cost (MACC)	18	\$	20,500,000	\$	35,553,706	\$	(106,331)		35,447,376
Asbestos Sciencia Datro Lla grada		\$	384,870	\$	-	\$	-	\$	-
Seismic Retro Upgrade		\$	-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)		\$	-	\$	-	\$	-	\$ \$	-
Construction Contingency		\$	1,075,400	\$	-	\$	0	\$	0
Construction Sub Total		\$	21,960,270	\$	35,553,706	\$	(106,330)	\$	35,447,376
Soft Cost									
Administrative Cost									
Legal Fees		\$	20,000	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance		\$	-	\$	-	\$	-	\$	-
Project Management		\$	658,808	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	43,921	\$	-	\$	-	\$	-
Communications		\$	-	\$	-	\$	-	\$	-
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey	17	\$	43,921	\$	24,226	\$	690	\$	24,916
Geo-Tech Report		\$	43,921	\$	37,264	\$	2,736	\$	40,000
Planning Cost									
Design Fees		\$	2,196,027	\$	2,350,794	\$	91,896	\$	2,442,690
A & E Reimbursable Expenses		\$	43,921	\$	34,400	\$	35,600	\$	70,000
Commissioning		\$	87,841	\$	53,220	\$	-	\$	53,220
Printing & Plan Distribution		\$	15,372	\$	-	\$	-	\$	-
Hazardous Materials Consultant		\$	87,841	\$	149,293	\$	2,057	\$	151,350
Construction Testing		\$	-	\$	-	\$	-	\$	-
Constructability Review		\$	65,881	\$	88,403	\$	-	\$	88,403
Plan Review & Building Permits		\$	219,603	\$	1,127,525	\$	186	\$	1,127,711
Special Inspection and Testing		\$	153,722	\$	115,193	\$	3,749	\$	118,942
Miscellaneous Fees	17	\$	87,841	\$	293,568	\$	(14,318)		279,250
Ed Specs		\$	32,940	\$	-	\$	-	\$	-
Kitchen		\$	32,940	\$	-	\$	-	\$	-
Miscellaneous									
Legal Advertisements		\$	2,000	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)		\$	1,098,014	\$	1,136,861	\$	13,139	\$	1,150,000
Technology	16	\$	109,801	\$	53,533	\$	19,252	\$	72,78
Technology (Design)		\$	109,801	\$	<i>_</i>	\$	-	\$	-
Acoustics		Ŝ	32,940	Ŝ	-	Ŝ	-	Ŝ	-
Criminal Background Checks		\$	2,000	\$	-	\$	-	\$	-
System Development Charges		\$	219,603		4,320	\$	(570)		3,750
Value Engineering		\$	65,881	\$	-	\$	-	\$	-
Utility Connection Fee		\$	-	\$	-	\$	-	\$	-
Unallocated Owner Contingency		\$	2,745,034	\$	-	\$	-	\$	-
Inflation		\$	1,810,791	\$	-	\$	-	\$	-
Sub Total Soft Cost		\$	10,030,365	\$	5,468,599	\$	154,418	\$	5,623,017
Total Project Cost		\$	31,990,635	\$	41,022,306	\$	48,087	\$	41,070,393

15. Reallocated within Budget (01.31.23)

16. Reallocated \$26k from Security (03.31.23)

17. Reallocated within Budget (05.31.23)

18. Reallocated from Investment Inc (06.30.23)



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION** ASHLAND HIGH SCHOOL BUDGET **DECEMBER 31, 2023**

roject Expense		Or	iginal Budget	I	Paid to Date		Remaining Balance	Re	evised Budget
Hard Cost		•		•		•		•	
Phase II: HVAC		\$	-	\$	3,023,388	\$	4,076,612	\$	7,100,000
Maximum Allowable Construction Cost (MACC)		\$	8,544,000	\$	2,375,298	\$	11,466,702	\$	13,842,000
Asbestos	40	\$	152,889	\$	-	\$	152,889	\$	152,889
Seismic Retro Upgrade	13	\$	-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)		\$	-	\$	-	\$	-	\$	-
Construction Contingency	13	\$	427,200	\$	-	\$	1,062,200	\$	1,062,200
Construction Sub Total		\$	9,124,089	\$	5,398,686	\$	16,758,403	\$	22,157,089
Soft Cost									
Administrative Cost									
Legal Fees		\$	15,000	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance		\$	-	\$	-	\$	-	\$	-
Project Management	18	\$	273,723	\$	136,799	\$	(96,799)	\$	40,000
Reimbursable Expenses	17	\$	18,248	\$	17,545	\$	(2,145)	\$	15,400
Communications		\$	-	\$	-	\$	(2,110)	\$	-
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey		\$	27,372	\$	50,572	\$	-	\$	50,572
Geo-Tech Report		\$	27,372		36,465	\$	(393)		36,072
Planning Cost									
Design Fees	19	\$	912,409	\$	2,143,809	\$	(67,277)	\$	2,076,532
A & E Reimbursable Expenses	10	\$	18,248	\$	334	\$	17,914	\$	18,248
Commissioning		\$	-	\$	-	\$	-	\$	-
					-	φ \$	-	φ \$	-
Printing & Plan Distribution		\$	2,000	\$	-	•	-		-
Hazardous Materials Consultant		\$	45,620	\$	68,871	\$	(21,251)		47,620
Construction Testing		\$	-	\$		\$	-	\$	
Constructability Review		\$	45,620	\$	334,600	\$	0	\$	334,600
Plan Review & Building Permits		\$	91,241	\$	312,822	\$	330,148	\$	642,970
Special Inspection and Testing		\$	45,620	\$	148,119	\$	(46,499)	\$	101,620
Miscellaneous Fees	19	\$	36,496	\$	88,541	\$	(3,737)	\$	84,804
Ed Specs		\$	-	\$	-	\$	-	\$	-
Kitchen		\$	-	\$	-	\$	-	\$	-
Miscellaneous									
Legal Advertisements		\$	2,000	\$	-	\$	2,000	\$	2,000
Furniture, Fixtures, and Equipment (FF&E)		\$	456,204	\$	9,200	\$	90,800	\$	100,000
Technology		\$	91,241	\$	131,075	\$	219	\$	131,294
Technology (Design)		\$	45,620	\$	-	\$	36,298	\$	36,298
Acoustics		\$	13,686	\$	-	\$	-	\$	-
Criminal Background Checks		\$	1,500	\$	-	\$	-	\$	-
System Development Charges		\$	-	\$	-	\$	-	\$	-
Value Engineering		\$	_	\$	-	\$	-	\$	-
Utility Connection Fee		\$	-	э \$	-	э \$	-	э \$	-
Unallocated Owner Contingency	17,18	э \$	- 1,140,511	ъ \$	-	э \$	- 1,262	ъ \$	- 1,262
Inflation	19	\$	746,029	э \$	-	ֆ \$	-	э \$	-
Sub Total Soft Cost		\$	4,055,760	\$	3,478,751	\$	240,542	\$	3,719,292
								÷	
Total Project Cost		\$	13,179,849	\$	8,877,436	\$	16,998,945	\$	25,876,381

Reallocated within Budget (10.31.22)
 Reallocated within Budget (01.31.23)
 Reallocated within Budget (02.28.23)
 Reallocated within Budget (03.31.23)
 Reallocated within Budget (06.30.23)



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION** WALKER ELEMENTARY SCHOOL BUDGET **DECEMBER 31, 2023**

roject Expense		Or	iginal Budget	I	Paid to Date	R	emaining Balance	Re	vised Budget
Hard Cost									
Maximum Allowable Construction Cost (MACC)	15	\$	8,533,000	\$	26,401,046	\$	625,645	\$	27,026,691
Asbestos		\$	42,535	\$	-	\$	-		
Seismic Retro Upgrade		\$	2,250,000	\$	1,533,462	\$	79,959	\$	1,613,421
Science Works		\$	-	\$	88,667	\$	333	\$	89,000
Modular Rental		•		\$	1,676,661	\$	(188,236)		1,488,425
Construction Contingency	15	\$	426,650	\$	-	\$	(0)		(0)
Construction Sub Total		\$	11,252,185	\$	29,699,836	\$	517,701	\$	30,217,537
Soft Cost									
Administrative Cost									
Legal Fees		\$	15,000	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance	14	\$	-	\$	69,257	\$	(8,057)	\$	61,200
Project Management		\$	270,066	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	18,004	\$	-	\$	-	\$	-
Communications		\$	-	\$	-	\$	-	\$	-
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey		\$	90,022	\$	28,177	\$	1,637	\$	29,814
Geo-Tech Report		\$	18,004	\$	26,462	\$	(0)		26,462
Planning Cost									
Design Fees	14	\$	1,150,218	\$	1,986,657	\$	(19,165)	\$	1,967,492
A & E Reimbursable Expenses		\$	18,004	\$	415	\$	17,589	\$	18,004
Commissioning		\$	45,011	\$	92,144	\$	(18,259)		73,885
Printing & Plan Distribution		\$	2,000	\$	945	\$	(10,200)	\$	1,000
Hazardous Materials Consultant		\$	90,022	\$	147,085	\$	4,537	\$	151,622
Construction Testing		φ \$	90,022	φ \$	147,005	φ \$	4,557	ф \$	131,022
Constructability Review		φ \$	45,011	φ \$	- 75,000	φ \$		ф \$	75,000
Plan Review & Building Permits		φ \$	90,022	φ \$	892,242		4,718	φ \$	
	1.4	ъ \$,		,	\$,	•	896,960
Special Inspection and Testing	14		63,015	\$	139,809	\$	(26,719)		113,090
Miscellaneous Fees	16,17		36,009	\$	411,836	\$	(125,686)		286,150
Ed Specs Kitchen		\$ \$	18,004 -	\$ \$	-	\$ \$	-	\$ \$	-
Miscellaneous									
Legal Advertisements		\$	2.000	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)	14	Ψ \$	450,109	φ \$	866,902	\$	4.998	\$	871,900
Technology	14	ъ \$	450,109 90,022	ъ \$	238,419	ъ \$	4,998	э \$	242,621
Technology (Design)	14	э \$	90,022 45,011	ф \$	230,419	ф \$	4,202	э \$	242,021
Acoustics		э \$	13,503	ф \$	-	э \$	-	э \$	_
				ъ \$	-		-	ъ \$	-
Criminal Background Checks	16	\$ \$	1,200	ֆ Տ	-	\$ \$	-	ծ Տ	-
System Development Charges	10	Ψ	-	ъ \$	-	Ψ	-	Ψ	-
Value Engineering		\$ ¢	-		-	\$ ¢	-	\$ ¢	-
Utility Connection Fee Unallocated Owner Contingency		\$	-	\$	-	\$	-	¢	-
Inflation		\$ \$	1,125,273 746,863	\$ \$	-	\$ \$	(0)	\$ \$	- (0)
Sub Total Soft Cost		\$	4,442,393	\$	4,975,350	\$	(160,150)	\$	4,815,200
Total Project Cost		\$	15,694,578		34,675,186		357,551		35,032,737
		φ	13,034,370	φ	34,073,100	φ	307,001	φ	33,032,131

Reallocated Bond Issuance Costs back to Program Level (06.30.22)
 Reallocated within Budget (06.30.22)
 Reallocated within Budget (08.31.22)
 Increase budget with Investment Income (08.31.22)
 Increase budget with Investment Income (03.31.23)
 Reallocated within Budget (03.31.23)
 Costs were recategorized (04.30.23)
 Reallocated within Budget (04.30.23)



ASHLAND SCHOOL DISTRICT **CAPITAL CONSTRUCTION** WILLOW WIND LEARNING CENTER **DECEMBER 31, 2023**

Hard Cost 4,8 Maximum Allowable Construction Cost (MACC) 4,8 Other Contractor Costs Construction Sub Total Soft Cost Construction Sub Total Soft Cost Mainistrative Cost Legal Fees Bond Counsel Bond Counsel Bond Suance Cost Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Survey Geo-Tech Report Design Fees Patienting Cost Design Fees Design Fees 5 A & E Reimbursable Expenses 5 Construction Testing Construction Testing Construction Testing Construction Testing Construction Testing Geo-Tech Report Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, a	\$\$\$\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	· · · · · · · ·	\$\$\$\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	1,732,696 - - - - - 1,732,696 - - - - - - - - - - - - - - - - - - -	\$\$\$\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	1,732 - - - 1,732 - - - - - - - - - - - - - - - - - - -	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	1,734,428 - - - - 1,734,428 - - - - - - - - - - - - - - - - - - -
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Construction Sub Total Soft Cost Administrative Cost Legal Fees Bond Counsel Bond Issuance Cost Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	1,732,696 - - - - - - - - - - - - -	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	1,732 - - - - - - -	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	- 1,734,428 - - - - - - - - - - - - - - - - - - -
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Soft Cost Legal Fees Bond Counsel Bond Issuance Cost Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees Commissioning Printing & Plan Distribution Hazardous Materials Consultant Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$		****	- - - -	\$ \$ \$ \$ \$ \$ \$ \$ \$	1,734,428 - - - - - - - - - - - - - - - -
Administrative Cost Legal Fees Bond Counsel Bond Issuance Cost Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	***		\$ \$ \$ \$ \$ \$ \$	- - - - - - - -
Legal Fees Bond Counsel Bond Issuance Cost Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	***		\$ \$ \$ \$ \$ \$ \$	- - - - - -
Bond Counsel Bond Issuance Cost Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	***		\$ \$ \$ \$ \$ \$ \$	
Bond Issuance Cost Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$		\$ \$ \$ \$ \$	
Builders Risk Insurance Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$		\$ \$ \$ \$ \$ \$	
Project Management Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$		\$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$ \$ \$ \$		\$ \$ \$ \$	- - - - -
Reimbursable Expenses Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Construction Testing Construction Testing Construction and Testing Miscellaneous Fees Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$		\$ \$ \$ \$	-	\$\$\$ \$ \$ \$		\$ \$ \$	-
Communications Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	- - -	\$ \$ \$ \$	-	\$ \$ \$		\$ \$ \$	- - -
Sustainability Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$ \$ \$ \$ \$	-	\$ \$ \$	- - - 128,412	\$ \$	- - -	\$ \$	-
Site Cost Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$ \$	-	\$ \$ \$	- - 128,412	\$ \$	-	\$	-
Site Survey Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$		\$ \$	- - 128,412	\$:		-
Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$	-	\$ \$	- - 128,412	\$	-		-
Geo-Tech Report Planning Cost Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$ \$	-	\$ \$	- 128,412	\$	-		-
Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks Entertage	\$	-		128,412	\$			
Design Fees 5 A & E Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks Entertage	\$	-		128,412	\$			
A & Ē Reimbursable Expenses Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$	-				(351)	\$	128,061
Commissioning Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks			Ψ	-	\$	-	\$	-
Printing & Plan Distribution Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks		-	\$	21,500	\$	284	\$	21,784
Hazardous Materials Consultant Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$	-	\$	21,000	\$	-	\$	- 21,704
Construction Testing Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$	-	\$	10,894	\$	-	\$	10,894
Constructability Review Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$	-	\$	-	\$ \$	-	\$	10,034
Plan Review & Building Permits Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	φ \$	-	\$	-	φ \$	-	φ \$	_
Special Inspection and Testing Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	э \$	-	э \$		э \$			25 220
Miscellaneous Fees 6,7 Ed Specs Kitchen Miscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	ծ Տ		ъ \$	37,164		,		35,320
Ed Specs Kitchen fiscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	+	-		3,833	\$	0	\$	3,833
Kitchen fiscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$	-	\$	54,272	\$	3,994	\$	58,266
fliscellaneous Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	\$ \$	-	\$ \$	-	\$ \$	-	\$ \$	-
Legal Advertisements Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	Ŧ		Ŧ		Ŧ		Ŧ	
Furniture, Fixtures, and Equipment (FF&E) Technology Technology (Design) Acoustics Criminal Background Checks	•		¢		•		~	
Technology Technology (Design) Acoustics Criminal Background Checks	\$	-	\$	-	\$	-	\$	-
Technology (Design) Acoustics Criminal Background Checks	\$	-	\$	8,535	\$	465	\$	9,000
Acoustics Criminal Background Checks	\$	-	\$	-	\$	-	\$	-
Criminal Background Checks	\$	-	\$	-	\$	-	\$	-
	÷	-	\$	-	\$	-	\$	-
System Dovelopment Charges	\$	-	\$	-	\$	-	\$	-
	\$	-	\$	15,342	\$	-	\$	15,342
Value Engineering	\$ \$		\$	-	\$	-	\$	-
Utility Connection Fee	\$ \$ \$	-	\$	-	\$	-	\$	-
Unallocated Owner Contingency 5	\$ \$ \$ \$	-			\$		\$	-
Inflation	\$ \$ \$ \$ \$	- - -	\$	-		-	\$	_
Sub Total Soft Cost	\$ \$ \$ \$			-	\$ \$	-	Ψ	-
Total Project Cost	\$ \$ \$ \$ \$		\$	- - 279,952		- - 2,548	\$	- 282,500

2. ReAllocated costs within budget (08.01.21)

ReAllocated costs within budget (00.01.21)
 ReAllocated costs within budget (08.01.21)
 \$79,500 moved to WES (12.31.21)

4. ReAllocated costs within budget (03.31.22)
 5. ReAllocated costs within budget (08.31.22)
 6. ReAllocated costs from Investment Inc (09.30.22)
 7. ReAllocated costs from Investment Inc (05.31.23)



ASHLAND SCHOOL DISTRICT CAPITAL CONSTRUCTION DISTRICT WIDE SOLAR PROJECT DECEMBER 31, 2023

Project Expense		Or	iginal Budget	I	Paid to Date		Remaining Balance	Re	vised Budget
Hard Cost									
1.5% Solar (Walker Elementary)		\$	-	\$	282,398	\$	0	\$	282,398
1.5% Solar (Helman Elementary)		\$	-	\$	250,000	\$	-	\$	250,000
1.5% Solar (Ashland Middle School)	2,3,4	\$	-	\$	324,476	\$	93,924	\$	418,400
1.5% Solar (Ashland High School)		\$	-			\$	200,000	\$	200,000
1.5% Solar (Willow Wind Learning Center)		\$	-	\$	-	\$	-	\$	-
Construction Contingency	1,5	\$	-	\$	-	\$	500,000	\$	500,000
Construction Sub Total		\$	-	\$	856,874	\$	793,924	\$	1,650,798
Soft Cost									
Administrative Cost									
Legal Fees		\$	-	\$	-	\$	-	\$	-
Bond Counsel		\$	-	\$	-	\$	-	\$	-
Bond Issuance Cost		\$	-	\$	-	\$	-	\$	-
Builders Risk Insurance		\$	-	\$	-	\$	-	\$	-
Project Management		\$	-	\$	-	\$	-	\$	-
Reimbursable Expenses		\$	-	\$	-	\$	-	\$	-
Communications		\$	-	\$	-	\$	-	\$	-
Sustainability		\$	-	\$	-	\$	-	\$	-
Site Cost									
Site Survey	3	\$	-	\$	3,700	\$	300	\$	4,000
Geo-Tech Report		\$	-	\$	-	\$	-	\$	-
Planning Cost									
Design Fees	2,3,4	\$	-	\$	66,440	\$	3,160	\$	69,600
A & E Reimbursable Expenses	_,_, .	\$	-	\$	-	\$	-	\$	-
Commissioning		\$	-	\$	-	\$	-	\$	-
Printing & Plan Distribution		\$	-	\$	-	\$	-	\$	-
Hazardous Materials Consultant		\$	-	\$	-	\$	-	\$	-
Construction Testing		\$	-	\$	-	\$	-	\$	-
Constructability Review		ŝ	-	\$	_	\$	_	\$	_
Plan Review & Building Permits	3,4,5	\$	-	\$	43,827	\$	14,173	\$	58,000
Special Inspection and Testing	5,4,5	\$	-	\$		\$	-	\$	
Miscellaneous Fees		\$	_	\$	_	\$	_	\$	
Ed Specs		φ \$	-	φ \$	-	\$	-	\$	-
Kitchen		э \$	-	ֆ \$	-	\$	-	Գ \$	-
Miscellaneous									
Legal Advertisements		\$	-	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)		\$	-	\$	_	\$	_	\$	_
Technology		\$	_	\$	-	\$	-	\$	-
Technology (Design)		գ Տ	-	գ \$	-	ֆ \$	-	э \$	-
Acoustics		ф \$	-	ъ \$	-	э \$	-	ъ \$	-
Criminal Background Checks		գ \$	-	ֆ \$	-	э \$	-	э \$	-
System Development Charges		φ ¢	-	ъ \$	-	ъ \$	-	ъ \$	-
Value Engineering		φ Φ	-	ъ \$	-	ъ \$	-	ъ \$	-
Utility Connection Fee		э \$	-	э \$	-	э \$	-		-
			-		-		-	\$ ¢	-
Unallocated Owner Contingency Inflation		\$ \$	-	\$ \$	-	\$ \$	-	\$ \$	-
Sub Total Soft Cost		\$	-	\$	113,967	\$	17,633	\$	131,600
					970,841				
Total Project Cost		\$	-	\$	970,841	¢	811,557	φ	1,782,398

1. ReAllocated from Investment Inc (09.30.22)

2. ReAllocated within Budget (09.30.22)

3. ReAllocated within Budget (04.30.23)

4. ReAllocated within Budget (06.30.23)



February 8, 2024

Steve Mitzel, Program Executive Ashland School District 885 Siskiyou Boulevard Ashland, Oregon 97520

RE: Ashland School District Construction Manager | General Contractor (CM|GC) GMP - Amendment 5 Ashland High School Science and Humanities Modernization Project

Dear Steve,

After careful review and consideration, HMK Company recommends that the Ashland School District Board award Guaranteed Maximum Price (GMP) Amendment 5 for the Science Bid Package to KNCC + Outlier, LLC (KNO) in the amount of \$7,189,225.09.

The original Contract amount of \$184,760.00, previous GMP Amendments and Change Orders totaling \$12,019,164.40, and this GMP Amendment 5 for above increase in scope for \$7,189,225.09 will bring the total Not to Exceed sum to \$19,393,149.49.

We are asking that the District Board take action to award the CM|GC GMP Amendment 5 for Ashland High School Science and Humanities Modernization Project to KNCC + Outlier, LLC (KNO) for the additional Not to Exceed sum of \$7,189,225.09 for a Total Not to Exceed Contract sum of \$19,393,149.49.

If you have any questions, please do not hesitate to contact me to discuss.

Sincerely,

Mike Freeman

Mike Freeman Program Manager HMK Company

Att: GMP 5 Contract Documents



January 31st , 2024

Mike Freeman Regional Director HMK Company

RE: Ashland High School GMP Amendment 05

Dear Mike,

Please see enclosed documents related to the requested GMP Amendment 05 for the Ashland High School Science & Humanities Modernization Project.

Enclosed:

GMP Amendment 05 Pricing Summary (dated 1/31/2024)

GMP Amendment 05 Assumptions, Clarifications, and Exclusions (dated 1/31/2024)

We're looking forward to working alongside HMK, Ashland School District, and Arkitek to deliver another phase of this successful project. Please let us know if you have any questions or require any additional information.

Mike Taylor Project Executive KNCC + Outlier, LLC



AHS GMP Amendment 05 - Science Pricing Summary 1.31.24



Bid	ltem	Description	Bid 1.11.2024
Scien	nce - Bid Pa	ckage 03	
		R General Requirements	206,977.00
		1 Final Cleaning - By Owner	0.00
		2 Abatement	75,426.00
	2.	2 Select Demo	208,296.44
	2.	5 Trenching, Backfill, and Site Improvements	89,265.94
		3 Concrete	84,900.00
		4 Masonry	39,116.00
		5 Structural and Architectural Steel	135,421.00
		6 Structural and non Structural Wood Framing	114,370.00
	6.	2 Laboratory Casework & Running Trim	915,349.00
		1 Firestopping	25,000.00
	7.	3 Joint Sealants	8,500.00
	7.	5 Flashings	1,037.00
		6 Roof Patching	30,490.00
		8 Doors & Hardware - Supply	198,266.00
		2 Doors & Hardware - Installation	68,985.00
		4 Windows, Glass & Glazing - Supply	22,000.00
	8.	6 Windows, Glass & Glazing - Install	6,250.00
		9 Drywall, FRP, and ACT	210,412.70
		2 Concrete Polishing	70,611.00
		4 Concrete Sealing	1,100.00
		6 Concrete Top Coatings	10,800.00
		7 Flooring and Tile	121,230.00
		8 Paint & Coatings	123,847.00
		9 Stucco Systems	22,000.00
		0 Acoustic Panels - Supply	70,475.00
		1 Acoustic Panels - Install	27,322.00
	10.	3 Specialties	31,794.00
		1 Fire Suppression	23,505.00
		2 Domestic Plumbing	476,700.00
		3 HVAC Dry Side	560,852.00
		2 HVAC DDC Controls	213,835.00
		4 HVAC Hydronics / Wet Side	404,160.00
	2	6 Electrical, Fire Alarm, Data	1,811,280.00
		Science - Bid Package 03	6,409,573.08
A 1 1 C			
AHS	Amendme	ent 05 Totals	

Description		\$	Amount 6,409,573.08	Totals	Rate
	Contractor's Contingency	\$	320,478.65		5.000%
Premium/	Overtime Labor Contingency	\$	31,577.33		0.493%
	General Liability Insurance	\$	64,235.48		0.950%
	Surety Bond	\$	64,235.48		0.950%
	Fee	\$	258,378.75		3.750%
	Corporate Activity Tax	\$	40,746.33		0.570%
Propos	sed GMP Amendment 05			\$ 7,189,225.09	
Current GMP				\$ 12,203,924.40	
	Proposed GMP	146		\$ 19,393,149.49	



Assumptions, Clarifications, & Exclusions

01.31.2024

AHS GMP Amendment 05

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- Amendment five is specific to building A Science only and is based on the following documents:
 - o 19-031 AHS Set A Science 100CD Drawings 231122
 - 19-031 AHS Set A Science 100CD Revision 1 231122
 - 19-031 AHS Set A Science PERMIT SET Drawings Rev 2 (issued 240106)
 - o 19-031 AHS Set A Science 100CD Project Manual 231122
 - 19-031 AHS Set A Science 100CD Revision 1 Summary 231122
 - 19-031 AHS Set A Science PERMIT SET Project Manual Rev 2 (01-05-24)
 - 19-031 AHS Set A Science Structural Calculations 231219
 - 20-568 AHS_SciencesBuilding_RBMS 041720
 - G2_AHS Science_Phase 1_ACM Scope of Work_121323
 - G2_AHS Science_Phase 2_ACM Scope of Work_010524
 - G2_AHS Science_Phase 3_ACM Scope of Work_010524
 - AHS_Bid Package 03 Pre Bid Addendum 01 Dated 1.8.2024
- Phasing: Science facility improvements will be conducted within a partially occupied educational facility. AHS, HMK, and CM/GC have agreed to break up construction activities into three phases which has resulted in minimal facility, student, and staff disruptions.
- Schedule: December 2023 December 2024.
- Specific inclusions / clarifications:
 - General conditions through December 16th, 2024.
 - Door and hardware package based on the most recent coordination documents furnished by Arkitek 01.08.2024 between Salto access control hardware, electrician, and door / hardware vendor.
 - ASD has agreed all access control, low voltage, data, fire alarm, and clock work (conduits and finished trims) be surface mounted in Library, Tech, and Counseling levels.
 - ASD has agreed all surface mounted electrical and low volt components be unpainted galvanized. Factory finish or on site painting of conduits and boxes are excluded.
 - ASD has committed to shutting down the Library space for two consecutive weeks for electrical, low volt, and access / security control work.
 - Library floor protection has been reduced to one installation / removal of Ram Board floor protection. Maintenance of floor protection is limited to not exceed two consecutive weeks.
 - Library and Counsel temporary barricades have been reduced and consolidated to one installation / removal. Maintenance of temporary barricades is limited to not exceed two consecutive weeks.
 - ASD has committed to accept less costly, paint grade, running trims and panels. Contractor's choice with Arkitek's approval.
 - Installation labor for one W4 window added to SC-6. Procurement managed through Humanities window allowance buyout.
 - o Light modifications of up to thirty-four (34) existing door frames to accommodate new door panels.
 - Finishes aligned with the R2 bid set finish schedule. Patch and repair of finishes outside of finish schedule not included.
 - Temporary storage at Lincoln Elementary School furnished by ASD through the duration of construction activities.
 - o Stucco limited to A111 corridor ceiling associated with structural framing work.
 - o Cx, startup, TAB, warranty on new equipment.

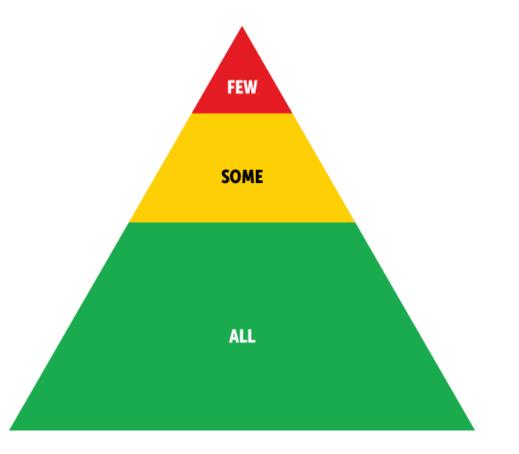


- Exclusions:
 - Any improvements not specifically noted "INCLUDED" on the amendment 05 detailed estimate.
 - o General Conditions, temporary barricades, floor protection beyond limitations noted above.
 - o General cleaning, waste management, and temp barricades beyond current allowances carried.
 - Abatement beyond specific limitations provided within g2 documents.
 - Final cleaning. ASD has elected to manage all final cleaning within the Science facility.
 - Patch and repair finishes (flooring, flooring base, wall and lid gypsum, wall and lid painting, ACT repairs or replacement, any finish carpentry, finish trim, stucco or stucco paint) not clearly identified and quantifiable within the R2 bid set documents.
 - Finishes related patch and repair COR work to be reviewed on a weekly basis with HMK, ASD, and Arkitek to track progress of finishes patch and repair. COR review and approval must be provided to CM/GC posthaste to avoid schedule delays.
 - Factory finish or on-site painting of new electrical and low volt surface mount conduits and fixtures.
 - o Costs or schedule impacts associated with owner, city, or design changes beyond Science Revision 02 set.
 - Duct cleaning, cleaning of existing grills scheduled to remain, or ionization filtration. O&M's of existing equipment.
 - Structural engineering.
 - Temporary heating / cooling. (Keep existing systems operational during construction is included).
 - DAS system costs beyond allowance currently included in amendment 05.
 - Moving, handling, or protection of occupant items left within the construction work area(s) prior to ASD opening access to KNO for construction activities.
 - Electrical monitoring and metering.
 - o Procurement of chemical storage cabinets or Salto access door hardware. Both items are OFCI.
 - EIFS work or EIFS warranty.
 - Glue laminated beam repair work (or associated patch back) at all four stair landing locations. ASD has elected to hold off on these improvements until they can gain more clarity on extent of work from structural engineering EOR.
 - Warranty of existing equipment and systems scheduled to remain.
 - BIM services, permit fees, acoustical engineering and caulking, expansion joints and expansion joint covers.
 - Damages or costs associated with extension of builder's risk policy resulting from owner, city, owner rep, or design changes or clarifications.
 - o Unforeseen conditions (i.e., existing utilities not clearly shown on plan set, abandoned utilities).
 - Roof patching warranty.
 - Any fire / smoke dampers not currently shown on plan set.
 - o Replacement of the original single check valve serving the existing fire sprinkler line.
 - Repair, refinish, or sub tops for existing casework scheduled to remain.
- Note: ASD, HMK, Arkitek, and CM/GC to manage all OT/Premium contingency funds and distribute to subcontractor team on 'as needed' basis.
- All patch and repair of finishes outside of science classroom spaces to be managed by ASD, HMK, and Arkitek. Periodic and timely field directives to KNO will be required to promptly release work and avoid schedule delays. ASD, HMK, Arkitek, and KNO will review status of CORs and field directives related to patch back of finishes on a weekly basis.

Mental Health Supports



MTSS Tiered Supports (Mental Health)



TIER I—UNIVERSAL INTERVENTIONS

TIER II—TARGETED INTERVENTIONS

TIER III—INTENSIVE INTERVENTIONS

Tier 1

- Counseling Team (2.5 Counselors)
- Trauma Informed practices
- Question, Persuade, Refer (QPR)
- Safe Oregon
- Erin's Law Instruction
- Student Advocates
- Health 1 and Family Health
- School-Based Health Center
- Clubs/Activities
- Positive Staff/Student Relationships
- Resource presentations
- Student Advocates



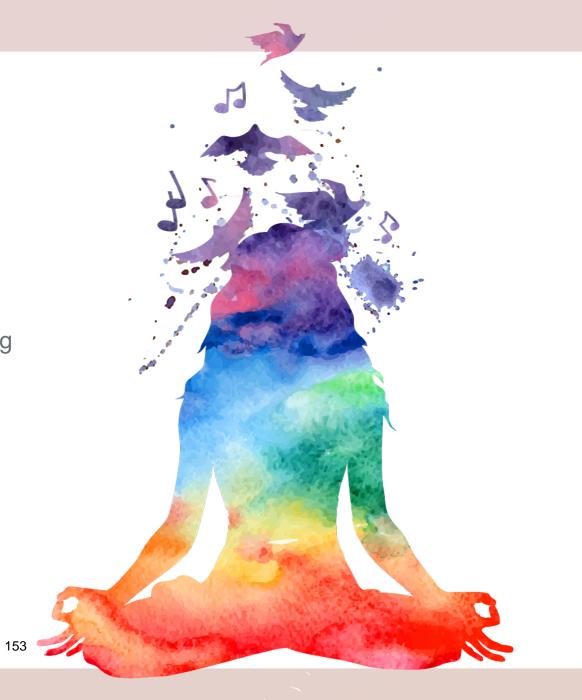
Tier 2

- Youth Crisis Line
- Restorative Justice Practices (addressing harm)
- Outside Agency Referral
- Yellow Flags
- Engage Care Team
- SST
- Small groups (Drug & Alcohol / Technology)
- Risk Assesments



Tier 3

- Drug and Alcohol Assessment-La Clinica
- La Clinica Refer Out
- La Clinica 1.5 Clinicians for 1:1 counseling
- Kolpia Counseling Referral
- JCMH
- Behavior Contracts
- Safety and Support Plans
- Re-entry Planning
- 504 Accommodations



UPDATED GRADUATION REQUIREMENTS

LANGUAGE ARTS

- Was: 8 Credits of English Language Arts
- Now: 8 Credits of Language Arts
- Comes from Access to Linguistic Inclusion (HB 2056)
- Changes Definition of World Language: Sign Language and ELD
- More flexible credit options for multilingual students

LANGUAGE ARTS EXAMPLES

Course	Credit Option	Requirements and Notes				
Advanced English Language Development	Language Arts	 Course covers ELA and Literacy standards. Student demonstrates proficiency Correct teacher endorsements 				
English Language Development	World Language	 Course covers World Lang standards Student demonstrates proficiency Correct teacher endorsements 				
Spanish Lit and Language	Language Arts	 Course covers ELA and literacy standards Student demonstrates proficiency Correct teacher endorsements 				
Literature Course on an International Transcript	Language Arts	 International equivalent to Oregon Langauge Arts course 				

ESSENTIAL SKILLS ON PAUSE

Essential Skills Requirements are suspended through 2027-28 per ODE vote

• All other existing requirements remain in place

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Ashland School District 5 Statement of Resources and Requirements Fiscal Year Comparison - 2024 vs 2023

	Current Year:			Projected	Compared to Last Year:			:
	Budget	Fiscal 2024 at	% of	Fiscal 2024 at	Budget	Fiscal 2023 at		FY 2023
	FY 2023-2024	1/31/2024	Budget	6/30/2024	FY 2022-2023	12/31/2023		Actual
General Fund Revenues								
State School Fund Formula								
State School Fund	12,525,000	8,927,013	71.3%	13,396,226	12,135,000	7,543,381		12,692,183
Property Taxes	16,950,000	15,366,523	90.7%	17,166,523	16.300.000	15,162,350		16,294,912
Common School Fund	335,000	-	0.0%	350,000	275,000	-		322,236
Federal Forest Fees	30,000	-	0.0%	30,000	30,000	-		28,458
Youth Levy	4,800,000	4,470,352	93.1%	4,860,352	4,350,000	4,226,173		4,542,838
Interest on Investments	650,000	483,120	74.3%	1,018,120	145,000	323,166		688,082
Tuition and Fees	75,000	32,241	43.0%	71,241	75,000	33,024		93,489
Rentals	85,000	10,735	12.6%	75,735	50,000	31,857		76,242
Contributions	25,000	98	0.4%	25,098	50,000	222		2,228
Fees Charged to Grants	300,000	46,685	15.6%	221,685	250,000	41,555		228,630
Other Local Sources	215,000	17,387	8.1%	95,387	90,000	31,934		50,230
Fund-raising - Fund 105	200,000	200,748	100.4%	341,748	200,000	146,171		258,367
Class Fees - Fund 110	300,000	92,342	30.8%	206,342	250,000	110,848		203,592
Other Intermediate Sources	700,000	-	0.0%	700,000	600,000	-		783,723
Other State Sources	-	-	#DIV/0!	15,000	-	-		306,555
Other Federal Sources	10,000	-	0.0%	-	10,000	-		-
Other Sources	160,000	-	0.0%	160,000	160,000	1,500		161,500
Total Revenues	\$ 37,360,000	\$ 29,647,244	79.4%	\$ 38,733,457	\$ 34,970,000	\$ 27,652,181	\$	36,733,265
General Fund Expenses								
Salaries	19,699,090	9.880.927	50.2%	20,467,127	19,111,116	9.129.442		19.090.478
Benefits	12,832,262	6,646,545	51.8%	13,339,745	11,873,274	6,063,863		12,706,604
Purchased Services	2.795.132	1,767,617	63.2%	3,555,617	3.249.730	1,558,477		3.412.690
Supplies & Materials	1,496,870	1,074,023	71.8%	1,428,023	1.515.135	720,707		1,223,467
Fund-raising - Fund 105	225,000	120,656	53.6%	228,467	215.000	60,677		208,932
Class Fees - Fund 110	147.500	83.503	56.6%	203,603	370.000	59.456		201.097
Capital Outlay	20,000	-	0.0%	200,000	30.000	35,470		59.904
Other Objects	569,146	689,512	121.1%	737,512	440,745	483,121		533,239
Transfers	365,000	4,000	1.1%	114,000	365.000	2,800		14,093
	500,000	4,000	0.0%	114,000	303,000	2,000		14,095
Contingency	,	-		-		-		-
Total Expenses	\$ 38,650,000	\$ 20,266,783	52.4%	\$ 40,074,094	\$ 37,170,000	\$ 18,114,013	\$	37,450,504
Beginning Fund Balance	\$ 2,900,000	\$ 2,325,442	80.2%	\$ 2,325,442	\$ 3,700,000		\$	3,042,681
End of Fiscal Year Balance	\$ 1,610,000			\$ 984,805	\$ 1,500,000		\$	2,325,442

Ashland School Board Periodic Financial Review January 2024

Monthly Questions for Management:

1. Are all financial statements that have been provided to the Board accurate and complete to the best of your knowledge?

	YES	NO NO	NOTES:			
2.	Have there been any actual or suspected cases of fraud?					
	YES	NO NO	NOTES:			
3.	. Are all cash, expenditure and investment accounts reconciled to the general ledger?					
	YES	NO NO	NOTES:			
4.	Does the current r	eport reflect expend	ditures, as expected, without material differences?			
	YES	NO NO	NOTES:			
5.	Does the current re	eport reflect revenue	es, as expected, without material differences?			
	YES	NO NO	NOTES:			
6.	Have all payroll rep	oorts been filed and	have all payroll liabilities been paid on time?			
	YES	NO NO	NOTES:			
7.	Have all federal and been filed on time?		ent requests as well as required financial reporting forms			
	YES	NO NO	NOTES:			

Monthly Discussion Questions:

- 1. Are there any other financial-related matters the board should be aware of that are not reflected in this report, the monthly financial bond report, or the board's agenda for today? NA
- 2. Are there any new pronouncements on the horizon that may require additional staff time or disbursement of funds to implement properly? NA



Directors of the Ashland School District,

The administration has concluded that a lack of funding will necessitate a reduction in force for the 2024-2025 school year. We have verified the certification, seniority, and qualifications of each employee. Please take action to initiate layoff procedures.

This begins a consultation period. This consultation may take up to thirty (30) days when Council reviews our procedures to ensure it conforms with the contract.

Upon concluding this consultation period, the affected employees will receive notice from their building principals. Affected employees will also receive a certified letter from the district with written notice of the layoff. This notice will include the proposed time schedule and reasons for the proposed action.

Sincerely,

Jay Preskenis Pronouns: he, him, his

Director of Human Resources Ashland School District <u>541.482.2811 ext. 1103</u> | Fax <u>541-482-2185</u>